

Critical Mission

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FEATURED ARTICLE

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Doing Business Process Management *RIGHT* with SharePoint and Dynamics CRM

Business process management (BPM) is critical to the success of any business venture. Savvy managers are contemplating software solutions to formalize their BPM best practices – let's talk about are your options for making workers, managers and executives work better together.

Benefits of a BPM Solution

Here are the primary benefits of using software to help with business process management.

Efficiency – spend more time working and managing, less time with redundant communications via email and meetings.

Responsibility – know who's assigned to what and when it's due.

Accountability – just being assigned doesn't mean it gets *done*. Or, done correctly.

Transparency – any interested party should be able to review the status of a process without bothersome interruptions.

Repeatability – once you have a process that works, it should be done consistently over time even as staff members come and go.

Agility – processes must be able to change and evolve to meet new challenges or opportunities.

Traditional software applications work at a transactional level, keeping track of basic data and relationships. They don't address the nature of the way people actually work and collaborate. Developing custom BPM software from scratch is usually far too expensive to consider.

The Tracking Spreadsheet

Without a formal BMP solution, most people end up circulating the ubiquitous Excel "tracking" spreadsheet via email attachments, then spend countless unproductive hours in meetings trying to stay on top of what's in the spreadsheet. Spreadsheets support almost none of the goals described previously. There must be a better way! We'll discuss two options and the relative merits of each, along with some guidance on how to pick one over the other: **SharePoint** and **Dynamics CRM**.

Features Common to Both

Both SharePoint and Dynamics CRM offer an outstanding starting point on which to build a custom BPM solution. Starting from scratch means you have to implement all of this before you create anything that actually moves your business forward.

- High-performance, scalable, multi-device web application.
- User identity and role-based security, essential for responsibility and accountability in a team environment.

- No-code customizable data entry forms. Don't waste money on expensive software developers.
- No-code workflow engine, supports the goal of repeatability.
- Customizable, scope-able search with security trimming makes sure you find the right information that you can actually use.
- Extensive Office integration. Continue using Outlook, Excel and other products.
- Formal change management protects your investment as new versions of SharePoint and Dynamics CRM become available.
- Developer API and web service model for required features that can't be accomplished out-of-the-box.
- Well-supported by both Microsoft and 3rd Party. You won't be doing this alone.

Process Repeatability

Both SharePoint and Dynamics CRM have sophisticated no-code workflow engines that help you streamline and automate standard procedures. Non-programmers can use IF..THEN logic to make decisions and DO..WHILE and WAIT..FOR logic to react to changes. Workflows can be triggered automatically when conditions are right, for example, alert someone when a task is overdue by more than two days. Or, workflows can be started manually when someone decides they're needed, for example, a project is far enough along that it's time to start a formalized review process.

Accountability and Transparency

Both SharePoint and Dynamics CRM have extensive, automatic features that promote accountability and transparency.

- Created By/On
- Modified By/On
- Versioning/Auditing
- Workflow History

By tracking all this information it becomes possible to answer questions like, "How much time passes for each item?" and "Are there bottlenecks?" You need metrics to make informed decisions about your processes.

Unique to Dynamics CRM

Dynamics CRM is based on a formal object-relational database with all the data integrity and data management features you'd expect, with very granular security that goes all the way to the field level.

The no-code forms designer supports complex designs that adjust dynamically to circumstances, based on data in the record.

Dynamics CRM has a powerful reporting and charting subsystem based on SQL Server Reporting Services, which can be customized by non-programmers.

Unique to SharePoint

SharePoint's unique benefits are primarily driven by the *lack* of a formal database structure. SharePoint supports continual, ad hoc additions and adjustments to the data being collected.

SharePoint is designed around a wealth of powerful collaboration features, and you're free to leverage them immediately.

Many organizations already own SharePoint licenses and are simply not using them, either at all or for BPM support. SharePoint could easily be a totally free solution.

How to Decide

Dynamics CRM is more expensive relative to SharePoint, and imposes more structure on your process. Pick Dynamics CRM when:

- You need highly structured, relational information.
- Your BPM processes are tightly coupled to your sales or service process.
- Formal reporting is important.
- The BPM solution has a high business value with long lifetime.

SharePoint is a better option when:

- Ad hoc collaboration is important.
- The process may evolve quickly or frequently.
- The process is document or search oriented.
- Budget is tight.

Hybrid Solutions

You don't have to pick just one. Both Dynamics CRM and SharePoint are aware of one another and can work together. For example, Dynamics CRM can handle the "heavy lifting" for core data entry and reporting while SharePoint handles documents and collaboration.

Summary

With so much already built-in and ready to use, it makes sense to leverage SharePoint or Dynamics CRM for your business process management solution. You get a huge head start with all the fundamentals, on a platform that supports easy customization by non-programmers, without breaking the budget.

Contact Alto if you'd like to learn more about how to take the initiative and get your business process management plans in order.