Business Process Management and Workflow are, by their very nature, social activities. The collaboration and communication patterns that are now increasingly referred to as "social computing" were also fundamental to the BPM and workflow models of the early 1990s. Yet it has been the recent explosion of social computing and accompanying success of social production, from Linux to Wikipedia, and Facebook to Twitter, which have had the most dramatic impact on collaboration in business environments.

Today we see the transformation of both the look and feel of BPM technologies along the lines of social media, as well as the increasing adoption of social tools and techniques democratizing process development and design. It is along these two trend lines; the evolution of system interfaces and the increased engagement of stakeholders in process improvement, that Social BPM has taken shape.

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• The Quantum Organization: How social technology will displace the Newtonian view
• The Role of Trust and Reputation in Social BPM
• Change Management Processes
• How to Link BPM Governance and Social Collaboration through an Adaptive Paradigm
• Leveraging Social BPM for Enterprise Transformation
• BPM, Social Technology, Collaboration and the Workplace of the Future
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• Further Reading: BPM and Workflow
Introduction and Overview: Social BPM

Layna Fischer, Future Strategies Inc. USA

Business Process Management and Workflow are, by their very nature, social activities. The collaboration and communication patterns that are now increasingly referred to as “social computing” were also fundamental to the BPM and workflow models of the early 1990s. Yet it has been the recent explosion of social computing and accompanying success of social production, from Linux to Wikipedia, and Facebook to Twitter, which has the most dramatic impact collaboration in business environments.

Today we see the transformation of both the look and feel of BPM technologies along the lines of social media, as well as the increasing adoption of social tools and techniques democratizing process development and design. It is along these two trend lines; the evolution of system interfaces and the increased engagement of stakeholders in process improvement, that Social BPM has taken shape.

As explained by WfMC Fellow Dr. Michael zur Muehlen, “If you only focus on streamlining process execution and making it as efficient as possible the social aspect diminishes. But if you consider process discovery, the development of a shared understanding of what your operations look like, and monitoring your process environment, then social plays a big role. Social is all about providing context, a rich environment of data points that a streamlined workflow would be lacking otherwise. The challenge is to make this context useful, both from a social networking perspective and from an unstructured data perspective.”

This books brings you thoughtful and insightful viewpoints from experts worldwide on Social BPM and the role it can play in your own organization.

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THE QUANTUM ORGANIZATION: HOW SOCIAL TECHNOLOGY WILL DISPLACE THE NEWTONIAN VIEW 19
Keith D Swenson, Fujitsu America, USA

We find ourselves standing on the crux of a change so profound that it will affect every aspect of our working lives. It is a change in the very way that we think about organizations and how people interact within organizations.

While this book is about technology that is used in the workplace, the root of the change is not a technological one. It is a change in how organizations work. The old way of viewing the workings of an organization was founded in the revolutionary ideas of Newton and Descartes, which brought about organizational structure in the Industrial Revolution. But Industrial Revolution ideas are being replaced by Information Revolution ideas, and management is feeling a crisis similar
to that felt by physicists when the Newtonian view of the universe was replaced by
a quantum view of the universe. We can use this shift in the field of physics as a
parallel that illustrates the same kinds of changes that management science and
information technology are seeing today.

THE ROLE OF TRUST AND REPUTATION IN SOCIAL BPM

Nathaniel Palmer, SRA International, Inc., USA and Executive Director,
WfMC.org

Trust and reputation hardly play any role at in the command-and-control world of
process automation. A control flow token travels down a predefined path from one
node and another, and with passes control without bias or prejudice. Often a
manager sits detached from front lines, and ‘load balances’ by shifting from one
queue to another. Social BPM is not defined by a command-and-control automa-
tion paradigm, but a far more fluid series of negotiations between individuals, and
searches for ideal collaboration candidates. In the BPM software world, however,
there are few direct parallels to accepted social media factors for developing and
developing a favorable online reputation. This chapter will explore the role which
trust and reputation currently play in the business environment, how this can be
leveraged and optimized in today’s existing BPMS environments, as well as specif-
ic examples of the emerging capabilities and recent innovations that are ushering
the era of Social BPM.

CHANGE MANAGEMENT PROCESSES

Keith Harrison-Broninski, Role Modellers, UK

A mainstream project management approach does not allow the patterns com-
mmon to different change processes to be identified and improved, and neither the
workflow-based nor the case-based approach to process definition is applicable to
change management. In the flowchart-centric model of the workflow-based ap-
proach, processes are considered to be a sequence of steps governed by branch
points and conditional loops, in which exceptional cases are handled by spawning
new discussion threads on demand. This places the human interactions that are
critical to change management outside of the process itself. In the document- and
decision-centric model of the case-based approach, processes are not structured
in advance, but carried out ad-hoc according to the judgment of the skilled know-
ledge workers involved, optionally with the aid of business rules to check com-
pliance. This does not provide enough structure to plan and resource high-level
work such as organizational change, or support work that crosses organizational
boundaries.

This paper explores a process description approach, Human Interaction Man-
agement (HIM) which provides the means to integrate both workflow- and case-
based approaches into simple, high-level work processes based on business-
oriented principles (effective teams, structured communication, building know-
ledge, effective use of time, and dynamic re-planning).

HOW TO LINK BPM GOVERNANCE AND SOCIAL COLLABORATION THROUGH AN ADAPTIVE PARADIGM

Max J. Pucher, ISIS Papyrus Software, Switzerland

Social BPM, which—like BPM itself—still lacks a congruent, accepted definition, is
mostly understood as being an orthodox BPM product that has some add-on so-
cial collaboration facilities such as Twitter-like chat. Users access publicly availa-
ble profiles that can be used during analysis or design time as well as during
process execution. This kind of social collaboration consists mostly of real-time text messages linked to the context of the activity being performed or hyperlinks that point to activity resources such as documents.

What raises the interest in Social BPM? The people empowerment of social networking is understood as an evolution of what was called Web 2.0 and named Enterprise 2.0 by Andrew McAfee. It provides enablement for communication and collaboration to non-technical people. This potential of the Internet has already been described in the cult book ‘The Cluetrain Manifesto’ coinig the phrase: ‘Markets are Conversations’ (Locke 2000). It predicted that marketing will cease to be a pure B2C activity to also include C2B and more importantly C2C communication.

**LEVERAGING SOCIAL BPM FOR ENTERPRISE TRANSFORMATION**

*Sandy Kemsley, Kemsley Design Ltd., Canada*

Social BPM is gaining recognition as a driver of knowledge worker productivity. But what is social BPM, and how does it compare with the more general classes of social business applications? How can social BPM be used as part of an overall enterprise transformation initiative?

This white paper explores the drivers behind social BPM, and provides insights into its four main manifestations: collaborative process discovery, runtime collaboration, process event streams, and BPM communities. It also discusses the network effects that fuel the expansion of social BPM, acting as a catalyst for transformation of an enterprise’s processes, performance and work culture, and finishes with a number of best practices for adopting social BPM within your organization.

**BPM, SOCIAL TECHNOLOGY, COLLABORATION AND THE WORKPLACE OF THE FUTURE**

*John Flynn, Process Tech Ltd., UK*

For many customer-centric organizations, the last three years have been tough. Shrinking volumes of business, stiffer competition and ever more demanding consumer expectations have increased pressure on the bottom line. Companies have responded by reducing headcount, cutting back on unnecessary spending and ‘making do’ with existing IT systems and infrastructure. While these reactions have stabilized corporate finances and brought sighs of relief from shareholders, a siege mentality in the long term will not allow organizations to take advantage of the predicted ‘better times ahead.’

Taking into account the shifting power base from West to East and the genuine emergence of the Global Economy, the future now looks very different from the past. Companies that would traditionally ride out an economic downturn by battenning down the hatches until the storm blows over, may find that when they emerge from their entrenchment, they are ill-equipped to capitalize on the changing world around them. This chapter takes a look at the changing nature of consumers and the workplace, and how BPM and associated emergent technologies will play a part in shaping the companies of the future.

**A MODEL-DRIVEN APPROACH TO SOCIAL BPM APPLICATIONS**

*Piero Fraternali, Marco Brambilla, Carmen Vaca, Politecnico di Milano, Italy*

Social technologies have transformed the Web from a platform for passive content consumption to a place where users actively contribute to content production and opinion making. The first-generation social tools, like blogs, wikis, and content sharing applications, have been followed by a second generation of solutions spe-
cifically focused on interpersonal interaction. Social networks are intended primarily for people to meet virtually and establish networks of relations. Several variants of the concept exist, from general purpose platforms like Facebook and mySpace, to location-based social applications like Gowalla and Foursquare, to special purpose networks, like Plaxo and LinkedIn.

The diffusion of the original Web quickly impacted professional use, pushing companies to migrate most of their B2C, B2B and B2E applications to a Web/SOA architecture and employ browser-based interfaces in the work place, together with the advent of the Social Web affecting business practices. Several examples of this trend are visible: professional networking platforms have started being used by the HR departments of companies as a tool for recruiting and skill search; brand management and marketing use the viral dissemination power of social networks to test or promote products and services; Customer Relationship Management exploits enterprise blogs and social network communication (e.g., product news twittering) to install a multilateral dialogue with customers.

**HOW SOCIAL TECHNOLOGIES ENHANCE THE BPM EXPERIENCE FOR ALL PARTICIPANTS**

*Steve Russell, Global 360 Inc., United States*

With the broad adoption of social sites such as Facebook, LinkedIn, Twitter and Foursquare, social computing is defining how a new generation of internet participants are finding and communicating with friends and business associates. Whether connecting with high school classmates, finding hotel recommendations or getting advice on how to repair a mobile phone, social networking tools and sites have created a level of personal connectivity and access to crowd-sourced information that has dramatically changed how we go about our daily lives.

Social computing has begun to make inroads into the business world as well. Today LinkedIn manages information on more than 100 million registered users making it the predominant directory of business professionals in the world. Many companies are using Facebook as a platform for letting employees profile themselves and their work, thus making it easier for others in the company to connect with colleagues with similar interests and occupations.

The success of these social applications stems from the pioneering work that these applications have done to make it easier for people to connect with one another and to share information. As they reached critical mass, even more people embraced the technology and made it a common and familiar way for people to interact. As a result, social capabilities historically associated with pure social applications like Facebook and LinkedIn are being demanded within business organizations. Social applications such as Plaxo and Yammer are specifically targeting the enterprise market. This trend is likely to continue.

**VOICE OF THE NETWORK THROUGH SOCIAL BPM**

*Dr. Setrag Khoshafian, Patrick Tripp, Steve Kraus, Pegasystems Inc., USA*

February 11, 2011 will be remembered as the day a thirty-year old dictatorship was relinquished ... enabled by Facebook! It was social networking that facilitated the mass communication, information exchange, mobilization, and instigated an unprecedented revolution. In business, entertainment, politics, and almost every facet of life there is a new re-energized “voice.” This voice cannot be constrained within any existing structure or organization. It is a powerful voice that is changing societies throughout the world. It is a voice that is making and breaking businesses. Reputations rise and fall because of this voice. It is a voice that is leveraged by organizations and individuals alike to create and promote unique
brands. It is unstoppable and robust. It is the voice of networked communities, often created in an ad-hoc fashion, united through a common interest and made possible through the use of social media.

**Evidence-Based Service; Listening to Customers to Improve Customer-Service Processes**

**Vikas Nehru, Ajay Khanna, KANA Software, USA**

Every customer interaction, including sales and service, must reflect a company’s brand. However, it is quite a challenge to measure the effect which customer service has on a company’s brand. It is required that the customer service processes are aligned with the brand to ensure that the customers receive service which meets the expectations generated by the brand.

The company must possess the ability to measure the effect of each service interaction on brand perception and customer service KPIs. Some of these KPIs are easy to identify as they are based on interactions within the organization’s self-service or agent assisted service processes. But the interactions that are happening out in the social media world can also tell a lot about the company and how it is perceived by the consumer. Companies today need to be able to establish KPIs related to social media or social-assisted service in order to remain a competitive brand in today’s economy.

Evidence-based improvement utilizes experimentation and rigorous measurement, and has the potential to allow customer service organizations to determine how each type of customer interaction affects the service process and your brand. By deliberately changing and testing a service process and then re-measuring its impact, the organization can discover the optimum process to satisfy customers and reinforce brand while still meeting company KPI objectives.

This paper will discuss how process management, social monitoring, customer feedback and analytics come together to provide customers with an unprecedented service experience.

**Taking Channel and Distribution Management Social and Contextual**

**Dr. Ram Ramdas, Herald Logic, India and Jay Pullur, Qontext Inc., USA**

This paper presents the authors’ ideas and experiences about “social enabling” of channel management/distribution management processes for large distributed multi channel retail oriented distribution networks. The paper makes a case for making structured business processes within the context of enterprise software applications more effective by social enabling and contextualizing the collaboration needed for these business processes. Business processes like on-boarding of direct and channel sales force, sales training, performance management, compensation management, schemes and promotions management and payout dispute resolution can be made far more efficient and effective by combining the structured business workflows within the Business Software applications with “social enablement” tools like discussions, documents, tweets, polls, surveys within the context of the business process itself. These improved efficiency and benefits tell us that the future of Channel and Distribution Management is Social.

**Social Technology Makes the World a Better Place: Pro Bono BPM**

**Annelize Booysen, PhD and Michélle Booysen, PhD, PMP, Pétanque Consultancy, South Africa**

The cost element of a pro bono project is key when deciding whether to move ahead with the project, or not. This paper looks at the way in which technology
enables a company to provide pro bono services at a much reduced cost, anywhere in the world, while adding to the desired efficiency enhancement outcome of a BPM project.

A non-profit organization in Bangkok needed professional guidance to help them attain their goals. Pétanque Consultancy, a Cape Town based firm specialising in the mapping of processes in storyboard format and applying their interactive, social BPM methodology, offered pro bono strategic planning, process mapping and implementation guidance. The fact that two oceans and three time zones separated the client from the consultants posed little more than scheduling conflicts and has been groundbreaking in how technology has been applied to bring about the early stage benefits intended for the project.

The case study examines the way in which technology has made it easy to contribute to making the world a better place by successfully delivering BPM services that usually requires face to face engagement. It compares the manner in which this project would have been executed twenty years ago, with the way in which it is being executed in the year 2011. It looks at the differences in technology available to the team in 1991 compared to 2011, the difficulties likely to have been encountered with a three-continent project twenty years ago, and most importantly, the costs that would have been involved to achieve the same outcome as the 2011 project. It concludes that technology has significantly added to the outcomes of BPM by providing a vehicle to achieve higher efficiency and effectiveness.

**INTRODUCTION AND OVERVIEW**

**ROY L. ALTMAN MBA, PEOPLESERV, INC., AND KENNETH W. ALTMAN MD PHD FACS, THE MOUNT SINAI MEDICAL CENTER NEW YORK, USA**

Medical professionals diagnose conditions and prescribe treatments based on a process called a clinical pathway. Yet the criteria within the pathway are largely memory-based. There is a need for a system that manages the process and allows the physician to focus on decision-making and patient care. This paper proposes such a system.

The medical industry is undergoing dramatic changes. There is a need to provide quality services while limiting costs, with necessary oversight. Health care workers, ranging from physicians, nurses, therapists and first responders need to make critical decisions based on rapidly changing information (such as evidence-based consensus reports called “clinical practice guidelines” for specific situations). The emerging practice of Adaptive Case Management (ACM) is well equipped to handle this application, in that it assists knowledge workers by providing timely information to make informed decisions in dynamically changing environments.

Medical workers need to keep myriad information about symptoms and possible causes in their heads, and winnow down the possibilities until finally arriving at a diagnosis and treatment plan. Along the way, tests are conducted to validate or invalidate hypotheses. This paper presents a multi-tiered concept regarding the application of ACM and social BPM to medical clinical pathways, and is not a description of a commercial software product.

**A CASE STUDY OF BPM IN A KAIZEN ENVIRONMENT**

**EDWARD ROPER, FORD MOTOR COMPANY, UNITED KINGDOM**

A key challenge in the field of BPM is to get the critical process elements and their interactions into the model. The fact that we are looking at modeling a process often reflects the complexity of the problem that we are investigating. This often
means that there is not one single person who understands the full complexity of the model, so the role of the modeler is to break down the complex process into the simple (understandable) sub-processes. Having achieved this step the modeler then has to integrate these elements to represent the full complexity of the process.

This paper presents a case study of how this was achieved in a specific project. The focus of the paper will be the communication challenges rather than the specific problem. The paper will demonstrate how the simulation system was central to this and played a major part in facilitating remote working and in the development of the model to support process development.

INTRODUCTION AND OVERVIEW

NEXT GENERATION SOCIAL MEDIA: ALIGNMENT OF BUSINESS PROCESSES & SOCIAL INTELLIGENCE

Vinaykumar. S. Mummigatti, Virtusa, USA

As enterprises try to catch up with the social media buzz, many companies are starting to realize that it is difficult to define tangible business outcomes around social media investments. Social intelligence and social analytics are new concepts which have the potential to help enterprises move beyond basic marketing and define a goal-oriented strategy around social media.

The next wave of social media investments will be in enterprise programs that are designed to facilitate participation in social media interactions, analyzing the data generated and taking real time actions that govern product, marketing, distribution and pricing processes.

Certain emerging trends in technology such as the collaboration between social media and mobile technology providers have created a revolution in the adoption rate of social media. The confluence of social media and mobile technologies is creating upheaval not just in competitive dynamics but also across social and political spheres. The focus of this paper is to enable organizations to define a strategy around Social Media and tie it to measurable outcomes as defined by core processes that are critical to the survival and growth of any enterprise.

NEXT GENERATION BPM SUITES: SOCIAL AND COLLABORATIVE

Manoj Das and Linus Chow, Oracle, USA

In recent years, the world of communication has undergone dramatic transformation driven by the convergence of three factors: faster and cheaper infrastructures, new business models including cloud computing, and ubiquitous delivery channels. The Internet is not only always on, but it is on pervasively through a plethora of devices, and it is on in ‘edit’ mode. This has driven mass adoption of blogging, micro-blogging, and sharing of news, opinion, and status, which in turn has driven the creation of online communities and social networks. Today, tweeting on Twitter and sharing status on Facebook have become mainstream activities. While the social technologies are broadly adopted across all demographic profiles, the biggest impact is seen on the young generation, which is being commonly called the Facebook generation.

While social technologies have exploded in the personal sphere, leveraging these technologies in the commercial sphere is still in the infancy and primarily limited to customer interactions for support or marketing. Management of business processes has historically been a very collaborative and knowledge intensive discipline and is a natural target for application of social technologies. The convergence of social technologies with business process management, called Social BPM, holds the potential of not only dramatically simplifying and enhancing
process discovery and management but also improve the process of collaboration itself.

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- Society for Information Management
  http://www.simnet.org
- Wesley J. Howe School of Technology Management
  http://howe.stevens.edu/research/research-centers/business-process-innovation
- Workflow Management Coalition (WFMC)
  http://www.wfmc.org
- Workflow Portal
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