Critical Mission

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FEATURED ARTICLE

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Business Process Management (BPM) with SharePoint

*Managers exist because business process management (BPM) is critical to the success of any business venture. If you are **still using** Excel spreadsheets to keep track of things, if you're **still bothering** people with emails and phone calls to get status updates, if you schedule weekly **standing meetings** to review routine work procedures, we need to talk!*

Is this You?

Savvy managers leverage the amazing out-of-box BPM features of SharePoint to make their lives easier and more efficient. If you're a staff member struggling with keeping your management informed and in the loop while still getting actual work done, you need to make the case for using SharePoint to make your life much easier. In this article I'll make the case for doing BPM with SharePoint.

The Tracking Spreadsheet

I'm sure you've all seen examples of the ubiquitous Excel spreadsheet used for keeping track of projects, tasks and processes. Excel does an excellent job of this and is super easy to learn and use, not to mention endlessly flexible to accommodate changes and special cases. The problem is that to get any benefit from the spreadsheet you have to find the right version of the right file, and open it. That alone can be a file management nightmare – is this the most current copy? What changed since the last time you looked? How do others access the file, is it on a shared drive or do you email copies to those who need it?

SharePoint's Answer: Lists can be easily configured to look and work similar to Excel spreadsheets. As in Excel, new columns can be added any time and existing columns modified to handle changes to your process. Because a SharePoint lists stays "parked" in the same location all the time, everyone can find it. Versioning features ensure you can keep track of changes. Multi-user access means multiple people can be reviewing and updating the list at the same time.

One Size Fits All

For complex processes it's not unusual for the spreadsheet to have dozens and dozens of columns and hundreds of rows. It's unlikely that everyone looking at the file actually cares about every row and every column all the time. Sure, Excel allows you to hide and re-arrange columns, and filter and sort rows, but once applied it affects everyone looking at the file. You'll spend a lot of time customizing Excel to show you the data "your way" and then un-doing customizations made by others.

SharePoint's Answer: Lists can have multiple views, each optimized to show the right data in the right order to each role in the process. For example, people actively working on a process want to see what's going on right now, and

what's coming up. People who review and approve want to see what's been done recently. People who manage the big picture want a summary of the process and possibly be alerted to over-due or otherwise troublesome issues. SharePoint views are optimized to show just the right columns in the right order, and just the most relevant rows also in the best order, for getting something done.

Status Updates

Nobody likes being pestered for status updates, especially when deadlines and due dates are flexible or open-ended. "Did you ever get to that…" is often followed up with "Well, let me know when…" If your business process involves multiple people you know the time that's wasted when a process stalls. A spreadsheet just sits like a lump in a folder somewhere, passively waiting for someone to open the file and note that something did (or, did not) get done.

SharePoint's Answer: In addition to the customized views described previously, lists also have active alerting mechanisms. You can subscribe for alerts when items are added or removed from lists, when changes are made, and other circumstances. Instead of regularly bothering co-workers you can sit back and wait for SharePoint to let you know that progress has been made.

Process Automation

Some processes have routine tasks that don't involve much in the way of human intelligence to complete. For example, if a due date is approaching – send a reminder. If a due date is missed – let a manager know. If a task is completed and ready for review, schedule a meeting. If a cost estimate exceeds a maximum – have someone approve it. These are simple tasks, sure, but they still require someone to

remember to do them. Worse, neglecting to do them often goes unnoticed, making the process even more inefficient.

SharePoint's Answer: Workflows can be attached to lists. A workflow is a kind of logic tree that anyone can learn to construct. The workflow looks at data in the list and makes decisions about what to do and when to do it. All of the examples in the previous paragraph are easy to automate in a workflow. The workflow engine is quite powerful and Alto has done some amazing things for our customers.

Another benefit of workflows is that they apply the logic consistently and keep a history of actions. As logic changes over time the workflow can keep on chugging away, versus circulating a memo and hoping people read it and change their procedures.

Accountability

Who changed a particular row and column in the spreadsheet? What were the values before the change? How much time passed between one person's change and the next? Who approved the work or assigned the next task? Excel is no help in these areas, at least not out-of-the-box and without careful attention to keeping archived copies of the file.

SharePoint's Answer: Lists and workflows operate on individual rows in the list and keep track of who creates and modifies data in the list. Versioning keeps track of the history of changes to a row. All of this information is captured and tracked automatically.

Summary

Ditch the annoying spreadsheets, disruptive phone calls, endless emails and unproductive meetings by leveraging the power of SharePoint to streamline and even automate BPM. You'll be more productive and enjoy the benefits of a transparent, accountable, and repeatable process.

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