



# Working with Business Processes Masterclass

Aligning Process Work with Strategic, Organisational, and Cultural Factors

Three day workshop  
by Alec Sharp

**AdeptEvents**

- Five things you need to know about business processes
- Developing a Process Architecture with top-down and bottom-up techniques
- The critical role of Concept Models in working with business processes
- Seven ways to help people embrace change
- Implementation of the new process, feature-by-feature
- Process design case studies

#### VENUE

Utrecht / Hilversum, The Netherlands

#### TIME

9:00 – 17:00 hours

#### FORMAT

3 days in person / 5 half-days virtually

#### REGISTRATION

[www.adeptevents.nl](http://www.adeptevents.nl)

The Data Modelling workshops by Alec Sharp are a natural companion to this course with techniques that complement the material covered in this course.



# Working with Business Processes Masterclass

## Aligning Process Work with Strategic, Organisational, and Cultural Factors


There is a worldwide resurgence of interest in Business Processes because all value delivered by an organisation – every product or service – is the result of an end-to-end, cross-functional, Business Process. This three-day, highly interactive workshop provides a proven, Agile methodology for Business Process Change, with an emphasis on practical, repeatable techniques and guidelines. It combines the core content from two popular workshops by Alec Sharp – Working With Business Processes and Advanced Business Process Techniques. This structure has been extremely well-received – it quickly gets everyone, whether new or experienced, to the same baseline on Clariteq's unique, Agile, and ultra-practical approach to Business Process Change. On this platform of shared understanding and techniques, the entire group moves forward into advanced topics, well beyond what is covered in introductory courses.

First, the workshop demonstrates how to effectively communicate Business Process concepts, how to discover a business process, scope it, assess it and establish goals, and how to model it with progressive detail. Then, it shifts to advanced topics – specific, repeatable techniques to develop a process architecture, encourage support for change, and complete a feature-based process design.

The emphasis is always on ensuring Business Process initiatives are aligned with human, social, and political factors, organisational culture, and enterprise mission, strategy, goals, and objectives. Participants will be well-prepared for the challenges of successful Business Process Change. In fact, many organisations apply techniques learned in this workshop to all their organisational change initiatives. Real-life case studies are employed throughout – some participants say the







examples of how the techniques are applied in practice is the best part of the workshop.

### Learning objectives

- Understand how to communicate business process concepts with executives, managers, and individual contributors in a way that stimulates interest and builds support for change
- Learn objective criteria for an end-to-end process along with top-down and bottom-up methods for discovering business processes and rapidly developing a process architecture
- Understand, through extensive real-life examples, how a concept model (conceptual data model) is invaluable in identifying and understanding business processes
- Learn how to encourage support for business process change at every stage of an initiative, and the critical importance of a “what first, who and how next, only then why?” approach
- Learn a practical and agile business process change methodology that incorporates specific techniques for addressing human, organisational, and cultural factors
- Be able to apply innovative techniques for rapidly building relevant, accessible process models, especially at the scope (context) and conceptual (understanding) levels
- Manage the transition from the current process to the future state process by conducting a structured assessment of the as-is that generates ideas and features for the to-be process

- Learn a step-by-step, feature-based method for to-be process design that utilises proven techniques to ensure an implementable, sustainable design
- Understand how the feature-based approach allows implementation of the new process in an Agile, feature-by-feature manner rather than a “big bang” approach.

### Target Audience

Business professionals with responsibility for improving their processes and business analysts needing solid techniques will both benefit from this workshop. Specifically, anyone involved in Business Analysis, Business Change, Business Architecture, and Business Process Management (BPM) especially BPM professionals, Process Analysts and Designers, Business and Process Architects, Business Analysts, and Project / Programme Managers. Also, Business Managers and Subject Matter Experts responsible for effecting process change, Organisation Development professionals needing to learn more about business processes, and anyone involved in process-driven solution development.

### Course Topics

Practical techniques and clear guidelines will be provided in these areas:

- Five things you need to know about business processes
- How Business Process fits into a framework for Business Analysis: Process – Application – Data
- A three-phase methodology for Business Process Change
- Identifying true, end-to-end, cross-functional Business Processes
- Developing a Process Architecture with top-down and bottom-up techniques
- The critical role of Concept Models (Conceptual Data Models) in working with business processes
- Conveying the essence of a process with Process Scope Models and Process Summary Charts
- Seven ways to help people embrace change
- Process modelling for people, not machines
- Enabler-based assessment of the as-is process and generation of ideas for the to-be process
- Designing for success – creating an implementable and sustainable business process
- Implementation of the new process, feature-by-feature
- Process design case studies.



## Detailed Course description



## Working with Business Processes Masterclass

### 1. Communicating the fundamentals of *Business Processes*

- Introduction – instructor and course background, themes and overview, participant introductions
- Building a presentation on “Business Process” – for executives and everyone else
- Why you should never assume everyone agrees “what is a process?” or that “process is good”
- Why you should never preach or oversell Business Process Management
- Why people fear “process,” and how to overcome this fear
- Five key points you must convey in a briefing on Business Process
- Confusion on what is meant by “business process,” and the impact on process improvement
- Michael Hammer’s legacy – “functions,” “processes,” and the terminology we all use today.
- The most common source of confusion – “process” vs. “procedure”
- Levels of detail and perspectives – process domains, individual processes, activities, procedures
- Hammer’s legacy – understanding functional (who) and process (what) perspectives
- Case study: real-world (and expensive!) impacts of incorrectly identifying business processes
- A critical concept in all business process analysis – separating the “what” from the “who and how”
- The “TRAC” framework for clarifying “what” the process is – Trigger, Results, Activities, Cases
- The “Process Scope Model” and “Process Summary Chart” – “what” first, “who & how” later
- Types of Triggering Events and types of Final Results
- Why “input-process-output” is often a terrible framework for process work
- Real-life examples - clarifying “what” vs. “who & how” helping people embrace change
- How Process Scope Models and Process Summary Charts organize more detailed analysis
- The many benefits of using Scope Models and Summary Charts to avoid premature detail
- Simple process naming standards make all the difference
- Case study – how the naming standards helped a university identify real business processes
- Case study – how a Scope Model and Summary Chart helped execs see the need for change
- The good and the bad: why functionally based organisations are a good thing, and why functionally based organisations introduce process difficulties

- Why functionally based performance measures and reward systems may be the biggest obstacle
- The critical role of Business Process in purchased or bespoke system implementation
- Common factors in successful and unsuccessful system implementation
- Understanding the six enablers of a business process
- Using as-is process mapping to support an enabler-based assessment of the as-is
- The strategic differentiator – why your process can’t be great at everything
- Case studies – process change failures from not considering the differentiator
- A five-tier framework for relating goals & objectives, business processes, applications, and data
- Recognising three levels of detail – working through scope, concept, and specification levels
- How these levels of detail relate to Agile development – “Concept” is everything!
- A proven and unique methodology for completing a process-oriented project
- How the methodology helps everyone recognise and embrace the need for change

### 2. Identifying true, end-to-end, cross-functional *Business Processes*

- Review of the taxonomy – “Business on a Page” – “Process Area” – “Business Process”
- Depicting Process Areas with a Process Landscape
- Case study – using a structured method to identify “true” business processes
- A bottom-up approach beginning with familiar/recognisable activities
- Applying naming conventions to ensure everyone understands “what” the activities achieve
- Linking activities into chains of activities
- Using TRAC framework - triggers and results - to identify process boundaries within the chains
- Confirming the processes by understanding the flow of tokens through the activity connections
- Summary – six objective guidelines for business processes, and why businesspeople love them
- The connection between Concept Modelling and process discovery
- What next? Simplify “up” and refine “down”
- An important pattern – the “Arc of Modelling & Analysis.” Bottom-up – big picture – top-down

### 3. Developing a *Process Architecture*

- Case study introduction – Process Architecture within tight budget and time constraints

- Two core themes – “use available resources” and “non-invasively” (minimal disruption)
- A multi-pronged approach to discovering Business Processes at enterprise scale
- Why top-down process identification can lead to incorrect results
- Why bottom-up process identification can be more effective
- When and why a blended “meet-in-the-middle” approach can be superior
- Recap: Line of Business (“Core,”) Supporting (“Enabling,”) and Governance processes
- Recap: a proven taxonomy for Business Process Architecture
- “Off-the-shelf” process frameworks and reference models – what they are and are not good for
- Applying Michael Porter’s “Value Chain” – what worked and what did not work
- Identifying Line of Business process areas starting with a generic process model
- Using the Asset Management Life Cycle in identifying Supporting process areas
- Service Maps – a great way to discover the more granular services of each functional area
- Using “Role Profiles” from Human Resources to identify granular activities of each role
- “Meet in the middle” – map granular activities / services to process areas to ID processes
- Case study success! – a four-level process architecture within weeks, not months or years
- Samples from the Line of Business, Supporting, and Governance process categories
- The executive’s favourite – the “Business on a Page” graphic
- Statistics, metrics, observations, and executive reaction to the process architecture
- A less formal approach – developing a process architecture with expert people and a whiteboard
- Using the Process Architecture in a structured approach to planning process work
- Case Study – Using the Process Architecture to assess and support a new service offering
- Using the Process Architecture to determine the impact of “a simple change”
- Using the 6 process enablers to determine what would be needed for the “simple change” to work
- An interlude on the role of Concept Modelling in business process work
- What actually is a Concept Model? – essential components, core principles, sources of confusion
- Clarifying core terminology and building a Concept Model for the new service offering
- Cutting through the confusion and establishing the Business Rules through “assertions”
- Using the Concept Model as a starting point for discovering core application requirements
- An Agile approach to expressing system requirements as Business Services and Use Cases
- Using the Services, Use Cases/User Stories, and Rules to refine the Process Architecture

- Case study outcome – a to-be process workflow used to evaluate the proposed service offering
- More case studies of Concept Models clarifying and supporting process work
- Case study – the role of process modelling and concept modelling in a Big Data initiative
- Case study – using concept modelling to determine if a new process concept is viable

#### 4. Seven ways to help people embrace *Process Change*

- Client thoughts on how a process perspective contributes to any organisational change
- Five approaches that work against encouraging change
- Reference – the leading approaches to organisational change
- Seven specific techniques to build support for process change
  1. The power of “venting” – let people “get it off their chest” – with a case study
  2. *What first, who and how* later – abstraction to the essence, and Essential Models
  3. How to build a compelling and blame-free Case for Change that answers *why?* and a Process Vision that answers *where to?* – with a case study
  4. Clarify what you need to be great at – the process’ *strategic differentiator*
  5. Understand *enablers* – the levers of change and the ones that matter most – with case study
  6. Applying frameworks for assessing culture and its impact on business process design
  7. A modular, feature-based approach to process design to be covered in Section 6
- Applying Force Field Analysis
- Understanding the belief systems of individuals and organisations
- Avoiding unanticipated consequences
- The lowly procedure and its impact on organisational culture

#### 5. *Human-oriented process modelling*

- Basic principles for completing just enough as-is modelling
- Recap of the three basic components – actors, steps, and flow – and terminology variations
- Five reasons (often ignored) Swimlane Diagrams (“Workflow Models”) are so effective?
- Common errors - what *not* to do to ensure your models are as effective as possible
- Examples of what happens when the modeller doesn’t know the factors for successful swimlanes
- How and when to model the “what” (the essence) of a process vs. the “who and how”
- “Scope before flow” – how and why to build a “Process Scope Model” before mapping
- The “Augmented Scope Model” and why it’s often an effective alternative to flow modelling
- Two core principles – (1) “make the flow of work visible” and (2) “simple but not simplistic”
- The cognitive psychology of diagramming – what people first see on a diagram
- When and when not to use BPMN, UML, and other technically oriented approaches



- Guidelines on maximizing readability – stick to boxes and lines, and avoid graphic “widgets”
  - “Flow first, detail later” – a fast approach to building a first-cut flow model and then refining it
  - Using The Three Questions to achieve “flow first, detail later” and avoid common difficulties
  - Two levels of detail in swimlane diagrams – Handoff and Service – with practical guidelines
  - Case study – the surprising amount learned from a minimalist Handoff Diagram
  - When to stop modelling workflow and switch to techniques that are better for detail
  - Knowing if you’ve gone too far and aren’t modelling workflow anymore, and what to do about it
  - Summary – 3 core principles, 5 reasons swimlane diagrams work, and 5 common errors
- 6. A feature-based *Process Design* method – transitioning from as-is to to-be**
- What to do first when you’ve done enough as-is modelling
  - The role of “leverage points”
  - Two common redesign problems, two techniques to avoid them
  - The pivot from as-is to to-be – the structured (and fast!) enabler-based final assessment
  - Capturing more knowledge about the as-is process and generating ideas for the to-be process
  - For each of the 6 enablers – assessment questions, a real-life example, and a client quote
- More enabler examples – conflict within/between enablers, a problem in one surfacing in another
  - Using points in the Assessment by Enabler to generate potential to-be Features
  - (Note a Feature is a significant process change or improvement, or major factor in to-be design)
  - Using Group Brainwriting to collect, reduce, and select 5 to 10 key features of the to-be
  - Avoiding unanticipated consequences – assessing each feature, enabler-by-enabler
  - Examples – implementable, sustainable process via enabler-based assessment of each feature
  - Creating the new process design – realising the to-be features in a workflow model
  - Starting with an Augmented Scope Model to determine the essential to-be activities
  - A critical sequence – *what* the activities are, and only then *who*, *how*, and *when*
  - Building a dependency diagram for to-be activities, then a workflow model for the new process
  - A real-life case study illustrating the methodology
  - A checklist for ensuring the process is sustainable
  - Client observations on the value of a structured approach
  - The contribution of each of the steps in the three-phase methodology
  - A reminder – “process change is a process – don’t skip steps”
  - Job aids for you – a one-page summary of each of the three phases, and a one-page summary of the whole methodology
  - Retrospective – each participant identifies “One Key Point”.



**ALEC SHARP**

**ALEC SHARP**, a senior consultant with Clariteq Systems Consulting, has deep expertise in a rare combination of fields – process modelling, analysis, and redesign; business analysis and requirements specification; and business-oriented data modelling. Increasingly, his work involves facilitation and organisational change. His 35 years of hands-on consulting experience, practical approaches, and global reputation in model-driven methods have made him a sought-after resource in locations as diverse as Ireland, Illinois, and India.

He is also a popular conference speaker, mixing content and insight with irreverence and humour. Among his many top-rated presentations are “The Lost Art of Conceptual Modelling – Where Did it All Go Wrong?,” “The Human Side of Data Modelling – Communicating With Stakeholders and Other Mere Mortals,” “Getting Traction for ‘Data’ – What the Experts Forget,” “Adventures in Reverse Engineering – What You’ve Got, and Why You Don’t Like It,” and “The T-Shaped Data Professional – Achieving Data Management Goals by Other Means.” His 90-minute briefing “Five Things You Need To Know About Business Processes” has been delivered to senior executives at major organisations around the globe.

Alec literally wrote the book on business process modelling, “Workflow Modelling: Tools for Process Improvement and Application Development.” Popular with process improvement specialists, business analysts, consultants, and business professionals, it is consistently a top-selling title on business process modelling, analysis, and design, and is widely used as an MBA textbook. He was awarded DAMA’s Professional Achievement Award, a global award given to one professional a year for contributions to the Data Management profession.

Alec’s popular workshops “Working With Business Processes,” “Advanced Business Process Techniques,” “Business-Oriented Data Modelling,” “Advanced Data Modelling,” and “Requirements Modelling” are conducted on four or five continents each year, at many of the world’s best-known organisations. His classes are practical and energetic, consistently earning “excellent” ratings.

## Information

### DATE AND TIME

The workshop will take place once or twice a year with the exact date and time available on our website. The programme starts at 9:00 am and ends at 5:00 pm on both days. Registration commences at 8.30 am and we recommend that you arrive early.

If we need to run virtual half day sessions, the programme starts at 1:30 pm and ends at 5:00 pm. Please log in well in advance to check your video and audio settings.

### VENUE

Adept Events works with several venues in and near Amersfoort and Utrecht. We strive to provide you with the location details as soon as possible. The exact venue will be on our website and in the confirmation e-mail that you will receive one week prior to the event. Always check our website prior to your departure to ensure you have the exact location and directions.

The virtual seminars and workshops will be offered through a live video stream from our video studio. The virtual classroom is equipped with multiple professional cameras and microphones and we have a two person crew available so that we can offer a similar experience to that of the traditional classroom and, more important, still offer adequate interaction with the speaker.

### HOW TO REGISTER

Please register online at [www.adeptevents.nl](http://www.adeptevents.nl). For registering by print, please scan the completed registration form and send this or your Purchase Order to [customerservice@adeptevents.nl](mailto:customerservice@adeptevents.nl). We will confirm your registration and invoice your company by e-mail therefore please do not omit your e-mail address when registering.

### REGISTRATION FEE & DISCOUNTS

Please find the registration fee and Early Bird discount terms on **this page** on our website.

Discounts are also available for group bookings of two or more delegates representing the same organization made at the same time. Ten percent off for the second and third delegate and fifteen percent off for all delegates when registering four or more delegates (all delegates must be listed on the same invoice).

This cannot be used in conjunction with other discounts. All prices are VAT excluded.

Note: This seminar may also be offered 'Online' or as 'Face-to-face and live streaming'. In that situation, the prices for attending online differ from the prices for attending in-person.

### PAYMENT

Full payment is due prior to the workshop. An invoice will be sent to you containing our full bank details including BIC and IBAN. Your payment should always include the invoice number as well as the name of your company and the delegate name.

**Payment by credit card** is also available. Please mention this in the Comment-field upon registration and find further instructions for credit card payment on our customer service page.

### Cancellation Policy

Cancellations must be received in writing at least three weeks before the commencement of the workshop and will be subject to a € 75,- administration fee. It is regretted that cancellations received within three weeks of the workshop date will be liable for the full workshop fee. Substitutions can be made at any time and at no extra charge.

### Cancellation Liability

In the unlikely event of cancellation of the workshop for any reason, Adept Events' liability is limited to the return of the registration fee only. Adept Events will not reimburse delegates for any travel or hotel cancellation fees or penalties. It may be necessary, for reasons beyond the control of Adept Events, to change the content, timings, speakers, date and venue of the workshop.

### MORE INFORMATION



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### IN-HOUSE TRAINING

Would you like to run this course in-company for a group of persons? We can provide a quote for running an in-house course, if you offer the following details. Estimated number of delegates, location (town, country), number of days required (if different from the public course) and the preferred date/period (month). Please find more info on the **In-house page on our website**.