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Business Process Automation Anywhere and Everywhere with Kinetic Task 3.0

Business Process Automation (BPA) is typically reserved for complex, core business processes. Kinetic Task 3.0 now brings BPA to thousands of smaller processes across the enterprise.

Abstract

Nearly all enterprises see the advantages of business process automation (BPA). With it, complex tasks get done faster, more efficiently and with greater accuracy. Organizations today typically take one of three approaches to BPA: extending IT service management systems; implementing specialized BPA toolsets; or creating automated process workflows on the back of a business process management (BPM) implementation.

The expense and complexity of each technique typically limits BPA to core business processes. But every enterprise has hundreds or even thousands of other processes that could benefit from automation. Often, however, these are considered too “small” to justify a BPA development effort.

Kinetic Task 3.0, a workflow engine that uses a simple, configurable approach to BPA, can connect to virtually any application database to extend the benefits of BPA to any process where automation makes sense. Such “lightweight BPA” can cumulatively save an enterprise thousands of hours formerly spent on manual processing in IT, HR, sales and marketing, finance, facilities, and other areas, while improving the accuracy and quality of process execution.

What Price Business Process Automation?

BPM has been described as a systematic approach to making an organization's broad business process workflows more effective, efficient, and capable of adapting to ever-changing business and industry environments.[1] Several large enterprise software vendors offer BPM software and suites, often rolled up into even larger enterprise resource planning (ERP) systems. Most have been developed to optimize complex, core business processes, such as hotel/airline/car reservations, sales processes, or collections management. Developing specific business process optimization workflows for such core business processes usually involves a traditional software development methodology—requirements gathering, architecture design, coding, testing, user acceptance, and finally maintenance. Specialized programming or application development knowledge is often needed, along with long and expensive development cycles.

BPA is often considered a subset of BPM. BPM has been referred to as a "holistic" management approach that strives to promote efficiency on an enterprise level for the processes that matter most to the business.[2] BPA focuses on a more tactical and department level. In this sense, BPA can be considered the technology-enabled automation of activities or services that accomplish a specific function or workflow within specific areas, including sales, operations, supply chain management, human resources and information technology.[3] The goal of BPA is to not only automate business processes, but to simplify and improve business workflows as well. BPA can be a standalone initiative, but most often it is part of a larger, overarching BPM strategy.

There are three main techniques for automating business processes.[4] The most widely used technique involves extending existing IT service management (ITSM) systems, which are inherently automation engines, through web services, message queues and other methods. Using these methods to extend functionality to automate business processes is an effective but rather expensive and time-consuming option. The required expense and time stem from the fact that extending IT systems often requires specialized skills in specific software development environments, a traditional or faster "agile" software development methodology, and the expense of application life cycle management, the most costly component of which, over time, will be maintenance. And because ITSM systems have been tailored for IT thinking—and less about generic businesses processes—this approach may mean carrying a lot extra IT baggage for non-IT purposes.

For these reasons, many organizations use this option only when the desired automation applies to core business processes. And because such automation is based on

underlying IT platforms, its usefulness typically applies only to IT-related functionality, not to process automation needed by other departments and business units.

A second technique is the purchase of a specialized-purpose-built BPA tool. Vendors of such software tend to focus on different industry sectors, but their underlying approach is similar in that they attempt to provide a shorter route to automation by exploiting the user interface layer rather than going deeply into the application code or databases sitting behind them. These tools can be used directly by nontechnical staff and often offer rapid speed of deployment. Their drawbacks include the inability to fully exploit the capabilities of underlying application and database platforms, and, because of their specialized nature, limited rather than enterprise-wide process automation capabilities.

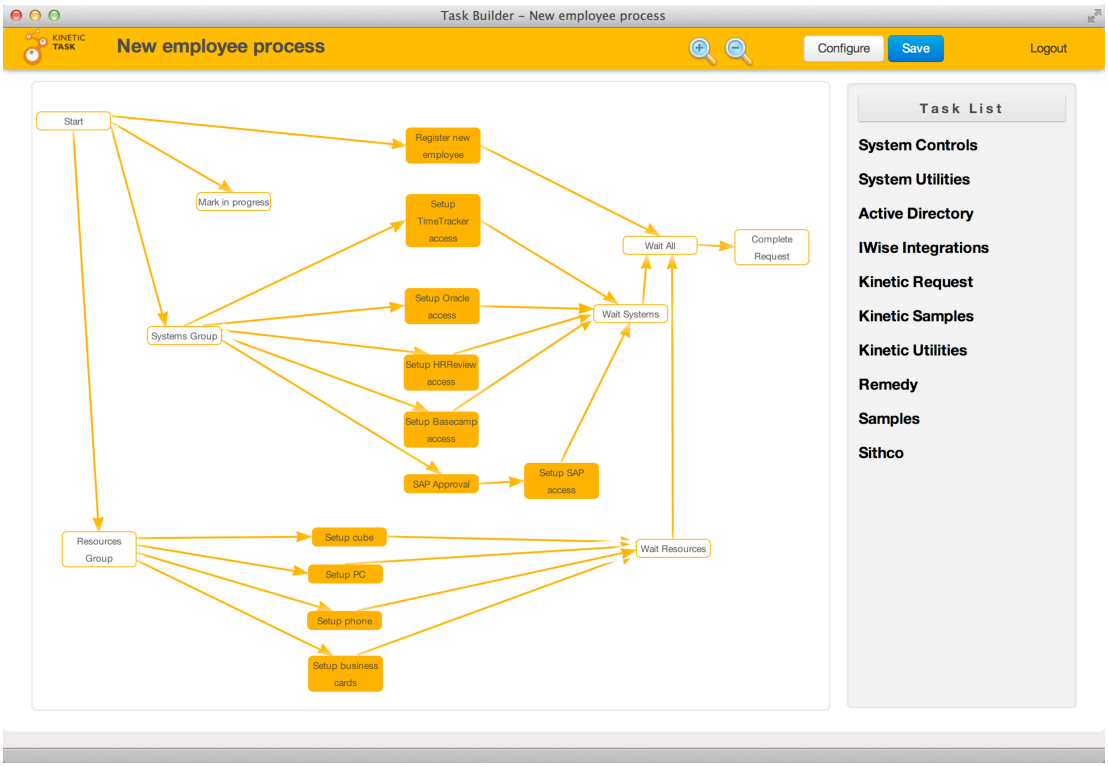
The third technique is to automate tasks as part of a BPM implementation. The actual tools to achieve this vary, from writing custom application code to using dedicated BPA tools. The advantages and disadvantages of this approach are inextricably linked: the BPM implementation provides an architecture for all processes in the business to be mapped, but the implementation itself delays the automation of individual processes and so benefits are lost—and processes may even have to be re-engineered—in the meantime.

Kinetic Task: "Lightweight" BPA with big benefits

Both BPM and BPA are generally viewed as major initiatives whose complexity and scope limit their suitability to major or core business process workflows. But every enterprise has hundreds or even thousands of smaller process workflows, sometimes involving only a handful of people or single departments. Many of these workflows include numerous manual processes. Their manual nature can introduce errors, delays, and inefficiencies, making them prime candidates for the benefits of workflow automation. But until now, these processes were considered too small to justify the development effort and expense of automation.

Kinetic Task 3.0 now makes it practical to automate an unlimited number of smaller business processes for significant enterprise-wide benefits. It can save large organizations thousands of hours of manual labor annually and greatly increase the quality and accuracy of the workflows involved in these processes. It takes advantage of the fact that triggers start most business workflow processes, often when a data field is updated in an application database. By monitoring application log files, an application like Kinetic Task can invoke predefined workflow steps, such as sending emails and initiating and enforcing approval processes, that result in the process being completed with little or no manual intervention.

Unlike most other BPA approaches and products, Kinetic Task can be extended to nontechnical users in any department or business where “lightweight” business process automation can produce tangible cumulative labor savings and increase both the quality and efficiency of workflow execution. It does so by use of configurable task trees, which allow nontechnical users to easily define the steps in a process automation workflow; and a powerful task engine, which automates the execution of steps in the workflow once it is triggered by an underlying application system or database.



A GUI design and management environment used for developing tasks and approval workflow processes, the Kinetic Task 3.0 Task Builder can create and coordinate an unlimited number of tasks and approvals for true enterprise-wide BPA.

Originally designed to automate processes triggered within an IT service management environment such as BMC Remedy, Kinetic Task 3.0 now works with virtually any application system or database, which means it can more easily be extended to HR, facilities management, sales and marketing, finance, logistics and operations, customer service, and other areas.

For example, HR can automate new-employee onboarding, a process that for most enterprises consists of a dozen or more manual and semi-automated steps involving IT and facilities provisioning, internal or external payroll and benefits management systems, and other internal or external functions. Using Kinetic Task, an HR administrator can easily configure those steps in a task tree and instruct Task to monitor the log files of a human resource management application database. When records are created or changed, the Kinetic Task engine triggers the automated workflow and "talks" to the other application systems involved, whether internal or hosted by a third-party, to orchestrate the steps in the process; send out email notifications and reminders; and enforce the approval policy required by the company. In other HR examples, Kinetic Task can easily automate employee and contractor moves, adds, and changes while incorporating approvals and adhering to standards.

The same basic pattern can be applied in multiple departments across the business:

- In facilities management, Kinetic Task can standardize and automate routine maintenance tasks and any number of environmental, security, or other building-related processes.
- In sales and marketing, Kinetic Task, can accelerate and automate common marketing tasks, such as event registration and coordination; fulfilling marketing collateral requests; and reducing the time associated with manually creating, updating, and executing marketing materials and programs.
- In procurement, Kinetic Task can automate the routing and approval process, thus helping to control spending and enforce procurement standards.
- In product development, Kinetic Task can automate organizing, prioritizing, and routing tasks and issues to relevant functions within the enterprise.
- In customer service, Kinetic Task can automate service escalation issues—issuing RMAs, sending out replacement products and follow-up surveys, reporting, and coordinating remediation processes to ensure customer satisfaction.
- In finance, Kinetic Task can automate requisition and invoicing activities while enforcing approval processes.
- For companies that perform high-volume processing of statements and invoices, such as telcos, insurance companies, credit unions and banks, Kinetic Task can automate much of the exception handling that today is done manually.

Not every process is worth automating, of course. Some are still too small or ad hoc for a even a simplified BPA approach. But virtually any large enterprise can identify

hundreds of processes in which automation can easily be enabled with tools like Kinetic Task. The cumulative savings in reduced effort and greater efficiency can be tremendous, and real benefits can be delivered to end-users quickly, which is the ultimate goal of agile application development.

Several additional features of Kinetic Task make it ideally suited to the widespread application of BPA across the enterprise. Since processes in Kinetic Task are configured, not programmed, multiple versions of the same BPA workflow containing different types of task branching can easily be created and run simultaneously, allowing business users to experiment with features and variables. (In software development, the technique is called A/B or split testing.) Since Kinetic Task records to the millisecond the time needed to execute and complete a step in an automated workflow, businesses can easily compare the efficiency of different versions and select the optimal approach.

Kinetic Task also benefits from a large library of “task handlers” that allow Kinetic Task to manage users, computers, groups, and other objects in Active Directory or another LDAP-accessed directory service, and interact directly with Amazon EC2; BMC; Google Apps; Microsoft Exchange and SharePoint; Salesforce.com; VMWare VSphere; and other major ITSM, ERP, and hosted applications, making it easy to configure automated workflows within these environments.

Conclusion

Until now, most enterprises have focused on “big“ BPA by automating only those processes that seemed sufficiently important to justify the development effort. Left out of this approach are the thousands of other processes across multiple departments and business units within a large enterprise that could benefit from automation. With Kinetic Task 3.0, an unlimited number of smaller business processes can now benefit from BPA. The results can cumulatively save an enterprise thousands of hours formerly spent on manual processing in IT, HR, sales and marketing, finance, facilities, and other areas, while improving the accuracy and quality of process execution.

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About Kinetic Data

Kinetic Data has helped hundreds of Fortune 500 and government customers—including General Mills, Avon, Intel, 3M, and the U.S. Department of Transportation—implement business service management (BSM) and enterprise request management (ERM) applications aligned with ITIL best practices. Kinetic Data was named “Innovator of the Year” by an independent group of BMC Remedy users, and the company has also been recognized with awards for its superior customer service and support. Kinetic Data serves customers from its headquarters in St. Paul, Minn., offices in Sydney, Australia, and through a network of reseller partners. For more information, visit www.kineticdata.com.

[1] searchcio.techtarget.com/definition/business-process-management

[2] vom Brocke, J.HKVJH & Rosemann, M. (2010), Handbook on Business Process Management: Strategic Alignment, Governance, People and Culture (International Handbooks on Information Systems) (Vol. 1). Berlin: Springer

[3] searchcio.techtarget.com/definition/business-process-automation

[4] en.wikipedia.org/wiki/Business_process_automation