



III Congreso Iberoamericano de Soluciones Sistémicas para la Transformación
de las Organizaciones:
Lecciones Sistémicas Derivadas de las Crisis
Online Conference

01-03 December 2021
Madrid, Spain



Member of:

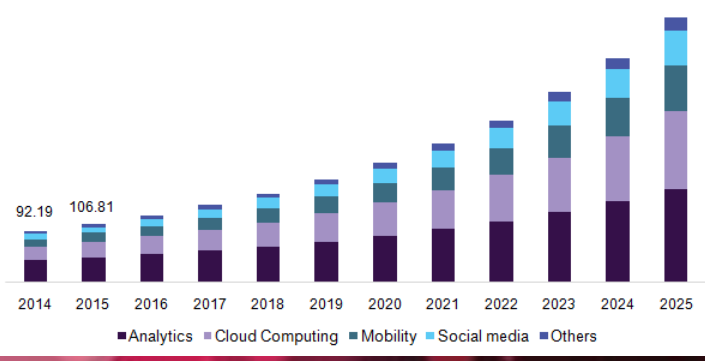
International Federation for Systems Research (IFSR), Austria
Asociación Latinoamericana de Sistémica (ALAS)

Soft – BPM: A Systemic Methodology to Enhance the Life-Cycle of BPM

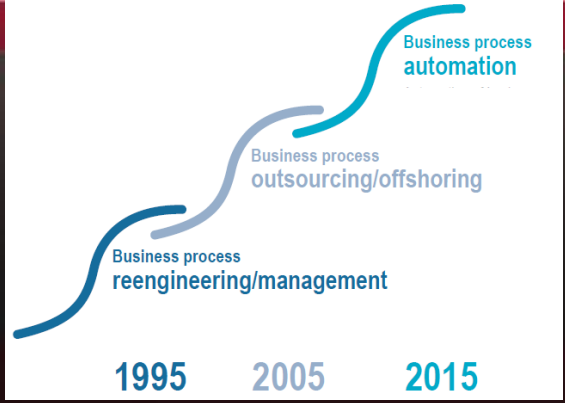
Ricardo Rodriguez-Ulloa

Professional Principal Researcher at the Instituto Andino de Sistemas – IAS, Peru
Honorary President of the Latin American Systemic Association – ALAS

Lima, Peru

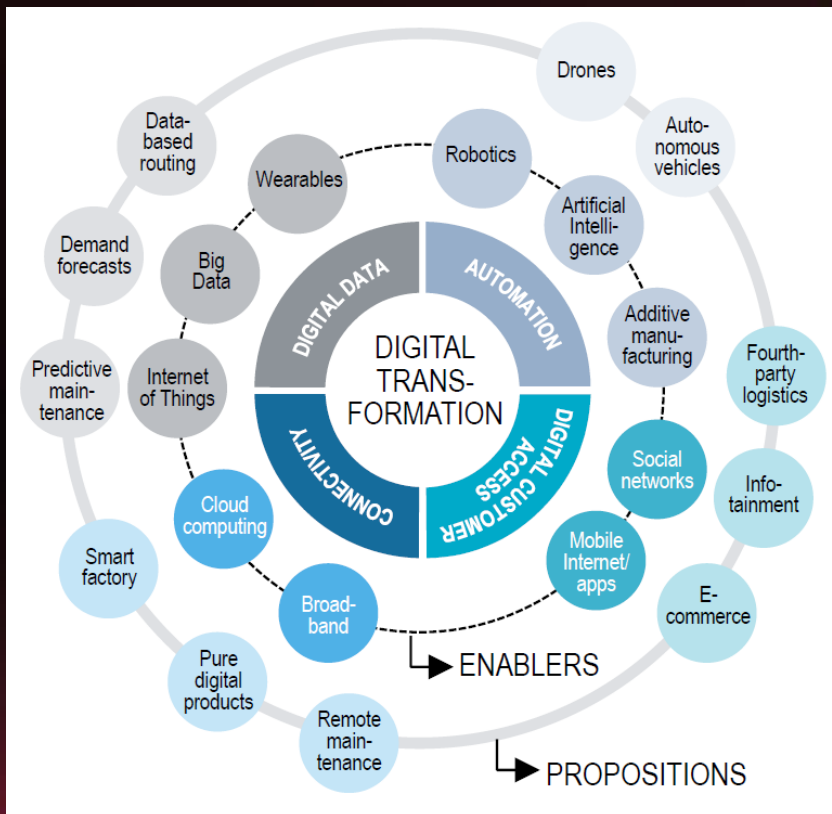
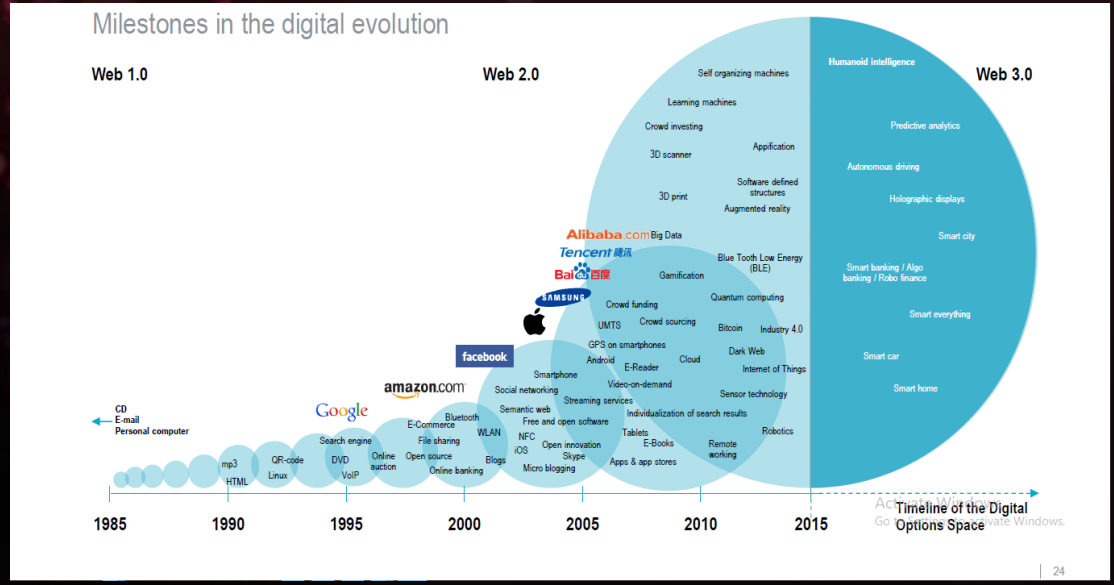


Evolution of BPM Paradigm

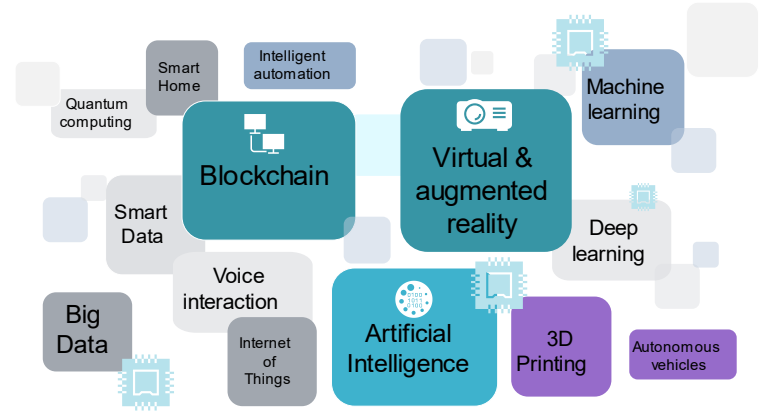


Digital Transformation is changing everything, follow an exponential growth path

Digital Transformation Market: \$ 798.44 billion in 2025



Levers of Digital Transformation

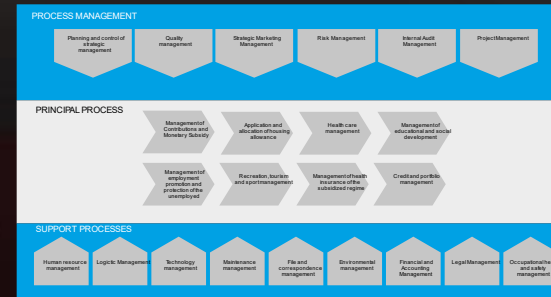


New technologies emerges impacting our lifes and human organizations

The problem

Central Question:

Is the way to obtain the Landscape Model correct?

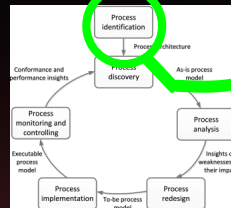


What was found?

- Processes taken from the organization's organigram
- Suggested by an external consultant
- Use preconceived templates
- Macro-processes not aligned to Mission and Vision
- In the BPM's Process Identification Stage:

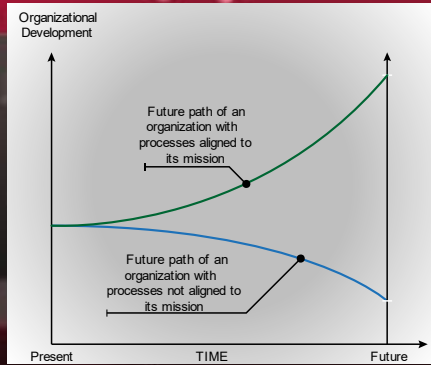
- Clients, Actors and Owners ignored
- Weltanschauungen of stakeholders ignored
- Power Structure among stakeholders not considered
- Macro-processes not systemically interrelated
- Macro-processes use nouns instead of qualified verbs

Traditional BPM Life Cycle

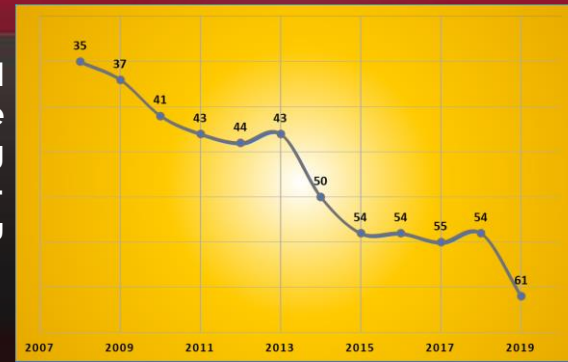


Cases

Time vs Organizational Development



World Competitiveness Ranking IMD Index - Peru



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ORGANIZATION

▶ **SUPERVISORY AGENCY FOR INVESTMENT IN ENERGY AND MINING (OSINERGMIN)**

▶ **MISSION (ROOT DEFINITION):** Regulate, supervise and supervise the energy and mining sectors with autonomy, technical capacity, clear and predictable rules, so that activities in these sectors are carried out safely and a reliable and sustainable energy supply is available.

▶ **NATIONAL SUPERINTENDENCE OF TAX ADMINISTRATION (SUNAT)**

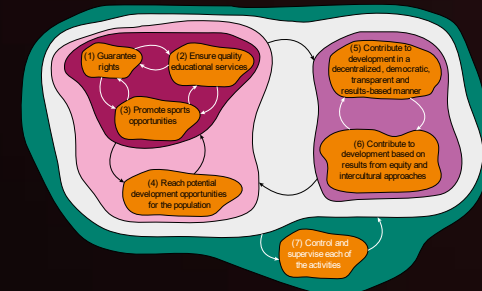
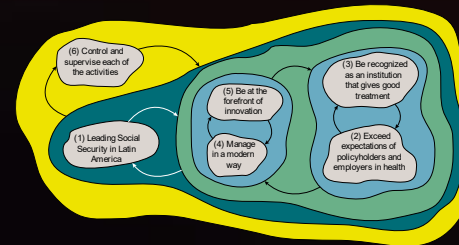
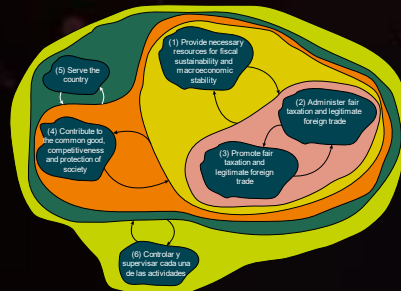
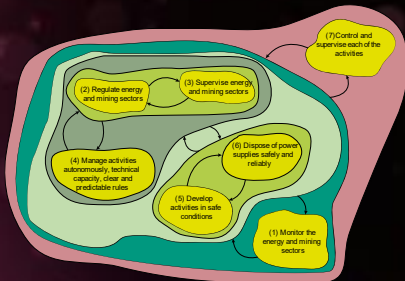
▶ **MISSION (ROOT DEFINITION):** Serve the country by providing the necessary resources for fiscal sustainability and macroeconomic stability, contributing to the common good, competitiveness and protection of society, through the administration and promotion of fair taxation and legitimate foreign trade.

▶ **SOCIAL HEALTH INSURANCE OF PERU (ESSALUD)**

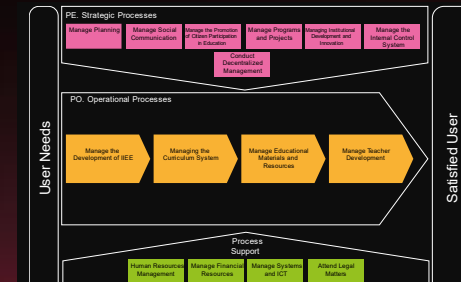
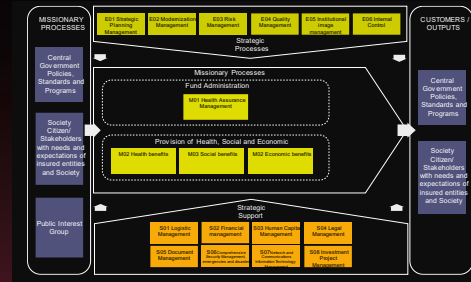
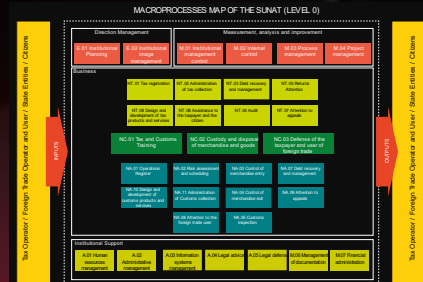
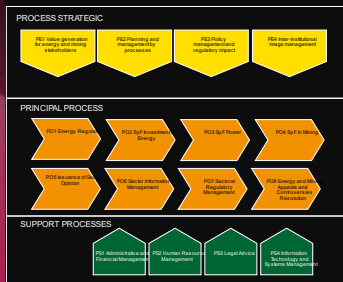
▶ **MISSION (ROOT DEFINITION):** To be a leader in Social Health Security in Latin America, exceeding the expectations of the insured and employers in the protection of their health and being recognized for its good treatment, with modern management and at the forefront of innovation.

▶ **MINISTRY OF EDUCATION (MINEDU)**

▶ **MISSION (ROOT DEFINITION):** Guarantee rights, ensure quality educational services and promote sports opportunities to the population so that everyone can reach their potential and contribute to development in a decentralized, democratic, transparent manner and based on results from equity and intercultural approaches.



CONCEPTUAL MODEL



SSM

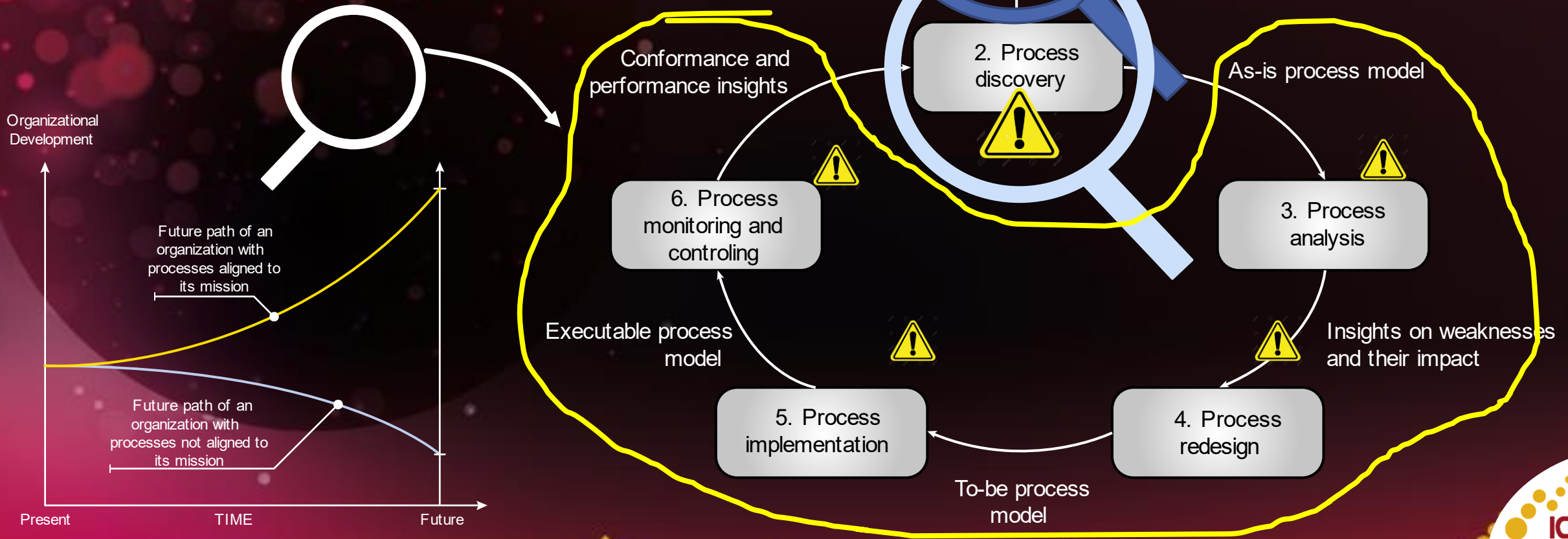
BPM

LANDSCAPE MODEL

Research objective

- ▶ Improve all stages of the BPM Life Cycle, specially the 1st stage.

It is crucial for the whole BPM project

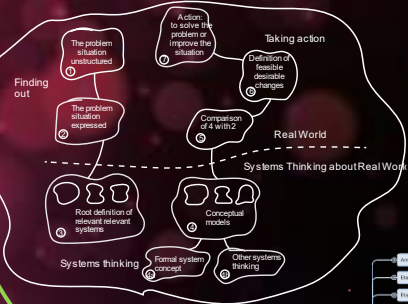


Soft-BPM

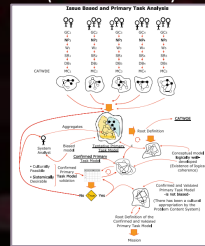
SSM

- ✓ Phenomenology / Hermeneutics / Epistemological Description of MR
- ✓ Processes "supposedly" occur in the MR
- ✓ Consider Clients, Actors and Owners of the problem
- ✓ Oriented to implement viable transformations in the MR (CF and SD)

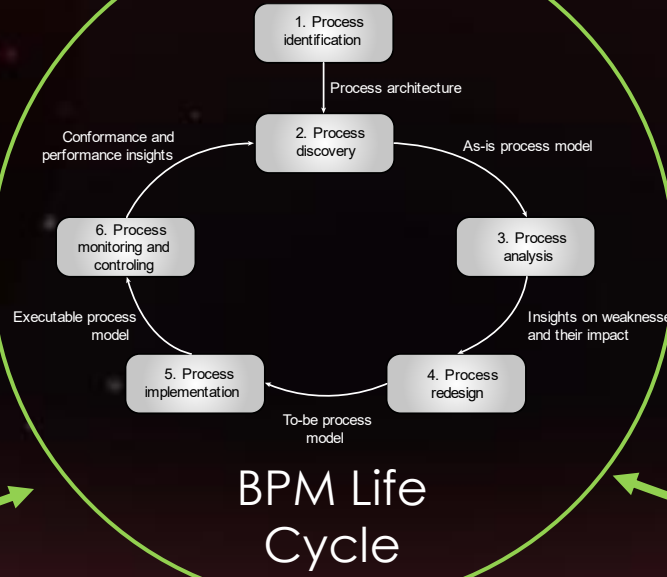
SSM
(Peter B. Checkland, University of Lancaster, UK)



Wilson variant
(Wilson 2001)



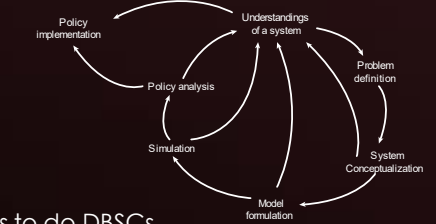
SMKCM
(Rodríguez Ulloa, 2018)



SD

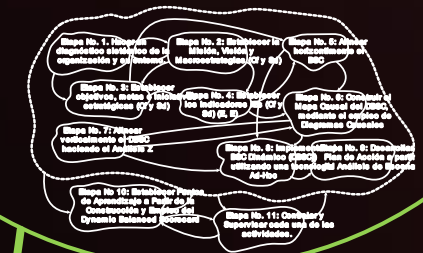
- ✓ Simulate behaviors of key variables over time

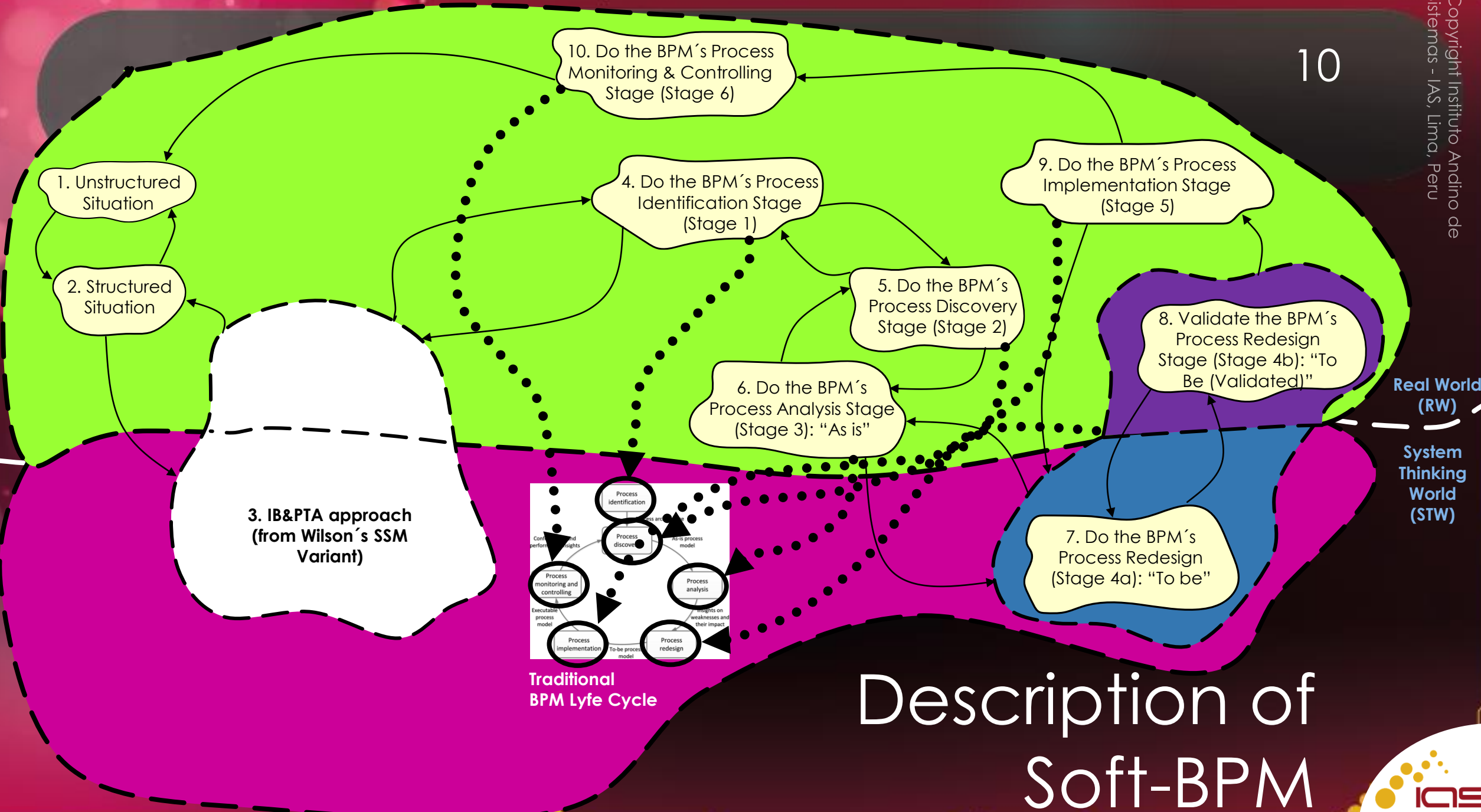
SD
(Jay W. Forrester, MIT, USA)



- ✓ It allows to do DBSCs

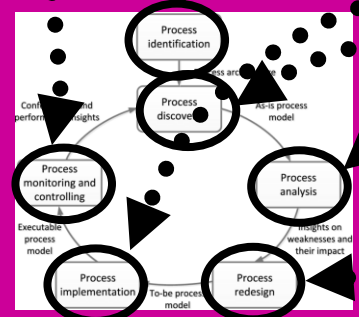
SMBSC-DM
(Systemic Balanced ScoreCard Methodology)
(R. Rodríguez Ulloa, 2010)





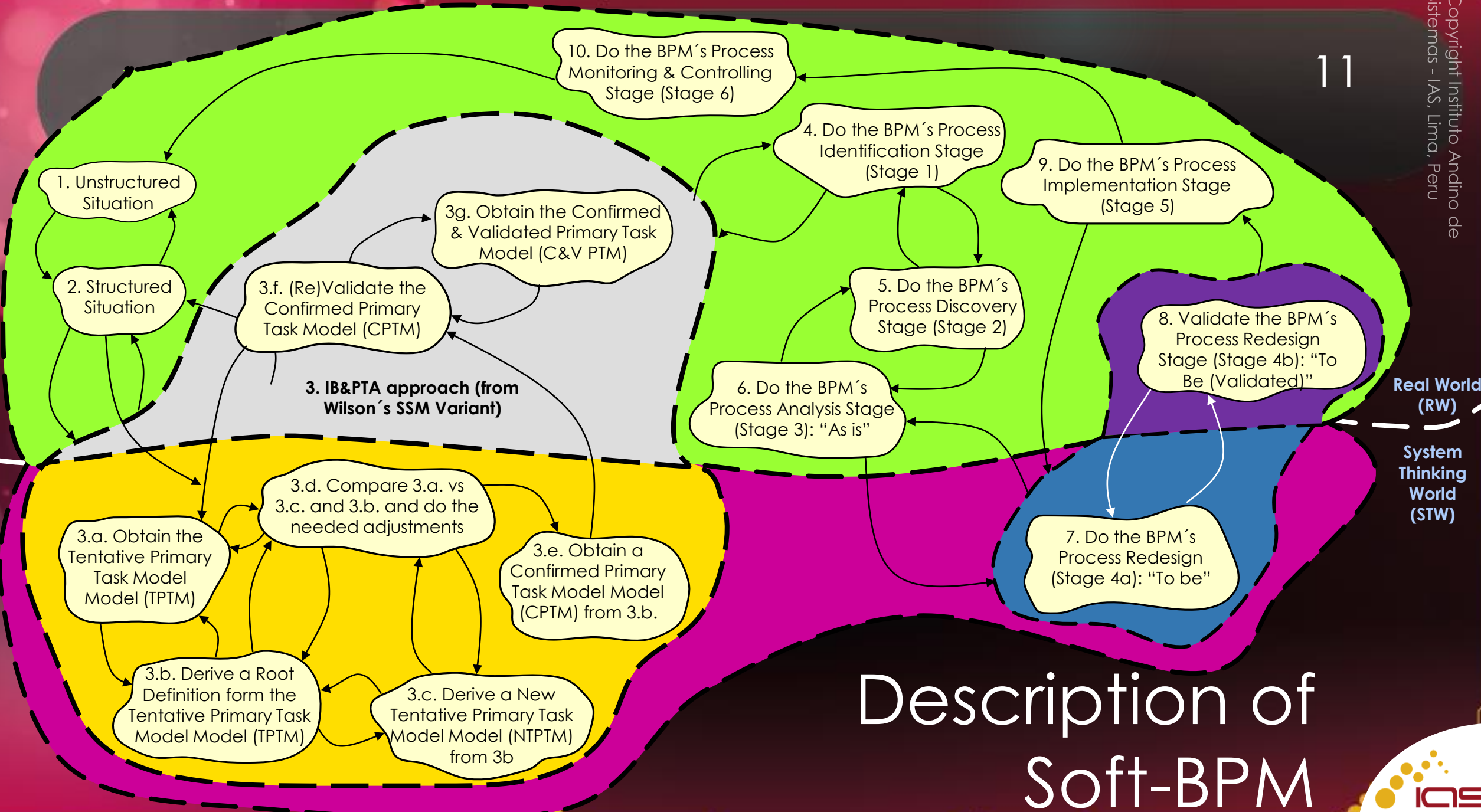
Real World (RW)
System Thinking World (STW)

3. IB&PTA approach
(from Wilson's SSM Variant)



Traditional BPM Life Cycle

Description of Soft-BPM



Description of Soft-BPM

1. Unstructured Situation

It is the first impression of the problem situation (PS) under study

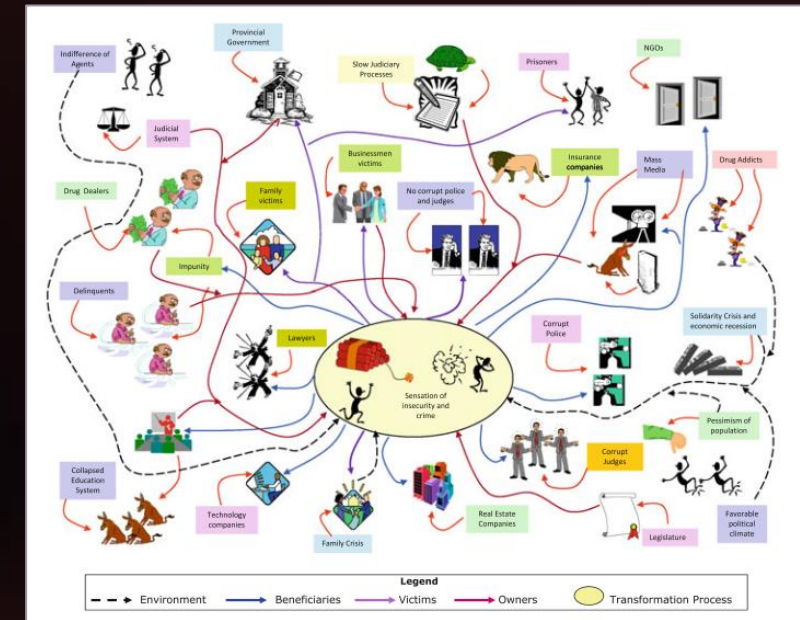
1. Unstructured Situation

- Situation not understood
- Interrelationships (formal / informal) not known
- Unclear System of Reference
- Unclear idea about the supra, infra, hetero and iso systems
- HAs not clearly defined
- Ws of stakeholders ignored
- Timeline of stakeholders and elements not known
- Stakeholders can be: Owners, actors, clients
- Power relationships among stakeholders not known.

2. Structured Situation (Rich Picture)

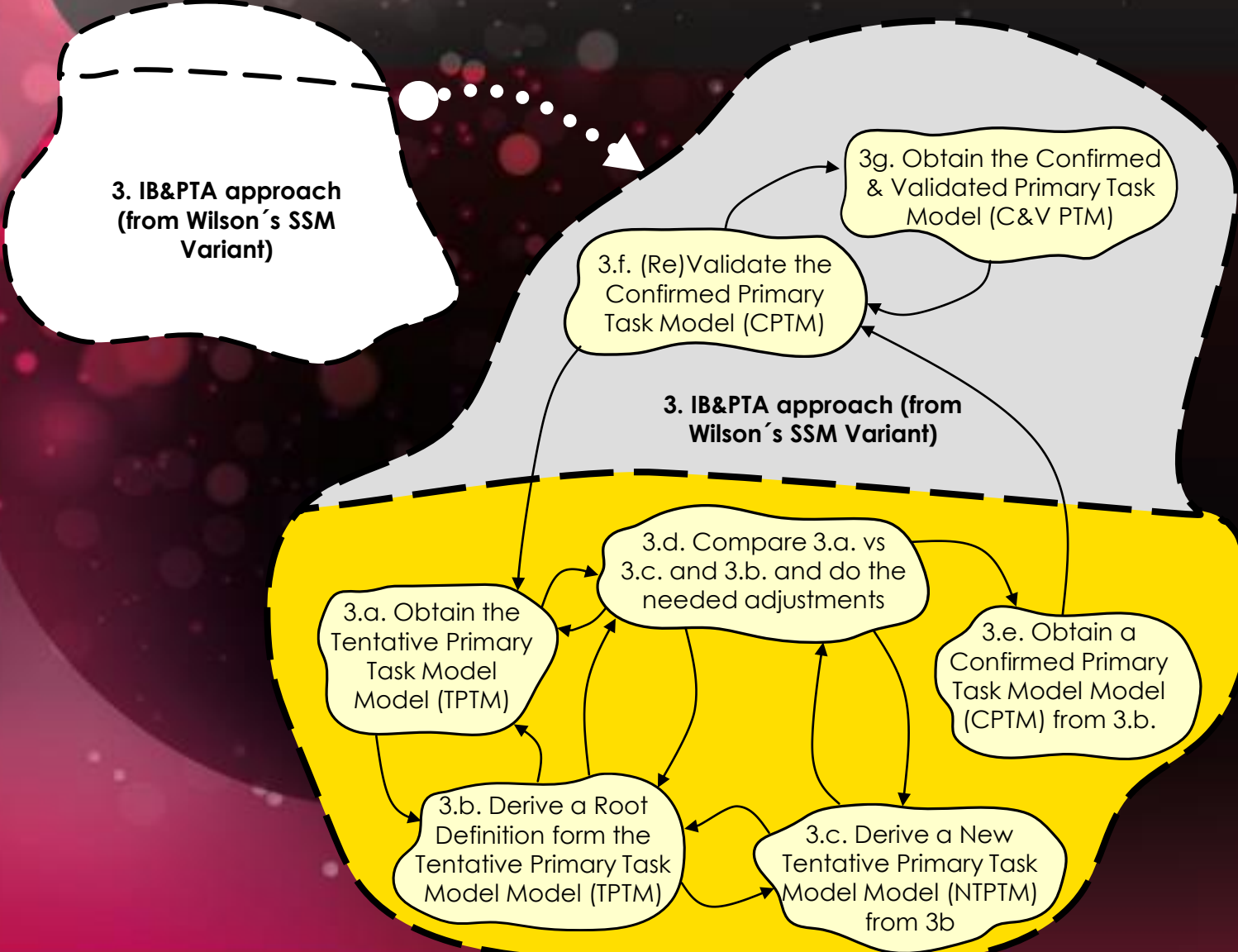
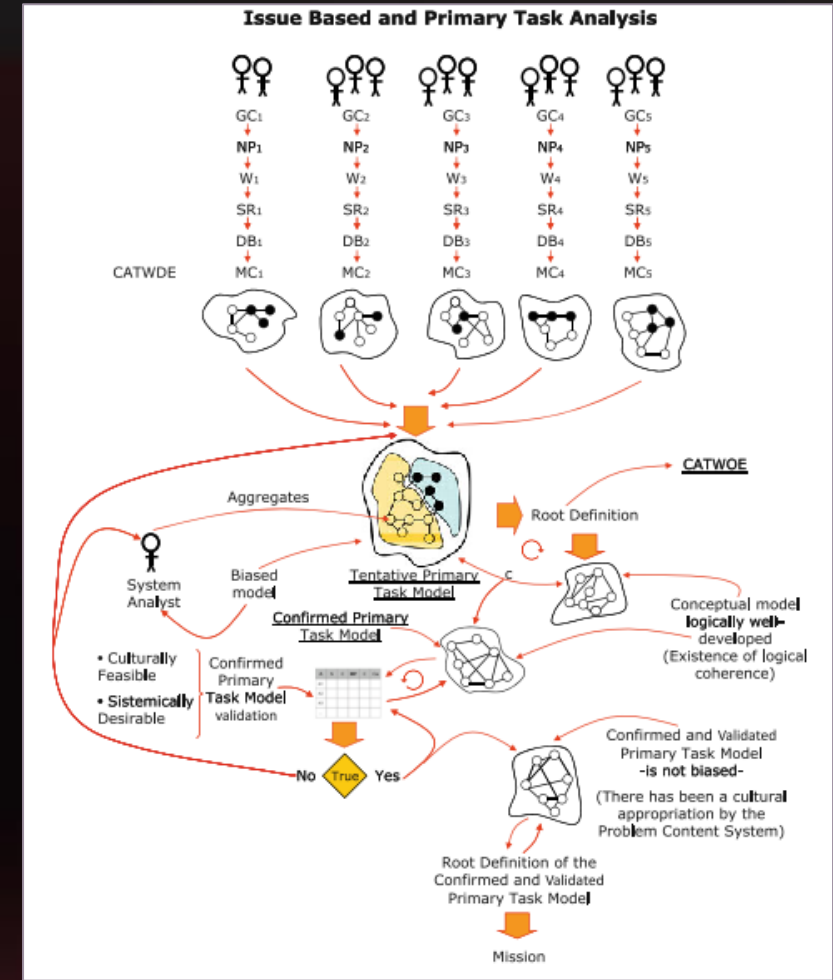
Graphic description of the situation under study (reference system and its environment).

2. Structured Situation (Rich Picture)



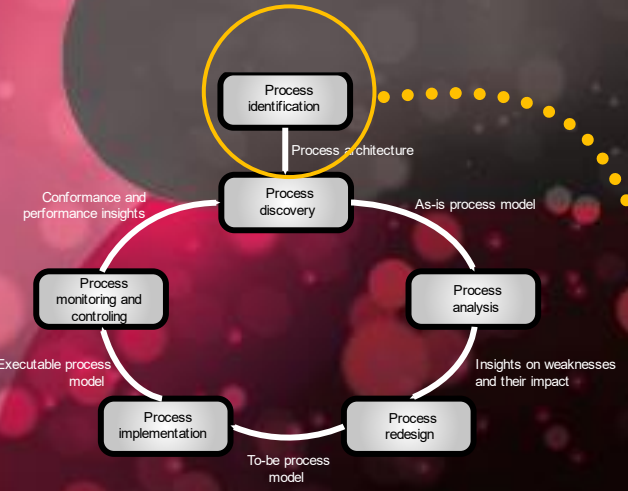
3. IB&PTA approach (from Wilson's SSM Variant)

Wilson variant of the SSM

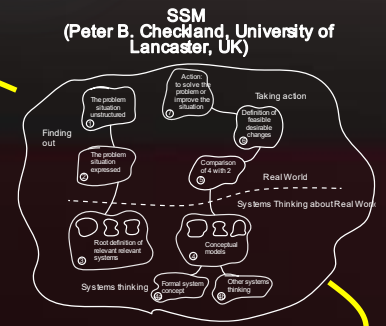
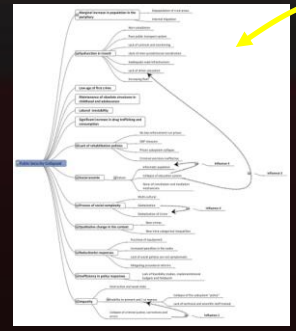


3. IB&PTA approach (from Wilson's SSM Variant)

4. Do the BPM's Process Identification Stage (Stage 1)

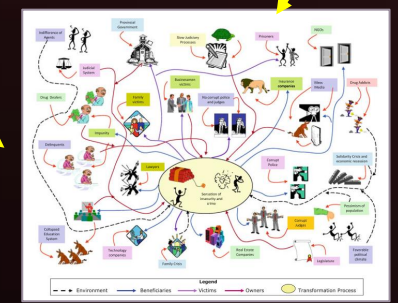


4.1 Unstructured situation

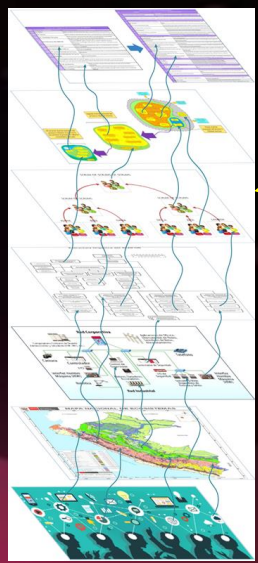


4. Do the BPM's Process Identification Stage (Stage 1)

4.2 Structured situation



4.4 Process Architecture

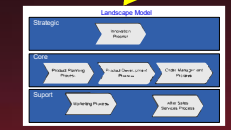
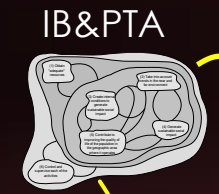
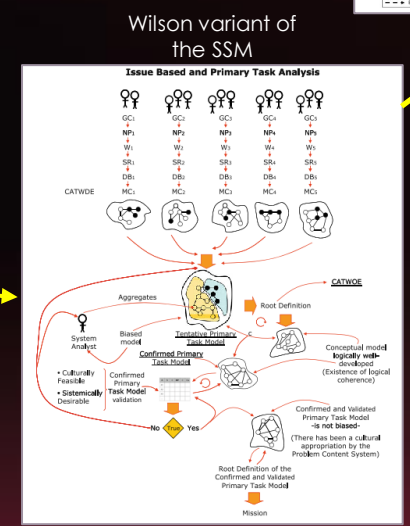


SMKCM (R.Rodriguez Ulloa, 2018)

- SMKCM LAYERS
1. Processes
 2. Knowledge Categories
 3. Projects
 4. Organizational structure
 5. Georeferenced knowledge
 6. Organizational Learning
 7. Computer Applications
 8. Technological infrastructure

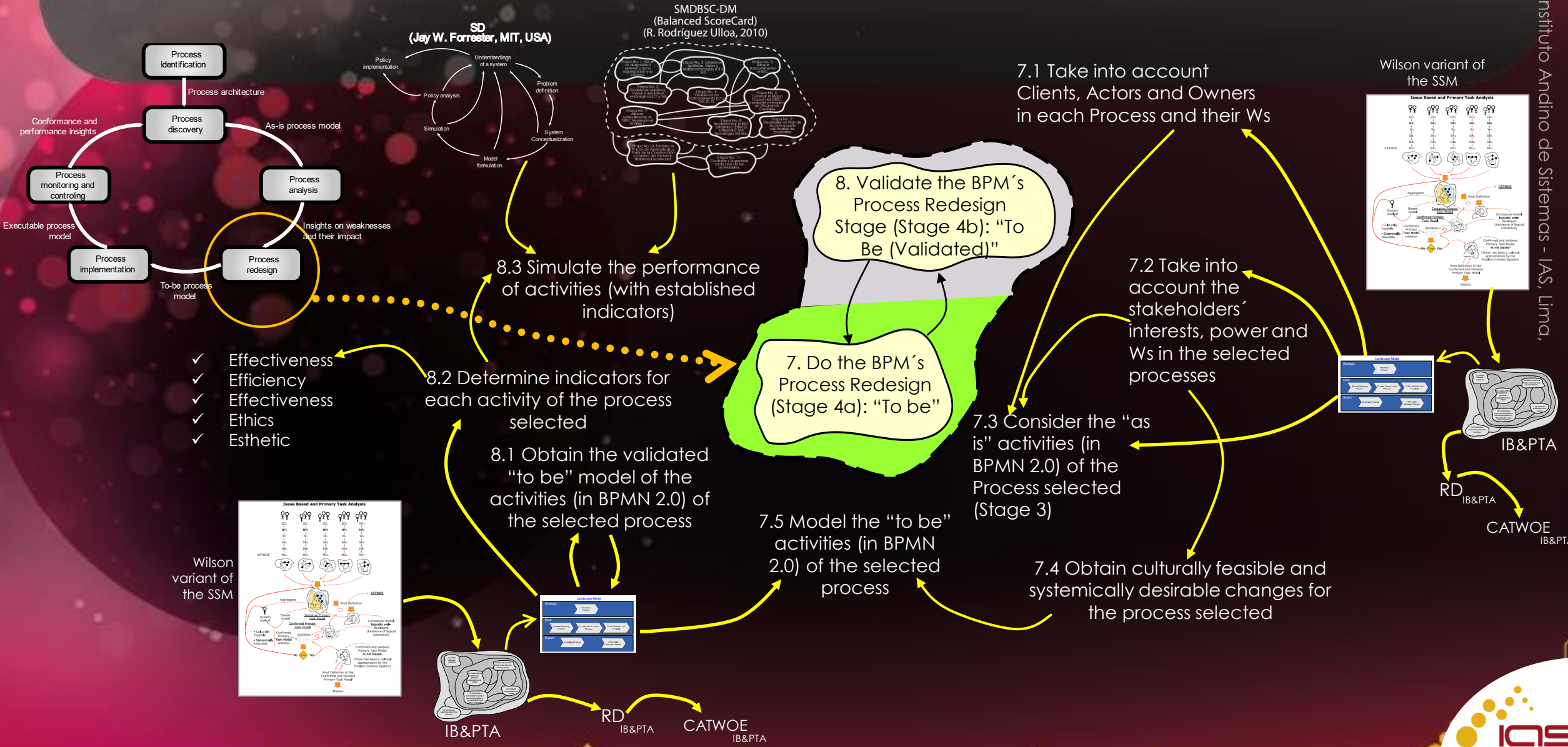
Based on the Hypertext Organization (Nonaka & Takeuchi)

4.3 Issue Based and Primary Task Analysis (IB&PTA)

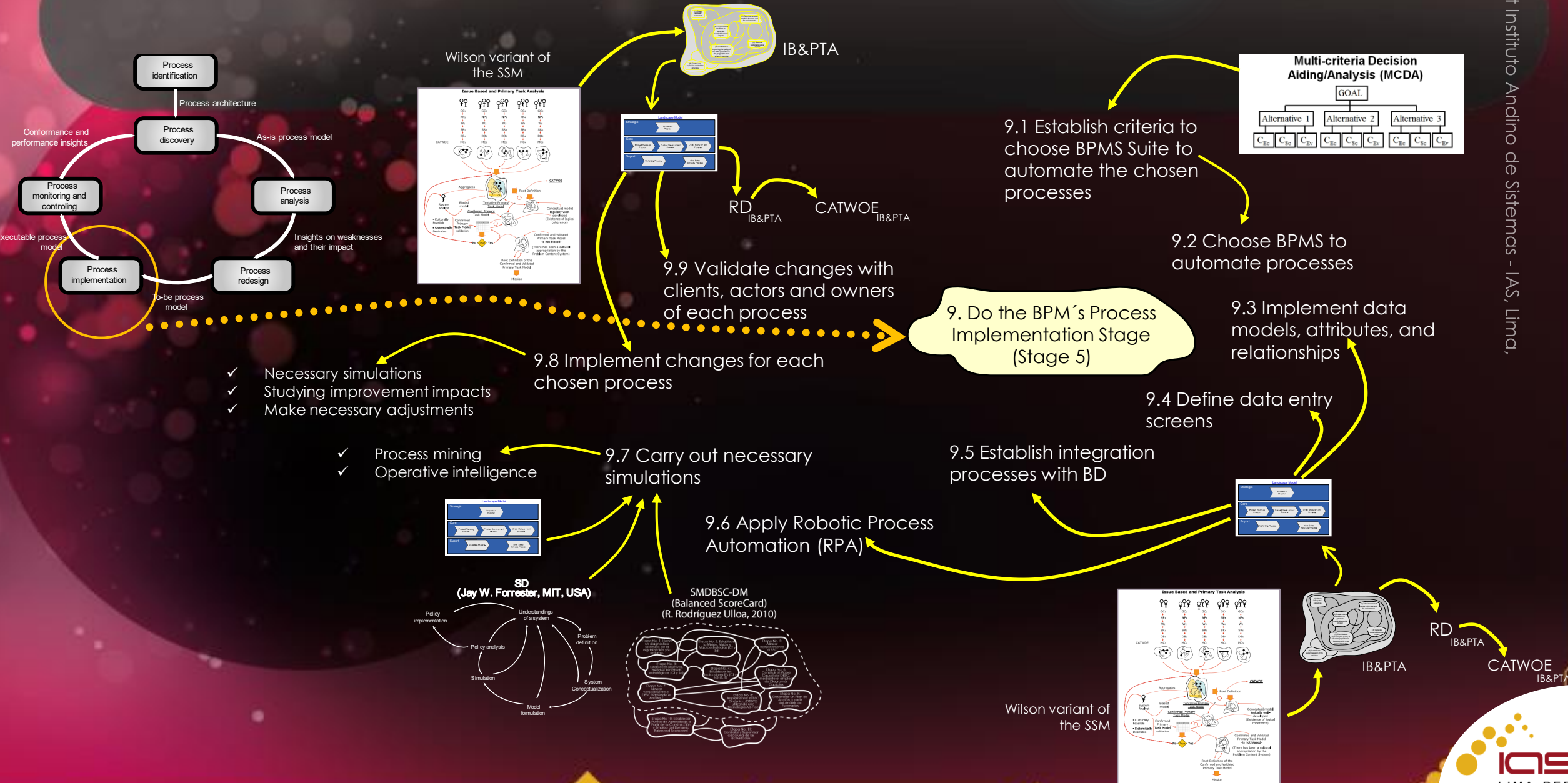


RD_{IB&PTA}
CATWOE_{IB&PTA}

7&8. Do the BPM's Process Redesign (Stage 4a&4b): "To be"



9. Do the BPM's Process Implementation Stage (Stage 5)



6: CONCLUSIONS

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- ▶ It opens a new research arena in the BPM industry, considering the contribution of Systems Thinking for improving the BPM Cycle Life.
- ▶ System Dynamics and SMDBSC-DM, (Rodríguez Ulloa, 2010) allows to determine the performance of processes and organizations, along time.
- ▶ **Soft-BPM Methodology** applies a systemic nominalistic-phenomenological and hermeneutic approach for studying and implementing digital transformation in organizations.
- ▶ It also considers information technologies, intelligent systems and procedures based on agile project management.
- ▶ **Soft-BPM** provides a more participatory, flexible, efficient, effective, viable (Culturally Feasible and Systemically Desirable) and less restricted methodological framework than the traditional BPM approach.
- ▶ Is important to mention the worthy contribution of the **SSM Wilson Variant** in the conception of Soft BPM.

THANKS!



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