

⌘ Getting Workflow to Work

by John Hall of Integration Appliance (IntApp)

Increasingly, law firms are looking to business process management (BPM) and workflow technologies to increase their operating efficiency, accelerate organizational growth and improve the quality and timeliness of services provided to clients and internal consumers. Data management and systems integration are key areas that often are overlooked during the implementation of these new processes.

Defining Business Process Management

At the basic level, BPM is best defined as the creation of specific repeatable processes, the use of education and technology to streamline process execution and the ongoing tracking and measurement of performance across the organization.

The BPM Opportunity

By embracing BPM, organizations can restructure and simplify the way work is done. This approach offers greater visibility and predictability. More importantly, it provides a foundation for ongoing process improvement and refinement.

The best candidates for BPM are known, repeatable activities with enough value and frequency within the firm to justify the return on the resource investment necessary to optimize them. That return may take the form of improved revenue generation, reduced costs and expenses or increased overall staff productivity.

Candidates for BPM exist across all areas of firm operation and include:

Human Resources — Recruiting, employee orientation and account creation, staff reviews and transitions

Business Development — Marketing programs, conflict checking and new matter intake

Client Services — Billable work, staff collaboration and reporting tasks such as e-billing

Financial Management — Accounting issues such as reimbursements, prebilling and billing, along with strategic firm analyses and planning activities

Breaking Down BPM into Key Elements

When considering BPM, it's helpful to break out three related elements for consideration:

Business Process Analysis — The assessment of an existing practice and the modeling, design and definition of a new target process

People and Forms — The area where workflow technology comes into play, usually in the form of graphic interfaces to create and interact with forms that capture

information, in addition to personalized to-do lists, notification systems and activity-tracking dashboards

Systems and Data — The tools people use to actually perform work assigned to them, and the information that needs to flow among those people and tools in order to carry out various processes defined in the analysis phase and managed by workflow technology

People and Processes

Generally, the most significant investments of time in BPM are spent addressing the “people” side of the equation rather than the technology side. This investment includes an assessment of existing processes, selection of those processes to optimize, and navigation of the complexities associated with securing management and staff buy-in. The human investment also includes the design and analysis activities associated with rolling out new processes.

The importance of dealing with the people side of the equation cannot be overstated. People are far more complicated than machines, and far less predictable. Without a solid plan and the support of those affected, firms run the risk of automating a broken process. Becoming more efficient at inefficiency is a bad thing.

The Role of Technology in BPM

Technology is still key to achieving BPM success. While it's possible to re-engineer business processes that are then carried out and tracked manually, the volume and productivity requirements of legal environments make this approach highly inefficient. The right technology should make it possible to translate plans into reality quickly and enable more effective solutions and more productive workers by replacing *ad hoc* or manual activities.

The Technology Challenge

There are numerous software products designed to facilitate process re-engineering and ongoing execution and management that include established BPM solutions and emerging workflow technologies. These tools generally focus more attention on the “people” side of the equation. While they include essential components such as forms management, peer collaboration and activity tracking, such products do not necessarily make it easy to manage the actual data and information that are the subject of worker activity.

One example of this would be a product that provides the infrastructure and tracking to manage expense reimbursements or new employee intake processes. BPM and workflow software can do an excellent job helping organizations control the complexities associated with coordinating and tracking the steps that people take to carry out those processes. But such software does not automatically streamline and optimize the actual creation,

- manipulation and communication of information among people and the applications they use to carry out these tasks.

Why Firms Can't Forget Their Data

Consider the example of using BPM/workflow software to manage the new employee intake process. This scenario often involves using workflow to coordinate and track the activity of several resources including HR, IT and facilities staff. The steps of this process include creating user accounts across all relevant applications (document management, time tracking, cost recovery, etc.) and populating new-hire information into those and other systems (contact databases and the company intranet).

Workflow software can collect key information and bring together the right people to do their part in accordance with a defined process, but doing the actual work is another story. The result might be a system that instructs people at specific times to: "Go perform this manual, *ad hoc* activity, rekey information across various systems and update the dashboard when you're finished so the next person can receive similar instruction."

In short, firms need to take steps to streamline and automate the sharing of information and data among people and applications as part of BPM. Otherwise, the process will remain inefficient and unproductive.

Data Management Accelerates Workflow

By streamlining the way people interact with (or no longer need to interact with) data as part of BPM initiatives, firms can recognize significant gains in worker productivity and accuracy. In the case of new employee intake, efficient data management means not only collecting some basic new employee information through a workflow form, it also necessitates creating user accounts automatically and communicating that information across all relevant applications. When systems are connected and intelligent business rules direct information sharing among those systems, staff members receive updates that the job is already done for them rather than a notification of work to be done.

How to Approach the Data Challenge

Of course, there's a reason why BPM/workflow technologies have limited abilities to natively, bi-directionally communicate information across a wide range of systems and applications. It's a difficult and complex problem to solve. To address this complexity, firms have several options:

IT organizations can build custom data sharing mechanisms using batch scripts or other development tools. This approach can be successful but brings with it significant ongoing resource and maintenance requirements for IT and may result in functionally-limited or less efficient solutions.

Firms can acquire and deploy process or application-specific add-ons, such as connectors or utilities that allow specific applications to communicate information. This process can also be successful but tends to result in the proliferation of such add-ons, escalating IT complexity and similar maintenance burdens.

An increasing number of firms are pursuing a unified approach to data management achieved through the use of a centralized platform that serves as a hub and clearinghouse for all data communication. This method offers the benefits of a single standard and point of control.

Independent of the approach taken, firms implementing BPM would be wise not to forget the data side of the workflow equation. By delivering solutions that integrate people, process and information, IT can dramatically increase the productivity and satisfaction of timekeepers and staff throughout the firm. And that's something firm management will remember for a long time.

About our author :: :: ::

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