Making Social Mean Business
Speakers

Sandy is an independent analyst, application architect and blogger, specializing in business process management and Enterprise 2.0. Currently, she practices as a BPM analyst and architect, performing engagements for end-user organizations and BPM vendors. She also writes the popular “Column 2” BPM blog at www.column2.com, is a contributing author on other business and social media-related blogs, and has been a featured speaker on BPM and its impact on business at conferences and customer sites in several countries.

Emily heads Pega’s cross-industry case management initiatives, driving product marketing and strategy. She spends a significant portion of her time working with clients, and analyzing market trends. Using these inputs she identifies key innovation areas to ensure Pega maintains its stance as the leader in dynamic case management in terms of product, methodology and delivery of case applications. Emily joined Pega in February of 2008. Prior to Pega, Emily worked at TIBCO driving BPM product marketing.

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Making Social BPM Mean Business

Using BPM, social tools and case management to boost productivity and worker empowerment

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Agenda

- The changing nature of work
- Dimensions of process: structured to unstructured, controlled to social, internal to external
- Getting started with social processes
The Extremes Of Work

Routine Work

Knowledge Work
Goals Of Work Types

Routine Work
- Efficiency
- Accuracy
- Process improvement
- Automation

“Classic” BPM

Knowledge Work
- Flexibility
- Assist human knowledge work
- Collect artifacts

Adaptive Case Management (ACM)
Characterizing The Extremes

Routine Work
- A priori process model
- Controlled participation
- Automatable, especially with service integration, rules and events

Knowledge Work
- No a priori model
- Collaboration on demand
- Little automation, but guided by rules and events
Dimensions Of Work

- Structured to unstructured
- Controlled to collaborative
- Internal to external participation
Structure Spectrum

Structured
• e.g., automated regulatory process

Structured with ad hoc exceptions
• e.g., financial back-office transactions

Unstructured with pre-defined fragments
• e.g., insurance claims

Unstructured
• e.g., investigations
Collaboration Spectrum

Predefined participants
- Each task in process assigned to specific roles/participants at design time or instantiation

Select from predefined set of participants
- e.g., send to colleague for assistance

Select any participants, or participant self-selection
- e.g., social production

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External Socialization Spectrum

- **Internal only**
  - All tasks in process completed by internal resources
- **Expose status to external**
  - e.g., send milestone alerts to customer
- **Include external in process**
  - e.g., route task to trading partner for completion
Challenges

- Hybrid models that include all work dimensions
- Runtime UI for defining processes and adding participants
- Management of unstructured and collaborative processes
- Cultural shifts required by IT, business users and management
Getting Started With Social

- Enable inherently social tasks in existing processes
  - Add social tools (process platform or 3rd party)
  - Foster trust and empowerment in workers

- Identify opportunities for additional collaboration

- Move highly collaborative processes to social platforms
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Social Tools and Business Applications
Agenda

- Social: the key to customer-centricity
- Case management: bringing BPM and social together
- Empowering workers with social tools
- 3 easy ways to get started
- Why social tools will change the way you run your business
The Center of the Universe
Social Tools to See with your Customers’ Eyes

▶ Internally:
  – Social tools can help to give a complete picture of a customer’s work
  – Empower workers to collaborate on cross-functional customer requests

▶ Externally:
  – Monitor customer sentiments, and harvest customer commentary
  – Use social networks to better understand your customers
    • Linked in
    • Facebook
Case Mgmt: A Platform for Social and BPM

Dynamic Case Management

Extremely Structured

Spectrum of Work

Unstructured and Ad Hoc

System

Clerical Worker

Knowledge-Assisted Worker

Knowledge Worker
Case as “Collaboration Space” & Process “Consumer”

Collaboration

Case Data

Processes & Dependencies

Case Content

Ad Hoc Tasks

Sub-Cases

Case Business Objectives

Rules and Policies

Case Business Objectives

Ad Hoc Tasks

Sub-Cases

Case Content

Processes & Dependencies

Case Data

Collaboration

Case as “Collaboration Space” & Process “Consumer”
Empowering Workers with Social Tools

Customer-Aware
Empowering Workers with Social Tools

Customer-Aware

All of the data
Empowering Workers with Social Tools

All of the work

Customer-Aware
Empowering Workers with Social Tools

All of the work

Customer-Aware
Empowering Workers with Social Tools

Powerful internal networks
Empowering Workers with Social Tools

Powerful internal networks

Collaborators
Empowering Workers with Social Tools

Get help!

Powerful internal networks
Empowering Workers to Perform Ad Hoc Work
A World of Social Possibilities
3 Easy Ways to Get Started

Embedding Applications in Facebook

Case Communities

Tagging
## Case Communities

<table>
<thead>
<tr>
<th>World</th>
<th>External participants</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>All of the people in the organization</td>
</tr>
<tr>
<td></td>
<td>All of the people within the organization who work on cases of this type</td>
</tr>
<tr>
<td></td>
<td>All of the people who have or will perform work on any sub-case within the case</td>
</tr>
<tr>
<td></td>
<td>All of the people who have or will perform work on the sub-case</td>
</tr>
<tr>
<td></td>
<td>Individual person working on a single task within a single sub-case</td>
</tr>
</tbody>
</table>
Case Communities
Exposing Apps in Facebook

UServ Financial » Get an Auto Quote today!

Gender
Soni Garg

Marital Status
Female
Married

History of DUI
No

License Number

Premium Estimate
$300.00

Your Facebook Profile indicates that you are Married.
Would you like to add your Spouse, Salil Garg, as a Driver?

Yes
No

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Why Social Tools will Change the way you Work

- Empowered, Self-Organizing Workers
- Design-by-Doing: Real-time Crowd-Sourcing of Applications
Thank You!

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