

## 2-day BPM Specialist Training Class

- Learn global best practices for improving business processes

### Introduction

The Business Process Management (BPM) Certificate Program is designed from global best practices among our 50,000 members. The program covers concepts and technologies for;

- Streamlining and re-engineering
- Requirements gathering and analysis
- Application integration
- Process design and modelling
- Monitoring and process analysis
- Managing change

AIIM represents the Information Management community as the global association for both users and suppliers of Enterprise Content Management solutions – the strategies, services and technologies which enable organisations to capture, manage, store, preserve and deliver information to support business processes. We have provided service for more than 60 years, and are a non-profit organisation.

### Course Development

The course objectives and content is defined and reviewed by AIIM Education Advisory Groups in the US and Europe, representing AIIM's more than 50,000 members. These Education Advisory Groups have subject matter experts from the following companies:

Accenture  
BearingPoint  
Canon  
CCRM Associates  
CMS Watch  
Crown Partners  
EMC  
Fujitsu  
Gartner  
Gimmel Group  
GlaxoSmithKline  
Harris Corporation  
JPMorgan Chase

Marion County Health Department  
Microsoft  
Oracle  
Ricoh  
Royal Mail  
Serco  
Standard Chartered Bank  
The National Archives of UK  
TOWER Software  
US Courts  
US Department of Treasury  
Westminster College  
ZyLAB

The course materials were developed by CMS Watch based on requirements and best practices defined by the above members.



### Course Description

The BPM Specialist course covers global best practices for how to implement BPM. You will learn;

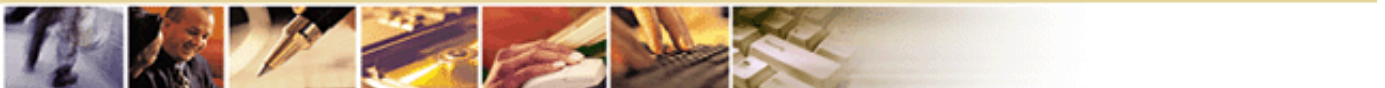
- Planning your project
- How to develop a business case BPM
- Identify and establish stakeholders and project teams
- Gather requirements
- Analyse requirements
- Best practices for process design
- Understand clusters, parallel and sequential processing, natural order, check and reviews, decision making, simplification, and upstream and downstream
- Project advice, pitfalls, and best practices
- Management methodologies including TQM, BPR, Six Sigma, and Lean.

AIIM recommends that you take the BPM Practitioner course before starting the BPM Specialist course to get a good understanding of BPM concepts and technologies.

### Course Objectives:

At the end of this course you will understand:

- The BPM Project
  - Identify the major project stages for process improvement
  - Articulate the differences and relationships between regular project structures and those focused on process change
  - Understand the key outcomes from each project stage
  - Estimate level of effort required at each stage in the context of your enterprise, and be able to plan resources accordingly
- The Business Case for BPM
  - Identify key business scenarios that can be tackled with BPM
  - Determine cost and value categories in your business case
  - Structure a compelling business case for a BPM project
- Stakeholders & The Project Team
  - Select and build a valid BPM project team
  - Understand the customer as a key stakeholder
  - Better manage Stakeholder expectation
- Gathering Requirements
  - Articulate to senior management the central role of requirements gathering in the BPM project process
  - Identify various requirement elicitation techniques, their strengths and inherent drawbacks
  - List the skills required for this stage to maximize your chances for success
- Process Design Practices
  - Understand the limitations of flowcharting processes
  - Ask the right troubleshooting questions and evaluate each step in a process
  - Better manage process “clusters”
  - Develop parallel processing as a solution to bottlenecks
  - Understand the value of “natural” routes and main processes
  - Utilise activity theory in the context of BPM
  - And then make use of:



- Role based routing
- Name based routing
- Groups and Relationships
- Effective Queuing
- Workload balancing
- Implementing Change
  - Understand where implementation fits into the broader picture of process improvement
  - Articulate the value of Proofs of Concepts and Pilot projects
  - Run a proper technology selection process
  - Identify the steps required to ingest new technology -- if needed -- into the enterprise
- Change Management
  - Identify different types of change
  - Contrast technology change with process change
  - Understand the 4 dimensions of organisational change readiness
  - Identify different models for change management
  - Articulate best practices for change management
- Monitoring
  - Understand the value Process Monitoring
  - Identify different metrics to capture and oversee
  - Distinguish On-Demand vs. Automated Reporting
- Management Methodologies
  - Understand the value of utilising an improvement methodology
  - Articulate the key differences among and relative merits of the following approaches:
    - TQM
    - BPR
    - Six Sigma & Lean

### Course Designation

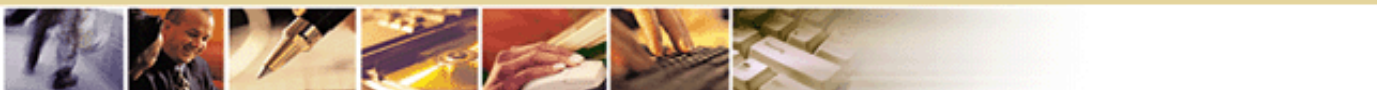
You will be awarded the AIIM BPM Specialist (BPM<sup>S</sup>) designation after passing the online exam. This is a new AIIM standard for industry professionalism and knowledge. By earning this designation, you can call yourself an AIIM BPM Specialist. You can use the associated logo and title on your business card, email signature, web page, etc. The exam is available via the Internet and you must pass it within 6 months of attending the training course.

Benefits of becoming BPM Specialist (BPM<sup>S</sup>):

- Position yourself to be tomorrow's leader by enhancing your business and professional skills
- Learn global best practices for implementing BPM
- Discover real world solutions and best practices for the challenges you face
- Learn from experts in the field who are able to answer your questions, address your comments, and who are willing to accept your feedback

### Who should attend AIIM's BPM Specialist Class?

The BPM Specialist Class is designed for Business Managers, Business Analysts, IT Managers, Compliance Officers, Archivists, Librarians, Risk Managers, Records Managers, and Information Managers, as well as for solution providers, sales consultants, project managers, and technical staff.



**Audiences**

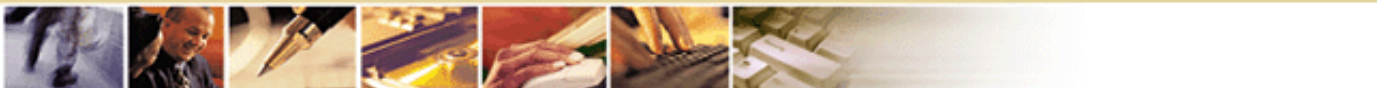
- Business Analysts & Consultants
- IT Management
- Technical staff
- Record Management personnel
- Business Unit (line staff & management)
- Implementation team-IT and business
- Suppliers/Solution Providers/Vendors
- Executives
- Change agents
- Users

**Course Material**

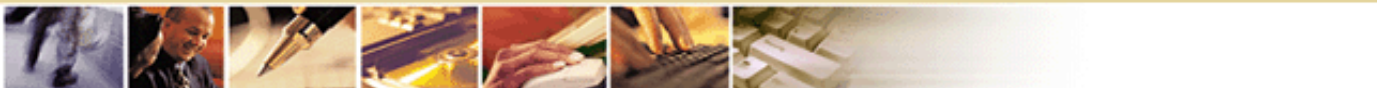
You will receive a BPM Workbook and access to supporting BPM online courses and exam. This will be accompanied by a handout that summarises the key concepts, including references to authoritative publications and web resources.

**Course Agenda**

The BPM Project	
	Learning Objectives
	Project and Process Lifecycles
	Assess
	Plan
	Implement
	Renew
	Wrapping Up
Business Case for BPM	
	Learning Objectives
	Introduction to BPM Business Cases
	Identifying the Problem
	Determine Cost Categories
	Eliminate, Document, Calculate
	Example Cost of Doing Business (CDB)
	Wrapping Up
Stakeholders & The Project Team	
	Learning Objectives
	Identifying Stakeholders
	Building the Right Team
	The Customer as a Stakeholder
	Managing Stakeholders
	Wrapping Up



Gathering Requirements	
	Learning Objectives
	Requirements in Context
	Techniques
	Caveats and Pitfalls
	Wrapping Up
Process Design Best Practices: The Human Dimension	
	Learning Objectives
	Clusters & Bottlenecks
	Parallel Processes
	Natural Order
	Check and Reviews
	Wrapping Up
Process Design Best Practices 2	
	Learning Objectives
	Activity Theory
	Routing
	Workflow Balancing
	Wrapping Up
Implementation	
	Learning Objectives
	What is Needed for Change
	Finding the Right Technology
	Proof of Concepts (POCs) and Pilots
	Implementation
	Wrapping Up
Change Management	
	Learning Objectives
	Types and Approaches
	Technology Change
	Change Readiness
	Best Practices for Implementing Change
	Wrapping Up
Monitoring	
	Learning Objectives
	Monitoring of Processes
	Process Analysis
	On Demand vs. Automated Reporting



	Wrapping Up
Management Methodologies	
	Learning Objectives
	What is a management methodology?
	TQM
	BPR
	Six Sigma
	Wrapping Up

### Summary

#### Training:

- BPM Specialist Class, 2-days, 9am – 5pm
- Includes access to 11 supporting web modules (each approx 1 hour) for 6 months
- Includes 3 opportunities to take and pass the AIIM BPM Specialist web exam
- Includes English language delivery and all training materials

Please contact AIIM if you would like to know the price for organising a private class for your organisation: [training@aiim.eu](mailto:training@aiim.eu)

Please note that this AIIM BPM Certificate Program is designed to give all participants an appreciation of BPM. You should not expect to gain in-depth expertise in all aspect of BPM from this Program. If you need in-depth expertise you should refer to specialist courses, references or expert assistance.

*Agenda is subject to change without notification.*

