

4 day BPM Master Training Class

- *Learn technologies and global best practices improving business processes*

Introduction

The Business Process Management (BPM) Certificate Program is designed from global best practices among our 70,000 members. The program covers concepts and technologies for:

- Streamlining and re-engineering
- Requirements gathering and analysis
- Application integration
- Process design and modelling
- Monitoring and process analysis
- Managing change

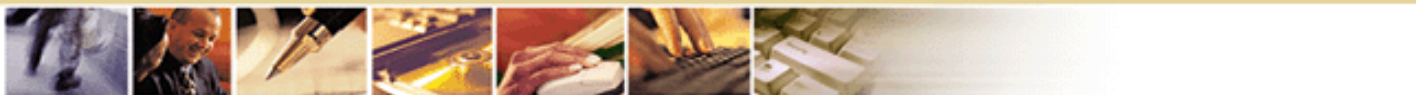
AIIM represents the Information Management community as the global association for both users and suppliers of Enterprise Content Management solutions – the strategies, services and technologies which enable organizations to capture, manage, store, preserve and deliver information to support business processes. We have provided service for more than 60 years, and are a non-profit organization.

Course Development

The course objectives and content are defined and reviewed by AIIM Education Advisory Groups in the US and Europe, representing AIIM's more than 70,000 members. These Education Advisory Groups have subject matter experts from the following companies:

- | | |
|-----------------------------------|---|
| • Doculabs | • GlaxoSmithKline |
| • CMS Watch | • TOWER Software |
| • Kofax | • Ricoh |
| • Accenture | • Gartner |
| • Docubase Systems | • Canon |
| • US Department of Treasury | • The National Archives of the United Kingdom |
| • US Courts | • Zylab |
| • Westminster College | • Royal Mail |
| • Fujitsu | • BearingPoint |
| • Harris Corporation | • Oracle |
| • IBM | • Serco |
| • EMC | • Microsoft |
| • JPMorgan Chase | • Virgin Media |
| • Marion County Health Department | • The Process Factory |
| • Gimmel Group | |

The course materials were developed by CMS Watch based on requirements and best practices defined by the above members.



Course Description

The BPM Master Training Class provides excellent coverage of BPM with the main elements from AIIM's BPM Strategy, Practitioner and Specialist training programs, along with case study exercises. This 4 day training program covers why, what and how to implement BPM.

This training program concentrates on delivering to the trainee the skills and tools to use technology to improve business processes. In some regards, the BPM courses can be considered as the key consulting and analysis tools to best utilize ECM technology. To be sure, we cover the essential technical implications of and approaches to Business Process Management. For example, what is a Workflow Engine, when should it be used, how does it work and how can I construct my business analysis activities to best utilize this technology? With much of the focus is on providing trainees with techniques and tools, we cover in detail the major modeling tools, how they work and how best to get value from them?

We also cover all the standard areas of general business analysis such as defining processes, identifying key stakeholders, modeling "As Is" and "To Be" scenarios, and how to test these (via technology and in practice). These key areas should be considered from a broad perspective within the enterprise and in relationship with ECM. Business improvement will often not come from the exclusive use of ECM technologies, but by combining these with ERP systems, legacy applications, or other common business applications and processes.

While the goal of this course is to equip trainees with the basics of business process improvement techniques, we also briefly cover related areas including methodologies that make great use of such techniques. These include Six Sigma, Lean and TQM, along with some important historical perspective on the roots of BPM – with particular focus on BPR (Business Process Re-Engineering), lessons learned from that period – and direction on where the industry and requirements are currently headed. This will be particularly important as BPM provides the opportunity to make a radical change to a business, focused on outcomes not just on processes (unlike earlier methods that looked to the collective impact of multiple small changes).

Although the course content will focus on BPM, the basic techniques and education will also be applicable to those wanting to simply make small incremental changes. In short, this is a highly practical training option – of appeal to broad range of trainees.

- The **BPM Strategy** (Why BPM?) component provides the knowledge to get ownership and support from senior executives and users
- The **BPM Practitioner** (What is BPM?) component covers the practice of BPM, role of ECM in BPM, business analysis, basics of process improvement, flowcharting 101, process modeling, BPM approaches, BPM technologies overview, BPM technology dissected, and Collaboration
- The **BPM Specialist** (How to implement BPM?) component covers the implementation of programs and projects, and related tasks such as the business case for BPM, stakeholders & the project team, gathering requirements, analyzing requirements, process design best practices, validating requirements, BPM project stages, project advice, pitfalls & best practices, and management methodologies
- The **BPM Case** (Putting it all together) component allows you to discuss, share and learn global best practices for BPM.



Course Objectives:

The AIIM Education Advisory Groups defined the following learning objectives for BPM:

- Definition
- Vocabulary for BPM
- Strategy Phase
 - Review of business and IT strategy
 - Review of business drivers
 - Review/decide target end-state
 - Decide performance measures
- Definition
 - Analyze AS-IS business processes
 - Map AS-IS business processes
- Definition of TO-BE business processes
 - Map TO-BE business processes
- Modeling/Simulation
 - Model TO-BE business processes
 - Simulate and test business processes
- Deployment
 - Deploy processes
 - Change Management
- Monitoring
 - Measure and monitor
- Optimization/Improvement
 - Review
 - Optimize
 - Change and redeploy

Course Designation

You will be awarded the AIIM BPM Master (BPM^M) designation after passing the online exam and case study exercise. This is a new AIIM standard for industry professionalism and knowledge. By earning this designation, you can call yourself an AIIM BPM Master. You can use the associated logo and title on your business card, email signature, web page, etc. The exam and case study exercise are available via the Internet. You must pass the exam within 6 months of attending the training course and submit the case study within 3 months.

Benefits of becoming BPM Master (BPM^M):

- Position yourself to be tomorrow's leader by enhancing your business and professional skills
- Learn global best practices for planning and implementing BPM
- Discover real world solutions and best practices for the challenges you face
- Learn from experts in the field who are able to answer your questions, address your comments, and who are willing to accept your feedback

Who should attend AIIM's BPM Master Class?

The BPM Master Class is designed for Business Managers, Business Analysts, IT Managers, Compliance Officers, Archivists, Librarians, Risk Managers, Records Managers, and Information Managers, as well as for solution providers, sales consultants, project managers, and technical staff.



Audiences

- Business Analysts & Consultants
- IT Management
- Technical staff
- Record Management personnel
- Business Unit (line staff & management)
- Implementation team-IT and business
- Suppliers/Solution Providers/Vendors
- Executives
- Change agents
- Users

Course Material

You will receive a BPM Workbook and access to supporting BPM online courses and exam.

- The **BPM Strategy** component will be accompanied by a succinct overview of what BPM covers; the strategy drivers for its introduction that should be considered; the benefits that can be realized; and the impact its introduction can be expected to have on an organization at all levels.
- The **BPM Practitioner** component will be accompanied by a handout that summarizes the key concepts, including references to authoritative publications and web resources.
- The **BPM Specialist** component is comprised of (multiple) one-page summaries and checklists summarizing the relevant topics.
- The **BPM Case** component provides you with a series of case study exercises that gives participants a feel for what is involved, the information that needs to be gathered and processed, the outcomes expected and the amount of effort likely to be involved in a real world situation.

Course Agenda

Strategy (Why BPM)?

What is BPM?

Learning Objectives
BPM defined
When to use BPM
The tools of BPM
Terminology overview
Wrapping Up

Role of BPM in ECM

Learning Objectives
What is ECM?
Why ECM?
Commonality between BPM & ECM
Examples
Wrapping Up

Business Case

Learning Objectives



Business scenarios -- identifying the problem
Determine value categories
Eliminate/Document/Calculate
Example Cost of Doing Business (CDB)
Wrapping Up

BPM as a Practice

Learning Objectives
Business Analysis
Process Modeling
BPM Technologies
BPM Methodologies
Wrapping Up

BPM as a Project

Learning Objectives
Gathering Requirements
Stakeholders and Team
Managing Change
Evaluation and Continuous Improvement
Wrapping Up

Caveats, Pitfalls and Best Practices

Learning Objectives
What BPM projects won't solve
What BPM technology won't solve
Wrapping Up

Practitioner (What is BPM?)

The Practice of BPM

Learning Objectives
Business Analysis
Process Modeling
BPM Technologies
BPM Methodologies
Wrapping Up

Role of ECM in BPM

Learning Objectives
What is ECM?
Why ECM?
Commonality between BPM & ECM



	Examples
	Wrapping Up
Business Analysis	
	Learning Objectives
	What is Business Analysis (BA)?
	The Process of Analysis
	BPM and the BA
	Practical BA Applications
	Wrapping Up
Basics of Process Improvement	
	Learning Objectives
	Making the case for process change
	Process Characteristics
	Streamlining
	Re-Engineering
	Wrapping Up
Flowcharting 101	
	Learning Objectives
	Flowcharting Fundamentals
	Symbols and Functions
	Principles and Best Practices
	Wrapping Up
Process Modeling	
	Learning Objectives
	Charting vs. Modeling
	Process Modeling Tools
	Process Modeling Options
	Wrapping Up
BPM Approaches	
	Learning Objectives
	Business Process Improvement
	Business Process Reengineering
	SOA
	Six Sigma/Continuous Improvement
	Wrapping Up
BPM Technologies Overview	
	Learning Objectives
	Workflow Defined
	Forms-Centric vs. Process Engine-Centric
	Workflow Options



Production Workflow

Wrapping Up

BPM Technology Dissected

Learning Objectives

Key elements of BPM technology

BPM Dissected

Standards & Protocols

Wrapping Up

Enterprise Application Integration (EAI)

Learning Objectives

Definitions of EAI

EAI in Detail

EAI Technology

EAI and Business Process

Wrapping Up

Collaboration

Learning Objectives

What is Collaboration?

The Reality of Collaboration

Relationship with ECM and BPM

Workflow Options

Wrapping Up

Specialist (How to implement BPM?)

The BPM Project

Learning Objectives

Project and Process Lifecycles

Assess

Plan

Implement

Renew

Wrapping Up

Business Case for BPM

Learning Objectives

Introduction to BPM Business Cases

Identifying the Problem

Determine Cost Categories

Eliminate, Document, Calculate

Example



- Wrapping Up
- Stakeholders & The Project Team
 - Learning Objectives
 - Identifying Stakeholders
 - Building the Right Team
 - The Customer as a Stakeholder
 - Managing Stakeholders
 - Wrapping Up
- Gathering Requirements
 - Learning Objectives
 - Requirements in Context
 - Techniques
 - Caveats and Pitfalls
 - Wrapping Up
- Process Design Best Practices: The Human Dimension
 - Learning Objectives
 - Clusters & Bottlenecks
 - Parallel Processes
 - Natural Order
 - Check and Reviews
 - Wrapping Up
- Process Design Best Practices 2
 - Learning Objectives
 - Activity Theory
 - Routing
 - Workflow Balancing
 - Wrapping Up
- Implementation
 - Learning Objectives
 - What is Needed for Change
 - Finding the Right Technology
 - Proof of concepts (POCs) and Pilots
 - Implementation
 - Wrapping Up
- Change Management
 - Learning Objectives
 - Types and Approaches
 - Technology Change
 - Change Readiness
 - Best Practices for Implementing Change



Monitoring	Wrapping Up
	Learning Objectives
	Monitoring of Processes
	Process Analysis
	On Demand vs. Automated Reporting
	Wrapping Up
Management Methodologies	
	Learning Objectives
	What is a management methodology?
	TQM
	BPR
	Six Sigma
	Wrapping Up

Case (Putting it all together)

Ethics
Business Process Scenarios in Business Projects
Putting It All Together
Case Study
Exercise(s)

Summary

Training:

- BPM Master Class, 4-days, 9am – 5pm
- Includes access to 21 supporting web modules (each approx 1 hour) for 6 month
- Includes a case study exercise that must be submitted within 3 months
- Includes 3 opportunities to take and pass the AIIM BPM Master web exam
- Includes English language delivery and all training materials

Please contact AIIM if you would like to know the price for organizing a private class for your organization: training@aiim.org

Please note that this AIIM BPM Certificate Program is designed to give all participants an appreciation of BPM. You should not expect to gain in-depth expertise in all aspect of BPM from this Program. If you need in-depth expertise you should refer to specialist courses, references or expert assistance.

Agenda is subject to changes without notification.

