When using an approach such as BPMN to model existing processes, one question that is often asked is "where do we start", or put differently "how do we know how our processes currently work?".

Understanding the current state can help us to effectively monitor and measure our processes (in terms of efficiency, effectiveness and to spot variances), and can help us to spot opportunities for improvement.

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WHAT IS 'AS IS' IN **BPMN?**

In many organizations, business process management can be somewhat fragmented and 'ad hoc'. This might mean that different teams and departments have maintained different types of process artefact, to varying levels of formality and accuracy. Some teams might have beautiful, up-to-date, accurate process models - others might have written procedural guides that haven't been updated for years. Whether artefacts are formal or informal, up-to-date or out-of-date, they can still provide a useful starting point. These types of artefacts will often help us discover fragments of wider, end-to-end processes, and will help us determine what further questions to ask. Even the most scant, out-of-date process document will likely help us to uncover:

- *The process start point (triggers)*
- *Any key decisions, or areas where business rules are applied*
- *Any key handovers*
- *The outcome or output*

It is important, of course, to remember that a process artefact will have been written from a particular perspective or with a purpose in mind. If it has been written informally, it may not cover regular exception flows, and the decision logic might need revisiting. Yet, this gives us a place to start.

However, a usual next step is to elicit further information about the process from those that are directly involved. One-on-one interviews

can be a productive way of understanding the finite detail (by speaking to those involved in the process execution) as well as the broader, higher-level detail (by speaking to those who have broader oversight). Speaking to people separately will often help uncover inconsistencies, where different stakeholders have different views about what is happening (or what ought to happen). This often provides a valuable avenue for further exploration.

Having spoken to those involved, another technique that has particular merit is observation. By actually going and seeing how a process works we will uncover the elements that people have forgotten to tell us about. Perhaps there are workarounds, or 'home grown' IT solutions (spreadsheets, databases) that are not shown in the 'official' process diagram or procedure manual. Capturing information about workarounds, problems and inefficiencies means that we can 'face up' to them and look to improve them.

Observation, however, is easier said than done. It's important to observe for long enough to see a range of different cases, and to see the widest variety of issues or exceptions. This will typically involve observing different process operators at different times. Where time allows, it is also worth observing operators with different perceived levels of 'productivity'. It might be the case, for example, that those with perceived lower productivity are actually those adhering to the process - whereas those perceived as more 'productive' have developed their own unofficial workarounds.

This can lead to some useful discussions - for example, do the workarounds represent a smart innovation that can be adopted more broadly as part of the formal process,

or are they introducing risk (so we should avoid them, but accept lower productivity)? Of course, there may be other improvement options too. Having used process investigation and elicitation techniques such as document analysis, interviews and observation, it can then be useful to bring people together in a workshop to discuss the findings. Workshops provide us with an opportunity to discuss inconsistencies, differences in perspective and to drive towards a consensus. We can discuss improvement opportunities and make decisions on how the process should work in future. These will all be crucial inputs into an updated and formalized BPMN model. With stakeholders fully engaged, it is much easier for them to feel ownership of the model that is ultimately produced, meaning that we have a much better chance of ensuring it is kept up to date.

In Summary

Formal modeling approaches such as BPMN rely on the modeler having an accurate understanding of the business situation so that an appropriate process can be modeled. Using a variety of elicitation techniques, such as document analysis, interviews, workshops and others can help us achieve this.

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