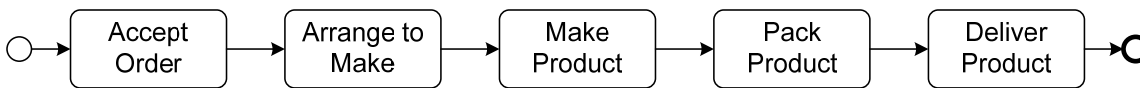# A New Type of Activity

Paul Harmon
Executive Editor
BPTrends
www.bptrends.com

Nearly everyone is familiar, at this point, with the Business Process Management Notation (BPMN) representation of an activity: a rectangle with rounded corners. Using this notation, we could describe a simple process as follows:


For many purposes, this notation works just fine. In some cases, when working with business managers, however, I find it useful to add a bit of adornment to highlight certain facts. In the first edition of *Business Process Change*, I suggested three types of situations that analysts defining high-level processes might want to highlight:

1. A process rectangle with a regular border is the default. It either means we don't know or care how the process is performed, or it means that the process is performed manually by an employee.

2. A process rectangle with a bold border indicates that the process is performed by a software application or by a machine of some kind.

3. A process rectangle with a dashed border indicates that the process involves a mix of manual and computer or machine efforts. Thus, an employee might use a computer to enter the new order, or an employee might use a computer controlled machine to machine a new part.

I've used these three types for several years and always found them satisfactory. Consider our simple example. In variation 1, below, the employee who takes the order enters it into a computer. A software system then takes the new entry as an input and schedules the manufacture of the desired item, which is done by a machine that is tended by employees. Employees pack the product and other employees deliver the product.

Variation 1
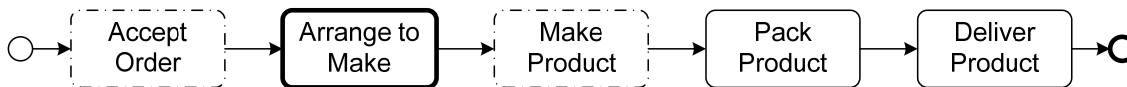
Or consider another variation. In this case, the customer signs onto a website and creates the order. Another computer system schedules the manufacture of the item which is, again, done by a machine tended by an employee, etc.

Variation 2
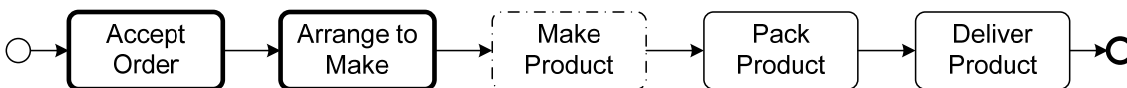
Specifying the type of sub-processes or activities that make up a process isn't always necessary. Often, it is impossible because you are working at such a high-level of abstraction that you won't be able to get specific about how things are done until you drill down into sub-sub-processes.

In some cases, however, identifying the type of a process or activity can be very useful. Too often, IT or business analysts seem to assume that a process is just a set of activities waiting to be automated. It's sometimes useful to tell them that they don't understand a process until they are at least at a high enough level of abstraction that they can see some of the sub-processes that are not automated. Put a different way – all important processes include sub-process performed by people! Any diagram that only shows activities to be automated is probably so far from the concerns of managers or customers that it wouldn't be a view that managers or customers can relate to, at all. And that, in turn, means our analyst won't be able to define good output measures – the analyst won't be able to "Hear the Voice of the Customer" as our Six Sigma friends would say.

These issues have become more urgent in the past couple of years as I have increasingly found myself working with service processes, customer processes, and management processes, which are all heavily human-centric.

Thus, I was intrigued when I came across a vendor at the recent Gartner conference that was highlighting a new type of process on their diagrams. The vendor was EMC. The product is their EMC Documentum BPM Suite – a BPMS product. Since then, I reviewed their documentation so I could study the activity type in a bit more detail. I assume the idea originated with ProActivity Software, a BPM vendor acquired by EMC in 2006. Other BPMS or modeling vendors may support this type of activity, but this is where I first encountered it and it's the first time I've seen it treated as a unique type of process on a BPMS diagram.

The specific activity type describes a situation in which people will collaborate to create an output or reach a conclusion that can not be precisely specified in advance. EMC calls the activity type an "e-room" to reflect the fact that when an input is made to the activity, any of several employees associated with the activity can create a web dialog which focuses on creating the desired output.

If we were to define some of the activities that make up an "e-room" process, we would find activities like: Name project, identify who should be involved, send emails inviting people to e-meeting, define steps in project, define roles for team members in project, etc.

"E-room" makes sense in the context of the EMC Documentum product. For my purposes, however, I want to step back from the implementation details and focus on the generic activity involved. Thus, with a nod to EMC and Documentum, I propose to rename the activity type and call it a "collaboration" activity. In fact, I'll be referring to a lot more than collaboration. I'll be thinking of a collaboration activity designed to achieve a unique output.

For my own purposes, I propose to highlight the situation on high-level BPMN diagrams by shading the background of an activity rectangle that represents a collaboration activity a very light gray. I'm not going to pin down the border of the rectangle, because I can imagine the activity being done by a committee gathered together by an individual just as well as I can imagine the activity being done by an individual working with a computer and an internet or email application. Obviously, almost any Groupware software would serve the needs of this activity type.

So, imagine a third variation. The order is taken by an employee. The customer has requested that the consulting company assemble a team to help the customer design a new advertisement or to engineer a new software product. The second activity in the process requires a project manager to assemble a team, consider the customer's request, and come up with a proposal. They may begin by discussing who should be on the team and, once the team is assembled, they will determine whether or not it will be possible for the team to create the advertisement or engineer the product the customer desires, within the time frame and cost constraints imposed by the customer.   The third activity will vary, depending on the outcome of the "design activity" and may not even occur if the team decides the project isn't feasible.

Variation 3
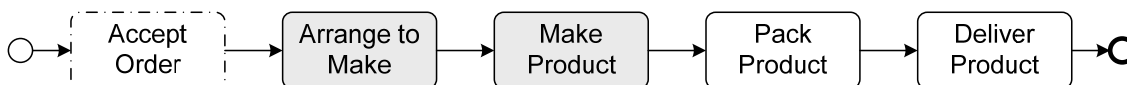
In other words, we don't know if the "Arrange-to-Make" sub process will have an outcome, and we certainly cannot specify exactly what the output will be. We can create a high-level process diagram that describes the generic process we go through to create ads or engineer new products, but we can't define exactly what we will do in each specific case.

Clearly, this type of activity has always existed. In the past, I would have simply indicated that the activity was done by employees. Increasingly, as we move beyond back office processes and into interactive or collaborative processes, we will probably find it useful to discriminate between the following:

- Routine activities that are performed by employees and which can be precisely defined in advance.
- Creative or collaborative activities that are performed by individuals or teams and involve creating the exact subprocess to be followed and then creating outputs that cannot be defined in advance.

Obviously, there have always been creative or collaborative activities. Many readers of BPTrends will have read one or more of Keith Harrison-Broninski's articles during the past year. Keith is very focused on collaborative processes that require people to network to find unique solutions. He even suggests a unique notation that can be used to capture collaborative activities. I've never thought that was necessary and suggest that the adornment to BPMN that I've suggested here will suffice. However one approaches it, analyzing and documenting creative or collaborative processes gets more important every day.

This isn't a concern that will typically confront IT analysts. If it takes a team of creative people to analyze a problem, then it isn't an activity that's likely to be automated any time soon. It might well be supported by software – in the form of Groupware or by a BPMS product that provides for flexible activities within the overall context of a high-level process diagram -- but the essence of the activity is that people solve a problem that can't be precisely defined in advance.

Obviously, part of the solution is to get better at defining generic processes – e.g. the overall process of generating a new advertisement – to enable us to automate any part of the process we can, leaving only the creative parts for people. Similarly, we can build better Groupware software to help creative people structure their interactions and capture information they develop as they work.

One way to start is to clearly recognize the nature of the activities that make up a given process, knowing where certain analytic techniques are appropriate and recognizing where we are dealing with complexities that call for a more flexible or creative effort on the part of the process analyst.

I think EMC Documentum's "eRoom" process constitutes a recognition of an increasingly important aspect of process design and look forward to seeing how other BPMS vendors incorporate support for creative or collaborative activities in their tools.

ABOUT PAUL HARMON

Paul is a Co-Founder, Executive Editor and Market Analyst at BPTrends, (Business Process Trends), the most trusted source of information and analysis on trends, directions and best practices in business process management, (www.bptrends.com). He is also a Co-Founder, Chief Methodologist and Principal Consultant of BPTrends Associates, a professional services company providing executive education, training and consulting services for organizations interested in understanding and implementing business process management. He has worked on major process improvement programs at Bank of America, Wells Fargo, Prudential and Citibank, to name a few.

Paul is the Co-Author and Editor of the *BPTrends Product Reports*, the most widely read reports available on BPM software products and the author of the best selling book, *Business Process Change*: *A Manager's Guide to Improving, Redesigning and Automating Processes.* He is an acknowledged BPM thought leader and noted consultant, educator, author and market analyst concerned with applying new technologies and methodologies to real-world business problems. He is a widely respected keynote speaker and has developed and delivered executive seminars, workshops, briefings and keynote addresses on all aspects of BPM to conferences and major organizations throughout the world. BPTrends Associates is partnered with Boston University to develop and deliver the BUCEC BPM Curriculum and Certification Program.