

## Online BPM Practitioner Training Class

*- Learn technologies and concepts for improving business processes*

### Introduction

The Business Process Management (BPM) Training Program is designed from global best practices among our 70,000 members. The program covers concepts and technologies for:

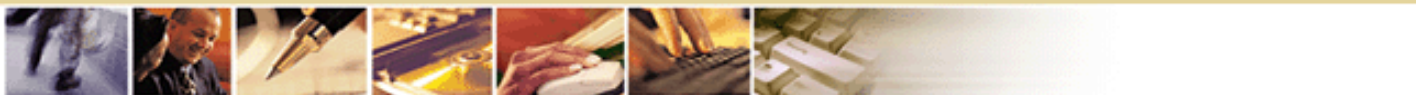
- Streamlining and re-engineering
- Requirements gathering and analysis
- Application integration
- Process design and modeling
- Monitoring and process analysis
- Managing change

AIIM is the global community of information professionals. We provide the education, research and certification that information professionals need to manage and share information assets in an era of mobile, social, cloud and big data. Founded in 1943, AIIM builds on a strong heritage of research and member service, and as an advocate and supporter of information professionals. AIIM represents the entire information management community, with programs and content for practitioners, technology suppliers, integrators and consultants.

### Course Development

The course objectives and content are defined and reviewed by AIIM Education Advisory Groups in the US and Europe, representing AIIM's more than 70,000 members. These Education Advisory Groups have subject matter experts from the following companies:

- |                                   |   |
|-----------------------------------|---|
| • Doculabs                        | • GlaxoSmithKline                             |
| • CMS Watch                       | • TOWER Software                              |
| • Kofax                           | • Ricoh                                       |
| • Accenture                       | • Gartner                                     |
| • Docubase Systems                | • Canon                                       |
| • US Department of Treasury       | • The National Archives of the United Kingdom |
| • US Courts                       | • Zylab                                       |
| • Westminster College             | • Royal Mail                                  |
| • Fujitsu                         | • BearingPoint                                |
| • Harris Corporation              | • Oracle                                      |
| • IBM                             | • Serco                                       |
| • EMC                             | • Microsoft                                   |
| • JPMorgan Chase                  | • Virgin Media                                |
| • Marion County Health Department | • The Process Factory                         |
| • Gimmel Group                    |   |



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

### **Course Description**

The BPM Practitioner covers technologies and practices for improving business processes. In some regards, the BPM courses can be considered as the key consulting and analysis tools to best utilize ECM technology. To be sure, we cover the essential technical implications of and approaches to Business Process Management. For example, what is a Workflow Engine, when should it be used, how does it work and how can I construct my business analysis activities to best utilize this technology? As With much of the focus is on providing trainees with techniques and tools, we cover in detail the major modeling tools, how they work and how best to get value from them.

While the goal of this course is to equip trainees with the basics of business process improvement techniques, we also briefly cover related areas including methodologies that make great use of such techniques. These include Six Sigma, Lean and TQM, along with some important historical perspective on the roots of BPM – with a particular focus on BPR (Business Process Re-Engineering), lessons learned from that period – and direction on where the industry and requirements are currently headed. This will be particularly important as BPM provides the opportunity to make a radical change to a business, focused on outcomes not just on processes (unlike earlier methods that looked to the collective impact of multiple small changes).

Although the course content will focus on BPM, the basic techniques and education will also be applicable to those wanting to simply make small incremental changes. In short, this is a highly practical training option – of appeal to broad range of trainees.

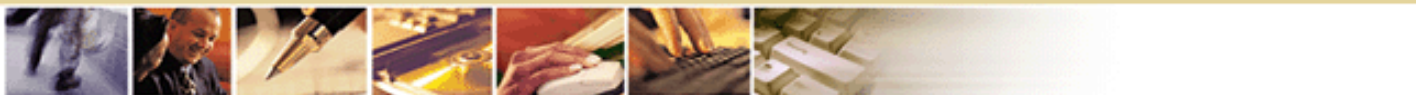
Learn:

- The practice of BPM
- Role of ECM in BPM
- Business analysis
- Process improvements
- Flowcharting
- Process modeling
- Business process improvement
- Business process reengineering
- SOA
- Six Sigma and continuous improvement
- BPM technologies
- Standards and protocols
- Collaboration

### **Course Objectives:**

At the end of this course, you should understand:

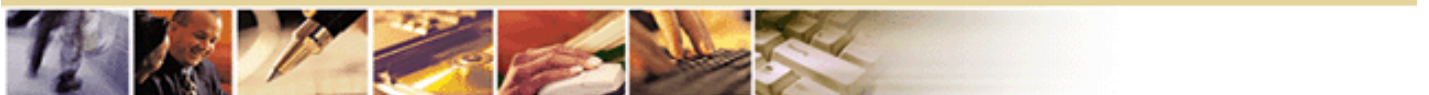
- The Practice of BPM
  - Understand what Business Analysis skills consist of
  - Define what process modeling is and the value it brings to a BPM project
  - Distinguish between various methodologies commonly used in BPM projects
- Role of ECM in BPM
  - What ECM is
  - Why you would use ECM in your organization
  - How ECM and BPM can work effectively together



- Business Analysis
  - Articulate process analysis in the broader context of business analysis
  - The pivotal role of business analysis
  - The key activities that this work focuses on
  - A number of key methods and approaches to analysis
  - Place project-level analysis in context with strategic, enterprise activities
- Basics of Process Improvement
  - Articulate typical reasons for business process change
  - Contrast “Away from” and “Go to”
  - Distinguish among different process scenarios
    - i. Ad-hoc vs. Production
    - ii. Routing vs. Workflow vs. Integrated Business Processes
  - Understand when to employ streamlining versus re-engineering
- Flowcharting 101
  - The fundamentals of flowcharting
  - The role and value of flowcharting
  - How to recognize and be able to use standard charting symbols and functions
  - How to apply flowcharting best practices
- Process Modeling
  - Recognize the difference between modeling and flowcharting and understand the added value of modeling
  - Understand the potential drawbacks of modeling
  - Distinguish among different tools for modeling activities
  - Distinguish between modeling and execution and the role of standards
- BPM Approaches
  - BPI (Business Process Improvement)
  - Continuous Improvement
  - Service Oriented Architecture (SOA)
  - BPR (Business Process Reengineering)
- BPM Technologies
  - Understand how the BPM software marketplace is structured
  - Differentiate among the different available approaches to BPM
  - Connect BPM scenarios to specific types of BPM technologies
  - Compare and contrast Workflow and BPM technologies
  - Identify the core functional services in a standard BPM architecture
  - Articulate the purpose of each service, and describe how they work
- Enterprise Application Integration (EAI)
  - Recognize the importance of integrating applications into the business process
  - Understand the key approaches to application integration
  - EAI versus ESB (Enterprise Service Bus)
  - Make use of the relationship between BPM and Application Integration technologies
- Collaboration
  - Identify the breadth of document-centric collaboration approaches
  - Recognize the limitations and advantages of collaborative technologies and activities
  - Understand the fundamental differences between simple collaboration and full BPM

### Course Designation

You will be awarded the AIIM BPM Practitioner (BPM<sup>P</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 Practitioner. 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 Practitioner (BPM<sup>P</sup>):**

- Position yourself to be tomorrow's leader by enhancing your business and professional skills
- Learn concepts and technologies for 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 Practitioner Class?**

The BPM Practitioner 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**

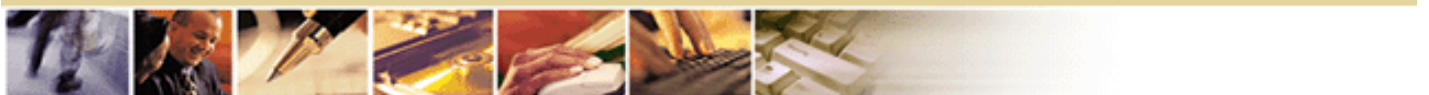
- Business Analysts
- IT Management
- Technical staff
- Record Management personnel
- Business Unit (line staff & management)
- Implementation team-IT and business
- Suppliers/Solution Providers/Vendors
- Executives
- Change agents
- Users

**Course Material**

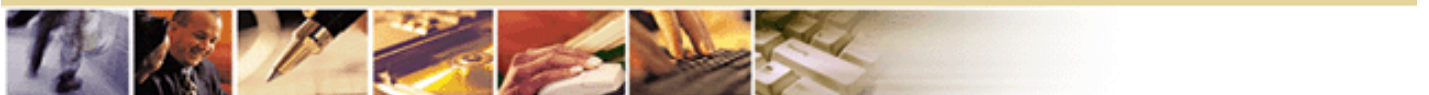
You will receive a BPM Workbook and access to supporting BPM online courses and exam. You will receive a succinct overview of what BPM covers; the strategy drivers for its introduction that should be considered; the benefits that can be realized; and the impact its introduction can be expected to have on an organization at all levels. You will also get a handout that summarizes the key concepts, including references to authoritative publications and web resources.

**Course Agenda**

The Practice of BPM	
	Learning Objectives
	Business Analysis
	Process Modeling
	BPM Technologies
	BPM Methodologies
	Wrapping Up
Role of ECM in BPM	
	Learning Objectives
	What is ECM?
	Why ECM?



	Commonality between BPM & ECM
	Examples
	Wrapping Up
Business Analysis	
	Learning Objectives
	What is Business Analysis (BA)?
	The Process of Analysis
	BPM and the BA
	Practical BA Applications
	Wrapping Up
Basics of Process Improvement	
	Learning Objectives
	Making the case for process change
	Process Characteristics
	Streamlining
	Re-Engineering
	Wrapping Up
Flowcharting 101	
	Learning Objectives
	Flowcharting Fundamentals
	Symbols and Functions
	Principles and Best Practices
	Wrapping Up
Process Modeling	
	Learning Objectives
	Charting vs. Modeling
	Process Modeling Tools
	Process Modeling Options
	Wrapping Up
BPM Approaches	
	Learning Objectives
	Business Process Improvement
	Business Process Reengineering
	SOA
	Six Sigma/Continuous Improvement
	Wrapping Up
BPM Technologies Overview	
	Learning Objectives
	Workflow Defined
	Forms-Centric vs. Process Engine-Centric
	Workflow Options



	Production Workflow
	Wrapping Up
BPM Technology Dissected	
	Learning Objectives
	Key elements of BPM technology
	BPM Dissected
	Standards & Protocols
	Wrapping Up
Enterprise Application Integration (EAI)	
	Learning Objectives
	Definitions of EAI
	EAI in Detail
	EAI Technology
	EAI and Business Process
	Wrapping Up
Collaboration	
	Learning Objectives
	What is Collaboration?
	The Reality of Collaboration
	Relationship with ECM and BPM
	Workflow Options
	Wrapping Up

### Summary

Students have unlimited 24-7 access to the 11 online modules and handouts for 6 months. Students will have one small exam with 15 questions at the end of each module. You need 70% correct answers to pass each exam, and you will then receive the designation.

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

Please note that this AIIM BPM Training 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 are subject to changes without notification.*

