



# **TMG's APPROACH TO AGILE BUSINESS PROCESS MANAGEMENT (BPM)**

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**WRITTEN FOR SPONSORS OF, AND PARTICIPANTS IN, A TMG LED BPM  
PROJECT**

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## EXECUTIVE SUMMARY

The *Approach to Agile BPM* provides guidance to participants involved in a TMG-facilitated Agile Business Process Management (BPM) initiative. It not only describes the necessary phases associated with conducting a BPM effort, but also identifies the key work products produced, and, above all, clearly articulates the roles and expectations of each participant in the effort. It includes aspects for risk mitigation, change management and quality control. A prime consideration of this approach is the emphasis on Agile principles, especially as they relate to joint ownership, cross-functional collaboration, and risk reduction through iteration.

The core of the approach is the stream-lined set of linear and iterative phases marking a complete lifecycle of an Agile BPM effort. This comprehensive approach leverages a wide variety of industry best practices, e.g., including elements of the Project Management Book of Knowledge (PMBOK), Michael Porter's Value Chain Analysis, and Agile Product and Software development. Briefly, the phases and associated purpose and sample work products are as follows:

Phase	Purpose	Sample Products
Assess	Define objectives, scope and quantitative targets	Value Stream, Objectives, Scope, Quantitative Targets, Steering Committee
Plan	Develop a course of action and on-board participants	Project Charter, Plan, Risk Mitigation Plan, Team Roster, Select Methodology
Execute	Define Future State and Roadmap	Process Models, Gap Analysis, Business Case, Sequencing Plan
Control	Ensure Results	Progress Reports

Additionally the TMG Agile BPM Approach is specially designed to support multiple industry standard and TMG developed methodologies. This allows TMG to configure the appropriate methodology most applicable to the project objectives and scope being selected for use during the Execution Phase. BPM methods currently being used by TMG as follows:

Agile BPM Method	When to Use	Estimated Time Frame	Characteristic
<b>Just Do It (Kaizen Blitz)</b>	Addressing an isolated pain-point that potentially can be fixed or remediated with some quick fixes	2 to 4 weeks	Small team with focus on "quick hits"
<b>Continuous Process Improvement (DMAIC/BPM)</b>	Longer-term commitment to a significant process stream, that may include investment in IT, or providing the initial high-level process analysis to an enterprise level value stream	3 to 6 months	Significant organizational change impact with corresponding higher level of change management and executive direction
<b>Scalable Agile BPM (Scalable Agile Framework (SAFe))</b>	Implementing a process driven IT investment that involves significant risk	6 to 24 months	Integrated project team with iteration of IT solutions
<b>Accelerated Agile BPM (Extreme Agile)</b>	Implementing a process driven IT investment to an individual process stream or work flow	4 to 16 weeks	Full time commitment of business resources for up to three to four weeks, with intensive modeling sessions

It is critical that both senior business as well as IT management and other key participants in an Agile BPM initiative be versed in the content of the document, and understand and agree to the approach prior to undertaking any BPM engagement.

## Introduction

The Mercator Group (TMG) has spent considerable resources in developing an approach and corresponding methodologies for improving the ability of enterprises to leverage business processes and technology to achieve business goals, operational effectiveness, and customer alignment. Our approach and methodologies have their basis in a wide-variety of industry best practices, from Michael Porter's value chain analysis to Agile product and software development principles and techniques. The objective of the approach and methodologies is to provide a comprehensive road map for modernizing business processes in the shortest amount of time, with the maximum level of impact, at reduced cost and risk.

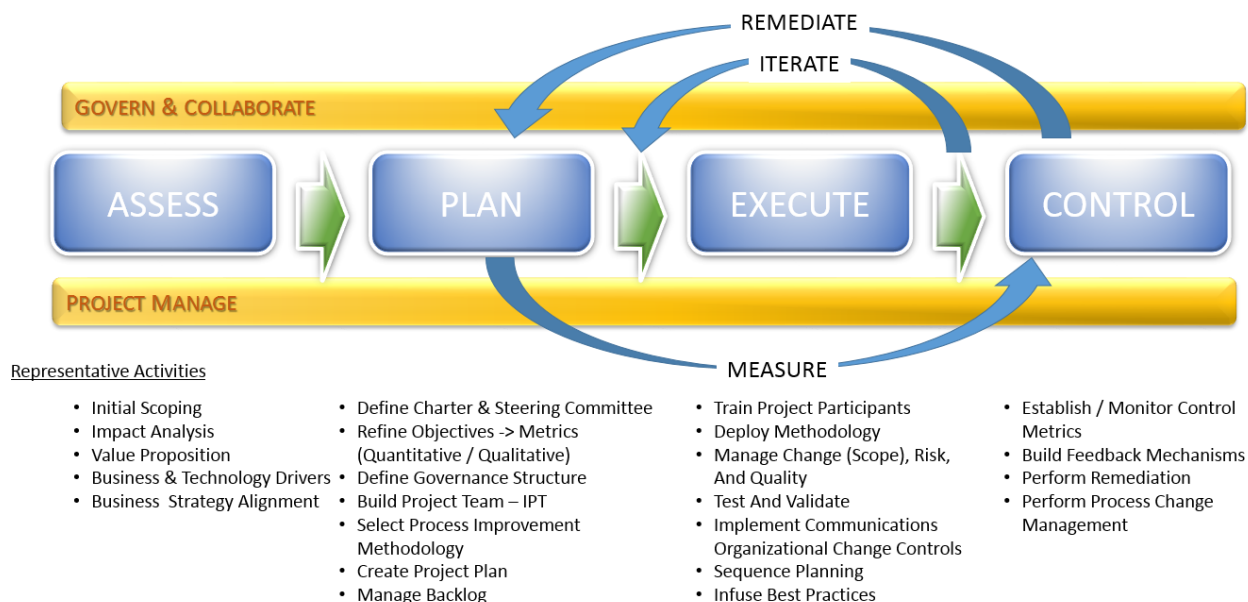
This document presents TMG's Agile BPM Approach, and is written to meet the needs of both sponsors and participants in a TMG led BPM effort. It is designed to answer the following questions:

1. How will following this approach result in successful project implementation
2. What are the steps and gates in the process, and what work products will be produced
3. As someone who will be participating in the process, what are my roles and responsibilities, and what are the roles and responsibilities of other participants
4. How do we control scope and manage risk

The document presents critical guidance for both practitioners and stakeholders participating in a process improvement initiative. TMG believes following the guidance is key to the successful implementation of BPM efforts, whether they be short-lived Kaizen efforts, of major enterprise transformation initiatives.

## TMG's Approach to Agile BPM

TMG's agile BPM approach is based on best practices from multiple related disciplines, to include, Agile Development, project management (PMBOK), Lean Six Sigma, as well as decades of experience in both focused improvement and transformational process improvement efforts. While we will utilize specific "methods" based on the type of BPM project, TMG will follow a consistent approach specifically designed to address complex business processes and organizational change. As illustrated in Figure 1, TMG's approach starts by assuring the most critical business activities are first modeled based on business impact, and then continuously through iterative cycles of process implementations. This approach controls risks while ensuring business value is ultimately achieved. Stakeholder collaboration and sound governance practices are vital to ensuring expectations relating to scope and business impact are well articulated and understood. Additionally, sound project management practices are utilized to properly shepherd process development activities throughout the entire lifecycle.



**FIGURE 1: TMG'S AGILE BPM APPROACH**

This approach is closely aligned to current research and good practices defined as an Agile Business Process Framework and a set of associated Tools that foster collaborative and incremental design and implementation of work processes.

The TMG approach recognizes that organizations are dynamic and that BPM should embody an agile approach. This approach is characterized by short feedback cycles where process definition, development, and deployment are planned and executed through a series of small activities of short duration. After each intervention a new observation is carried out to identify how the organization was changed by the last intervention. Governance and collaboration emphasize continuous analyses through observation of the organization's evolution, making small adjustments between interventions, in moving the organization towards the goals defined by the strategy.

The remainder of this primer is intended to highlight the major components, or phases, of TMG Agile BPM approach throughout a process construction project, including:

- Key Steps and Activities
- Deliverables and Work Products
- Team Structure
- Team Roles and Responsibilities
- Change Control
- Quality Control and Risk Mitigation
- TMG's Agile Business Process Framework
- General Principles and Best Practices

## Key Steps and Activities

As previously mentioned, TMG's agile BPM lifecycle approach is defined as four major phases; Assess, Plan, Execute, and Control. Within each of these phases, there are specific activities performed in order to produce predefined controlled work artifacts and deliverables. Each component emphasizes sound stakeholders governance and participant collaboration. Finally to ensure orderly and transparent execution of the project, sound management practices are leveraged at key project control points or milestones.

The following highlights the primarily activities for each component:

### Assess

Objectives:

- Define opportunity and align process requirements / objectives with enterprise strategies and risks.
- Clearly define the reach and impact of the process.
- Determine potential impact to the organization relative to cost, resources, efficiency, etc.
- Identify all process stakeholders and customers.
- Identify the focal point of analysis for the entire process improvement effort. Identify the start and end points of the effort.
- Assess the organization's readiness to conduct the process improvement action.
- Prioritize relevance to opportunity value and develop a high-level business case based on sufficient capability to close deficiency gaps and ensure successful outcomes.

Key Participants:

- Process Owner
- Client Project Manager
- Lead Facilitator
- Steering Committee

Key Activities:

- Determine scope of opportunity
- Identify Drivers – vital resource, process, or condition for continued success
- Perform Impact Analysis
- Develop Value Proposition
- Align to Business Strategy
- Determine executive sponsor

Work Products:

- Value Stream
- Analytics (Fishbone, etc.)

- Strategy Maps
- Rough Order of Magnitude (ROM)
- Wire Diagrams
- Business Process Maps

### Gates:

- Agreement by key stakeholder on:
  - Executive Sponsorship
  - Scope
  - Objectives
  - Potential business value

### Plan

#### Objective:

- Establish project charter including problem statement, goal and specific measurable objectives, project scope, critical success factors, stakeholders, roles, and project milestones.
- Define feasible and practical solutions.
- Develop a change plan for implementation.
- Establish project governance and supporting team.

#### Key Participants:

- Process Owner
- Client Project Manager
- Lead Facilitator
- Steering Committee
- Business Representatives
- IT Representatives

#### Key Activities:

- Define Charter & Steering Committee
- Refine Objectives -> Metrics
- Define Governance Structure
- Build Project Team – IPT
- Create Project Plan
- Develop initial Process Backlog
- Select Process Improvement Methodology

#### Work Products:

- Project Charter
- Project Plan
- Product Backlog



### Gates:

- Steering Committee established
- Approved charter
- Approved project plan
- Approved refined scope, objectives, and metrics
- Committed resources

### Execute

#### Objective:

- Assess current state in detail and establish baseline.
- Analyze process against identified issues, concerns, and pain points.
- Identify process improvement opportunities, and quantify performance gaps.
- Select the specific improvements to the process.
- Document future state including additional process controls and measures.
- Determine the proposed future state process from the set of potential process improvements.
- Develop a roadmap to move the process to the proposed state.
- Document the proposed future state process in models and related process description documents, as appropriate.
- Document process control, measurement, and management components.
- Iterate process improvement designs.
- Stage and ready for implementation.

#### Key Participants:

- Process Owner
- Client Project Manager
- Lead Facilitator
- Business Representatives
- IT Representatives
- BPI Analyst
- BPI Modeler

#### Key Activities:

- Initial Train Project Participants
- Deploy Methodology
- Manage Change (Scope), Risk, And Quality
- Test And Validate
- Implement Communications Organizational Change Controls
- Sequence Planning
- User Stories

### Work Products:

- Business Process Maps
- Service/Capabilities Descriptions
- Business Case
- Sequencing Plan
- Gap Analysis
- RTM
- Working Models
- Change Requests

### Gate:

- Approved business case
- Approved models
- Validated Processes
- Approved Sequencing Plan
- Trained User

### Control

Objective: This phase takes an approved process improvement effort through the steps needed to deploy the recommendation.

- Implement measures and metrics to provide feedback regarding success of the improvement.
- Make necessary adjustments to plan based on measured results.
- Implement continuous process improvement.

### Key Participants:

- Process Owner
- Client Project Manager
- Business Representatives
- Steering Committee
- Support Staff

### Key Activities:

- Establish / Monitor Control Metrics
- Build Feedback Mechanisms
- Perform Remediation
- Perform Process Change Management

### Work Products:

- Reports/Analytics
- Change Request

Gate:

- Stakeholder acceptance

## Key Deliverables / Work Products

Assess	Plan	Execute	Control
<ul style="list-style-type: none"> <li>• Value Stream</li> <li>• Analytics (Fishbone, etc.)</li> <li>• Strategy Maps</li> <li>• Rough Order of Magnitude (ROM)</li> <li>• Wire Diagrams</li> <li>• Business Process Maps</li> </ul>	<ul style="list-style-type: none"> <li>• Project Charter</li> <li>• Project Plan</li> <li>• Product Backlog</li> <li>• Quantitative &amp; Qualitative Metrics</li> </ul>	<ul style="list-style-type: none"> <li>• Value Stream</li> <li>• Business Process Maps</li> <li>• User Stories</li> <li>• Service/Capabilities Descriptions</li> <li>• Business Case</li> <li>• Sequencing Plan</li> <li>• Gap Analysis</li> <li>• RTM</li> <li>• Working Models</li> <li>• Change Requests</li> </ul>	<ul style="list-style-type: none"> <li>• Reports/Analytics</li> <li>• Change Request</li> </ul>

TABLE 1: POTENTIAL ABPM ARTIFACTS

## Team Structure

As previously mentioned during the Plan phase an integrated Project Team (IPT) is formed. Figure 2 is representative illustration of such an IPT.

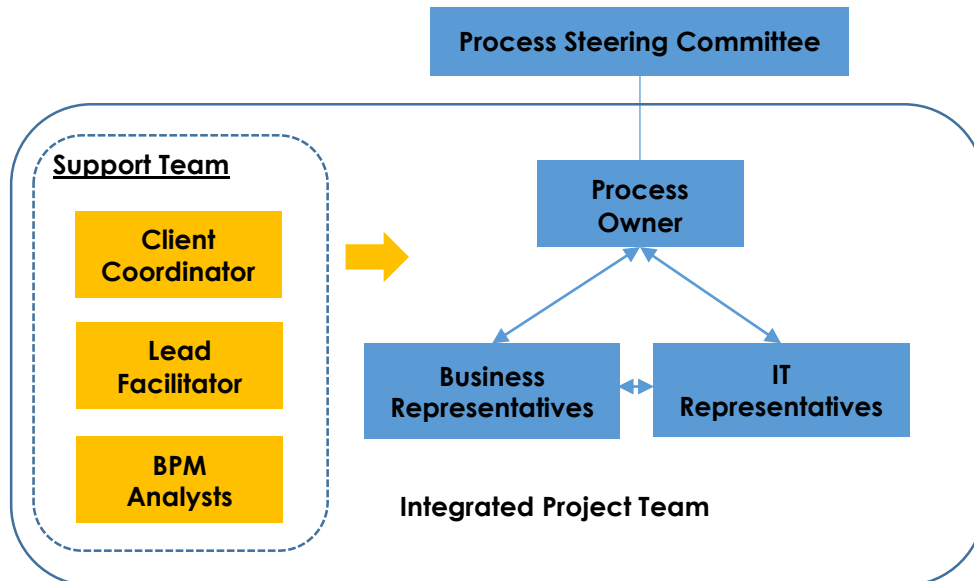


FIGURE 2: AGILE BMP TEAM STRUCTURE

The gold boxes are project support staff providing project coordination, facilitation and BPM expertise, while the blue boxes represent the business and IT stakeholders. The team will always include one lead facilitator, and at least one supporting analyst-modeler. The project organization is weighted heavily to reflect the governance structure of a Government Agency. It could vary slightly for a commercial effort, where governance tends to be more "top-down."

The team is led by the Process Owner, or Process Lead, if ownership is not clearly established. The responsibilities for each of the roles are as follows:

ROLES	RESPONSIBILITIES
<b>PROCESS STEERING COMMITTEE</b>	The Process Steering Committee is responsible for: <ul style="list-style-type: none"> <li>Defining process scope and objectives</li> <li>Ensuring project staffing</li> <li>Clearing organizational road blocks</li> <li>Managing change</li> <li>Communicating executive support to the organization.</li> </ul>
<b>CLIENT COORDINATOR</b>	The Client Project Manager is responsible for: <ul style="list-style-type: none"> <li>Ensuring that the Project Team completes the project.</li> <li>Developing the Project Plan with the team and managing the team's performance of project tasks.</li> <li>Communication, including status reporting, risk assessments, and escalation of scope issues or problems with project execution.</li> <li>Ensure the project is delivered in budget, on schedule, and within scope.</li> </ul>
<b>PROCESS OWNER</b>	The Process Owner is responsible for: <ul style="list-style-type: none"> <li>Obtaining consensus on process improvements within the project team</li> <li>Representing the team's consensus to the process steering committee</li> <li>Managing team participation</li> <li>Secure acceptance and approval of deliverables from the Project Sponsor and Stakeholders.</li> <li>Administering changes to the scope or objectives of the improvement effort</li> </ul>
<b>BUSINESS REPRESENTATIVES</b>	The Business Representatives are responsible for: <ul style="list-style-type: none"> <li>Providing subject matter expertise</li> <li>Representing the interests of their respective organizations</li> <li>Communicating and coordinating project finding and direction with their respective organizations</li> <li>Acting as change agent and champion for the improvement effort</li> </ul>
<b>IT REPRESENTATIVES</b>	The IT Representatives are responsible for: <ul style="list-style-type: none"> <li>Providing IT related expertise to the team</li> <li>Representing both the IT organization and enterprise architecture interests</li> </ul>

<b>LEAD FACILITATOR</b>	<p>The Lead Facilitator is responsible for:</p> <ul style="list-style-type: none"> <li>• Shepherding the project analysis activities</li> <li>• Ensuring proper implementation of the discipline</li> <li>• Coaching the team</li> </ul>
<b>BPI ANALYSTS AND MODELERS</b>	<p>The BPI Analysts and Modelers are responsible for:</p> <ul style="list-style-type: none"> <li>• Providing analysis and modeling support for the team</li> <li>• Performing best practice research</li> <li>• Assembly of project work products</li> </ul>

**TABLE 2: AGILE BPM ROLES AND RESPONSIBILITIES**

## Team Roles and Responsibilities

TMG's approach ensures roles and responsibilities are clearly defined and understood which is shown in the RACI-F model below.

<b>R</b>	<b>Responsible</b>	<i><b>"The Doer"</b></i>	The individual(s) who actually completes the task, the doer. This person is responsible for Action / implementation. Responsibility can be shared. The degree of responsibility is determined by the individual with the "A".
<b>A</b>	<b>Accountable</b>	<i><b>"The Buck Stops Here"</b></i>	The individual who is ultimately responsible. Includes yes or no authority and veto power. Only one "A" can be assigned to a function.
<b>C</b>	<b>Consult</b>	<i><b>"In The Loop"</b></i>	The individual(s) to be consulted prior to a final decision or action. This incorporates two-way communication.
<b>I</b>	<b>Inform</b>	<i><b>"Keep Aware"</b></i>	The individual(s) who needs to be informed after a decision or action is taken. This incorporates one-way communication.
<b>F</b>	<b>Facilitate</b>	<i><b>"The Coach"</b></i>	The individual who is responsible for facilitating, or coaching, individuals or the team for a specific activity or set of activities.

**TABLE 3: THE RACI MODEL**

In applying the above model, the following table illustrates responsibilities relevant to identified work products.

Work Product	Steering Committee	Client Project Manager	TEAM				
			Lead Facilitator	Process Owner	Business Representative	IT Representative	BPI Analyst & Modelers
Value Stream	<b>A</b>	<b>I</b>	<b>F</b>	<b>R</b>	<b>R</b>	<b>C</b>	
Analytics (Fishbone, etc.)		<b>I</b>	<b>F</b>	<b>A</b>	<b>C</b>	<b>C</b>	<b>R</b>
Strategy Maps		<b>I</b>	<b>F</b>	<b>A</b>	<b>R</b>	<b>C</b>	<b>C</b>
Rough Order of Magnitude		<b>I</b>	<b>F</b>	<b>A</b>	<b>R</b>	<b>R</b>	<b>C</b>
Wire Diagrams		<b>I</b>	<b>F</b>	<b>A</b>	<b>R</b>	<b>R</b>	<b>R</b>
Business Process Maps		<b>I</b>	<b>F</b>	<b>A</b>	<b>R</b>	<b>R</b>	<b>R</b>
Project Charter	<b>A</b>	<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>	
Project Plan	<b>A</b>	<b>R</b>	<b>F</b>	<b>R</b>	<b>C</b>	<b>C</b>	
Product Backlog	<b>I</b>	<b>I</b>	<b>F</b>	<b>A</b>	<b>C</b>	<b>C</b>	<b>I</b>
Service/Capabilities Descriptions	<b>I</b>	<b>I</b>	<b>F</b>	<b>A</b>	<b>R</b>	<b>R</b>	<b>C</b>
Business Case	<b>A</b>	<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>	
Sequencing Plan		<b>R</b>	<b>R</b>	<b>A</b>	<b>R</b>	<b>R</b>	
Gap Analysis		<b>I</b>	<b>F</b>	<b>A</b>	<b>R</b>	<b>R</b>	<b>R</b>
RTM		<b>I</b>		<b>A</b>	<b>R</b>	<b>R</b>	<b>C</b>
Working Models		<b>I</b>	<b>F</b>	<b>A</b>			<b>R</b>
Change Requests	<b>A</b>	<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>	<b>R</b>	
Reports / Analytics	<b>I</b>	<b>I</b>	<b>F</b>	<b>A</b>	<b>C</b>	<b>C</b>	<b>R</b>
Dashboards	<b>I</b>	<b>I</b>	<b>F</b>	<b>A</b>	<b>C</b>	<b>C</b>	<b>R</b>

**TABLE 4: WORK PRODUCTS RACI**

## Change Control

TMG follows a formal change management approach to better manage change requests so that approved changes will be controlled, ensuring the project remains on schedule, within budget and provides the agreed deliverables. Therefore, the primary objectives of change management are to:

- Manage each change request from initiation through to closure
- Process change requests based upon direction from the appropriate authority
- Communicate the impact of changes to appropriate personnel
- Allow small changes to be managed with a minimum of overhead

The Change Management Process is the mechanism used to initiate, record, assess, approve and resolve project changes. Project changes are needed when it is deemed necessary to change the scope, time or cost of one or more previously approved project deliverables. Most changes will affect the budget and/or schedule of the project.

The use of the formal change management procedure will be required when any changes are discovered or requested which impact previously reviewed, approved and published project deliverables. A multi-tiered approach will be used to approve change requests:

- The Project Manager will make decisions to analyze and proceed with changes if the changes do not impact scope, budget or schedule or result in an increase in risk for the project.
- Changes which do impact scope, budget or schedule will be forwarded to the Steering Committee for review. The Steering Committee will advise the Project Sponsor.
- Where the functional owner has the resources to absorb the impact of the change, the Project Sponsor will make the final decision, based upon the information provided by the Project Manager and the input of the Steering Committee.
- The Project Sponsor and Project Manager will discuss requests that may result in a significant change in scope, schedule, and budget, i.e. the impact of the change cannot be covered by functional owner resources. This group will advise the Steering Committee.
- The Steering Committee will make the final decision based upon the information provided.

All change requests will be documented and submitted through the agreed to control process.

## Quality Control & Risk Mitigation

TMG has built quality control into both its corporate and program management practices. This is important, as quality control begins with selecting and staffing the right people on a project, and ensuring they are trained and skilled in the required areas. As such, quality control is "baked into" every level of what we do:

### **QC in TMG's Corporate Processes: (reach-back)**

- Singular corporate focus on business process improvement and IT alignment
- Staffing plan and the use of candidate profile based on key skill sets
- Documented approach and methodology based on industry leading practices
- Continuous refresh of practices based on current industry training
- Funding for staff training, and internal training capabilities, as well as mentoring

- Industry networking and participation.

**QC at the Mercator Project Level:**

- Project staffing model
- Multiple levels of review, including peer-to-peer
- Documented templates and QC standards for key artifacts
- Flexible tool set of methodologies to fit project requirements
- Investment in quality modeling tools to support project work products
- Iteration and continuous feedback mechanisms built into methodologies.

Closely associated with the TMG quality control mechanism is our risk mitigation framework, which is outlined in the table below.

RISK	MITIGATION STRATEGY
<b>Program Execution</b>	<ul style="list-style-type: none"> <li>• Using Appropriate and Best Practice Methodologies (TMG Agile BPM)</li> <li>• Appropriate Skills &amp; Competencies</li> <li>• Program Management Gates; In-process Reviews</li> <li>• Peer and Program Review of Significant Work Products</li> <li>• Synching Budget (CPIC) and Architecture to Strategy through Governance</li> </ul>
<b>Missed Improvement Opportunities/ Unrealized Requirements</b>	<ul style="list-style-type: none"> <li>• Utilizing Process/ Product Owner</li> <li>• Clearly Defined Stretched Performance Objectives</li> <li>• Clearly Defined Metrics</li> <li>• Team Formulation and Execution</li> <li>• Applying integrated and Iterative Process Design and Implementation (Agile BPM)</li> </ul>
<b>Cultural Impact</b>	<ul style="list-style-type: none"> <li>• Change Agents and Training</li> <li>• Integrated Project Teams</li> <li>• Governance (Relationship Management)</li> </ul>
<b>Mistaken Reliance on Initial Estimates throughout Program Lifecycle/ Increased Scope</b>	<ul style="list-style-type: none"> <li>• Integration of Agile Development Driven by BPM-Generated Requirements</li> <li>• Agile-Aware Change Control Governance Process</li> <li>• Shared Stakeholder Ownership</li> </ul>
<b>System/Technology-Driven Change</b>	<ul style="list-style-type: none"> <li>• Strong Product Ownership with BPM-Driven "Solutioning"</li> </ul>

TABLE 5: TMG RISK MITIGATION FRAMEWORK

## TMG's Agile Business Process Framework

A key capability of the TMG approach is the full adoption of an Agile framework, which accommodates multiple industry accepted methodologies from Kaizen Blitz, to continuous process improvement and Lean Six Sigma, as well as TMG's accelerated



process implementation methods. TMG's use of Agile goes beyond the adoption of Agile principles, such as shared ownership and iteration. This is especially the case in our scaled and accelerated Agile methods, which completely integrate process design with process implementation, including the software development lifecycle. A complete discussion of TMG Agile methodology is included in our work books on the subject, and is beyond the scope of this document.

The chart below outlines a representative set of BPM methods that TMG's approach accommodates, including TMG's version of Scalable Agile Framework (SAFe) and Accelerated methods, that collapse process design and process implementation into short intensive cycles. The TMG support team would work with the project sponsors to select the best methodology for addressing the specific needs and scope of the process improvement being implemented.

Agile BPM Method	When to Use	Estimated Time Frame	Characteristic
<b>Just Do It (Kaizen Blitz)</b>	Addressing an isolated pain-point that potentially can be fixed or remediated with some quick fixes	2 to 4 weeks	Small team with focus on "quick hits"
<b>Continuous Process Improvement (DMAIC/BPM)</b>	Longer-term commitment to a significant process stream, that may include investment in IT, or providing the initial high-level process analysis to an enterprise level value stream	3 to 6 months	Significant organizational change impact with corresponding higher level of change management and executive direction
<b>Scalable Agile BPM (Scalable Agile Framework (SAFe))</b>	Implementing a process driven IT investment that involves significant risk	6 to 24 months	Integrated project team with iteration of IT solutions
<b>Accelerated Agile BPM (Extreme Agile)</b>	Implementing a process driven IT investment to an individual process stream or work flow	4 to 16 weeks	Full time commitment of business resources for up to three to four weeks, with intensive modeling sessions

TABLE 6: TMG AGILE BPM METHODS

## General Principles and Best Practices

Key principals and developmental guidelines for TMG's agile BPM approach include:

### Accelerating Implementation and controlling risk through Iteration

- As process improvement opportunities are identified and validated, they can be moved into a process improvement backlog for potential early implementation.
- Current state documentation will only be completed to the extent that it provides value to the analysis.

- Piloting of improvements is encouraged to validate finding and provide feedback.
- Integrated project teams, including both business and IT stakeholder representatives, is essential to gaining consensus and developing realistic implementation plans.

### Empower People

- Processes should promote collaboration, creativity and intelligence instead of restricting them.
- The system should allow people to perform unplanned activities and integrate them with planned activities.

### Business process design integrated with technological usage

- To avoid a situation of paralysis by analysis due to different perspectives on processes, a modeling approach based on the operation of the business should be enforced. This way, the different perspectives on process modeling will be focused on bottom-up leveraging of the actual operation of the business.
- Integrate the execution and modeling of the process, such that the process executor is also one of its modelers, thus avoiding the shortcomings of top-down modeling of processes.

### Design at the instance level

- It should be possible to describe processes on a case-by-case approach instead of trying to model all the possible situations in the process specification. This will allow a reduction of the complexity of business process models and it will provide two views of the process: the type view, containing the expected behavior common to all instances, and the instance view, containing exceptions to the expected behavior present on the type view of the process.
- It should be possible to promote unplanned exceptions (described at the instance level) to become part of the planned behavior of the business process (described at the type level). This approach promotes the bottom-up definition of processes.

### Follow project management good practices and guidelines

- All CPI efforts will have objective targets established at the beginning of the project
- All efforts will have a product manager that is responsible for coordinating with process owners and change management
- Changes to project objectives will be communicated to all stakeholders, and incorporated in project material, such as project charters
- Projects will be conducted as integrated project teams, and each team should be staffed with no less than two business analysts
- The project lead will review the project plan and objectives with all key stakeholders prior to proceeding, and obtain sign-off by the product owner

- All process designs will have a process abstraction level (value stream) that can clearly articulate the process to executive level stakeholders
- Detailed process diagrams will only be provided in a format that is legible and easily read
- Executive presentations and report outs will not exceed seven slides, and should focus on business value, cost, risk, and timelines