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Monographic

Digitise your productive activity with **Business Process Management**

March 2025

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GOBIERNO DE ESPAÑA · MINISTERIO PARA LA TRANSFORMACIÓN DIGITAL Y DE LA FUNCIÓN PÚBLICA · SECRETARÍA DE ESTADO DE DIGITALIZACIÓN E INTELIGENCIA ARTIFICIAL

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01.

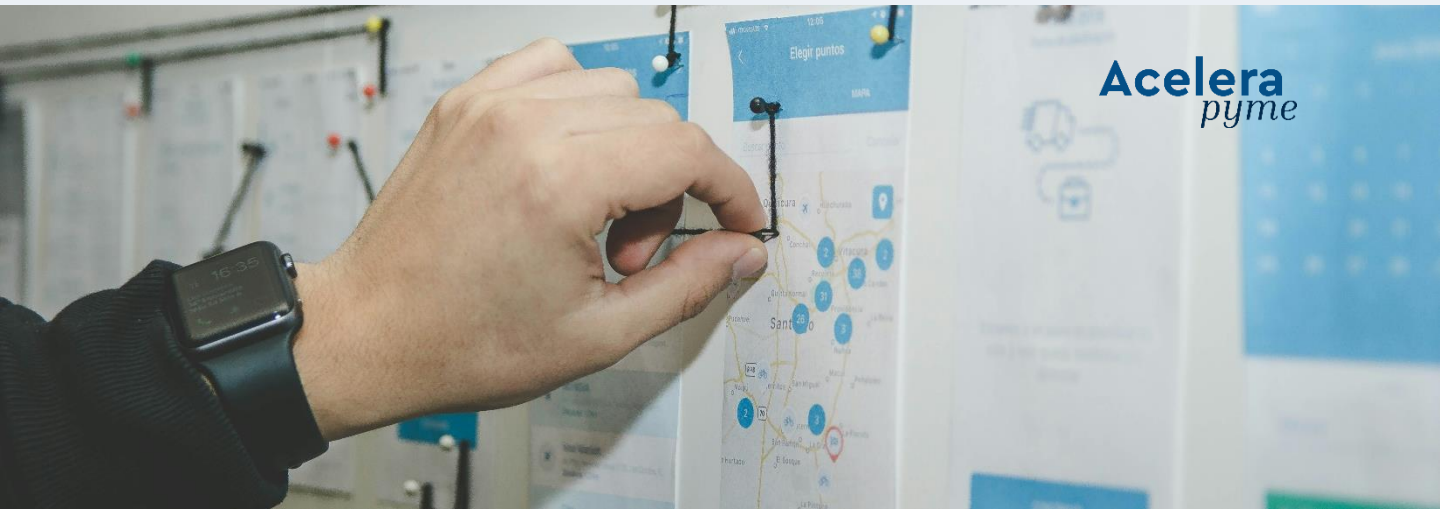
Introduction

The non-renewable resource per excellence is time. To optimise its use, a very helpful tool is **Business Process Management ('BPM' for short).** According to Gartner, this is defined as a discipline that employs various methods to discover, measure, improve and optimise an organisation's business processes **[REF-01].** In addition, this methodology helps to **coordinate the activities of personnel, the organisation's integrated systems and the management of information**, with the aim of achieving the expected results with the least possible consumption of resources.

The implementation of Business Process Management offers an integral improvement to the organisation, specifically in the **creation of interdepartmental business processes**, the **monitoring** and **optimisation** of processes, and the identification of improvement opportunities that contribute to the overall growth of the company **[REF-02]**.

In recent years, the use of BPM has grown considerably, with its use becoming increasingly popular among organisations around the world. According to a McKinsey study in 2020, two-thirds of companies were at least implementing an **automation pilot** and, of these, **57% decided to opt for the implementation of a business process management system** [REF-03].

In short, BPM **enables the optimisation of the time available** in an organisation, as well as the distribution of work among employees and the **monitoring** of existing processes.



02.

What is Business Process Management and what are the benefits?

To understand how Business Process Management works, it is important to define **what a business process is**. A business process is a sequence of tasks or activities that are performed in an organisation to achieve a **specific organisational goal** [REF-04]. As an organisation grows, these processes become more complex, either because there are **more operations** within the organisation or because there is a greater demand for products or services from customers.

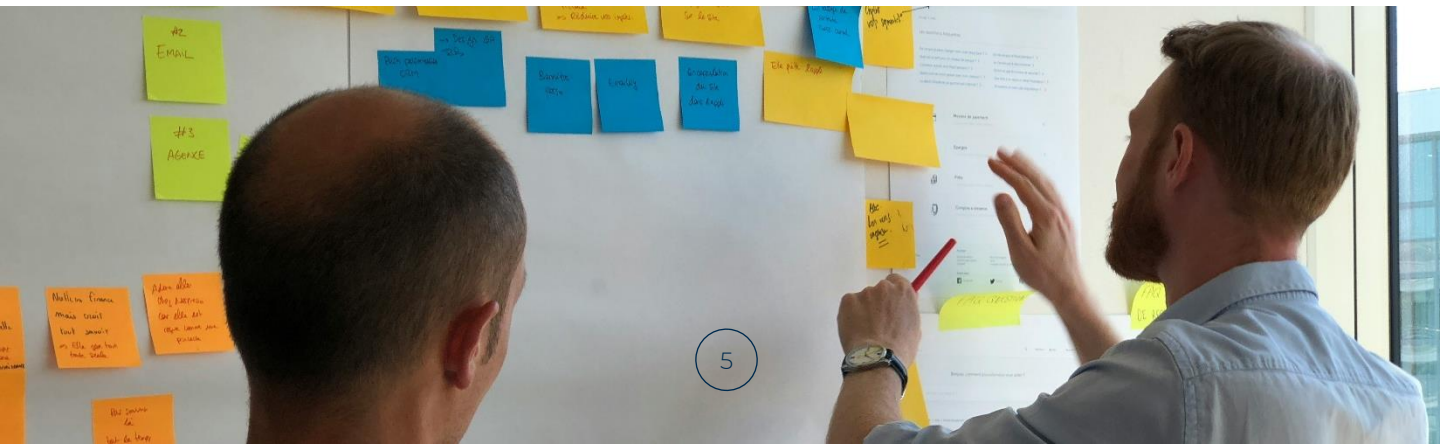
Therefore, Business Process Management (BPM) encompasses the management of processes in the organisation, not only internal work, but also the relationship with customers. However, there is no universal BPM, but several types, each tailored to the **specific needs** of the organisation. The most prominent are the following **[REF-04] [REF-05]**:

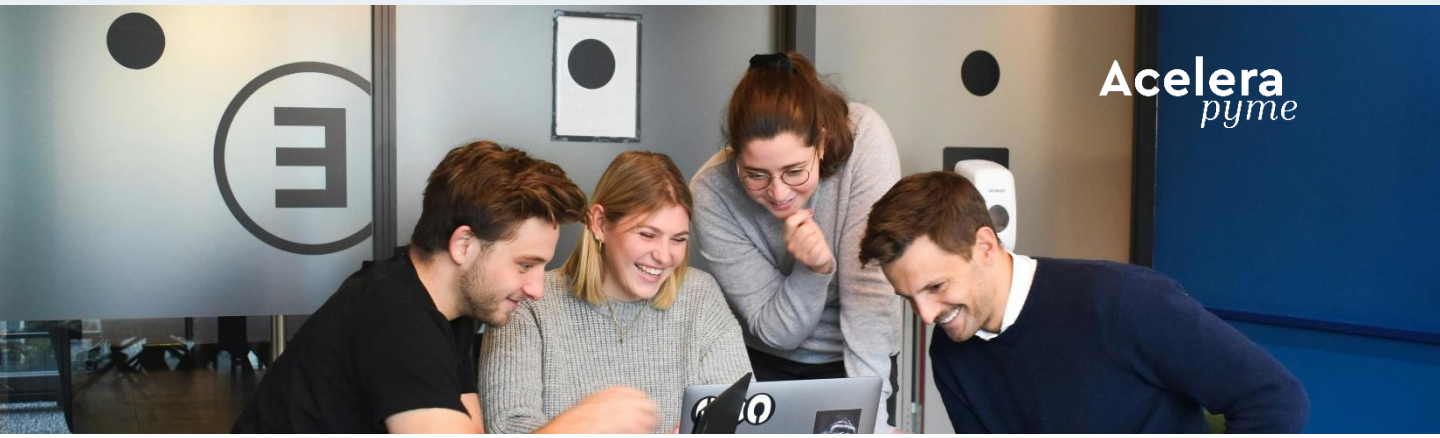
People-oriented: In an organisation, many processes or decisions cannot be automated but require the approval of a person. In these cases, the objective is to **enable the monitoring of a process** through a system of notifications and traceability that helps to track all the actions that make up a process, **reducing the time invested** in its verification.

Document-oriented: This approach focuses on ensuring that the company's documentation **complies with internal and external regulations**. An example would be a law firm that requires signatures from multiple parties. In this case, **BPM can be used to monitor the status of documents**, ensure compliance, and streamline document management.

Integration-oriented: Based on the integration of different applications that an organisation may use, such as ERP or CRM, allowing users to **access each of these tools** through the same interface. This allows for greater connectivity between teams within the organisation and increased productivity.

BPM´s wide scope offers several opportunities to improve the performance and activity of an organisation in many areas. These benefits can be internal or external, depending **on the area in which the improvements resulting from its implementation are detected**.





02.

Internal benefits

The internal benefits of Business Process Management (BPM) are related to the **optimisation of processes and the improvement of work results** within the organisation. In other words, they include all those advances that have a direct impact on the operational efficiency and internal management of the company. Some of the key benefits are **[REF-05]:**

Automation of repetitive processes: using specific tools within BPM, such as **robotic process automation** (RPA), it is possible to save time and use it for higher impact activities.

Removal of bottlenecks in the workflow: the application of BPM allows for greater clarity in the communication between teams, as well as a more agile handling of information, which helps to always maintain a continuous workflow.

Increased accuracy: thanks to the information and content checks performed by the BPM, it is possible **to make more accurate decisions**, increasing the probability of success of an action and improving the quality of the outcome.

External benefits

The external benefits of Business Process Management (BPM) are reflected in the **customer experience and in the quality of the service offered by the company**. Although these positive results are the consequence of a correct application of BPM internally, its impact is directly perceived by external agents, such as customers and business partners. This is the main difference with internal benefits. Some of the main external benefits are the following **[REF-06]**:

Reduction in waiting times: communication with customers can be automated through different channels, allowing SME workers to focus on more analytical tasks.

Personalisation of offers: if the BPM is fed with customer preference data, it is possible to send them **promotions tailored to their interests** without the need to manually review and update the promotions sent to them.

Streamlining the sales process: another function that the BPM can perform is to **automate quotations**, that is, to offer a sales price to the customer **without the intervention of the human factor**. To do this, it is necessary to comply with **three assumptions**: channeling the customer's request through specific forms, validation of inventory availability, and price calculation of the material requested by the customer.

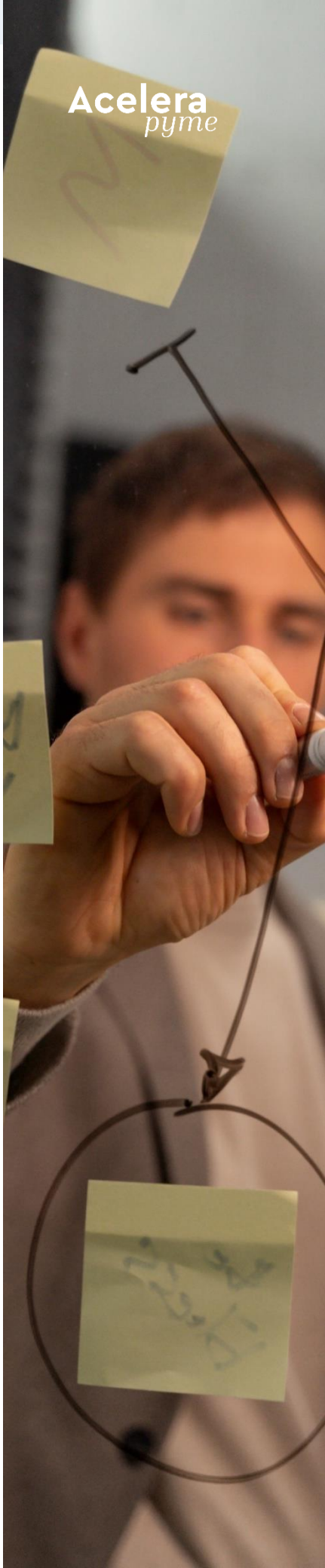
03.

Phases of BPM implementation

The integration of BPM in a company responds to a **strategic decision**, aimed at making operations more efficient. Of course, the reason to use BPM is the management of very large organisations, **but it can also be applied in Small and Medium Enterprises (SME)**. It is not the number of employees or teams that determines the need for BPM, **but the absence of clear protocols and inefficient process monitoring** [REF-07].

SMEs often face problems such as **manual follow-up of communications, excessive dependence on human review** for each action or lack of communication between departments. In this context, the adoption of BPM, especially in start-ups, facilitates the **construction of a long-term sustainable business model** and allows teams to spend more time on strategic and higher value-added tasks.

To ensure an effective implementation and achieve a positive impact, it is essential to follow a series of structured phases. Broadly speaking, the process of adopting BPM in an organisation is divided into **five key stages** [REF-08]:



01. **Design and goal planification.** Before implementing BPM in an organisation, it is necessary to answer the question **“what is it needed for?”**. Otherwise, the tool will be wasted and may further complicate existing processes. For this phase, it is a good idea to **contact** stakeholders, primarily **employees and customers**, to identify areas for improvement.

02. **Process modeling.** This consists of the **schematisation** of the current process and the resulting process once the improvements have been applied, considering as many variables as possible, **such as tasks, times, information and workflows**, among others. Ideally, this chart should be presented to the team in charge of implementing the selected BPM solution.

03. **Pilot testing.** Before implementing the tool in its entirety, it would be convenient to test it in a specific team, or in a specific section of the whole process, to check if there are any pending adjustments.

04. **Monitoring.** Once the pilot has been executed and it has been verified that it has worked correctly, the improvements in the process should be measured.

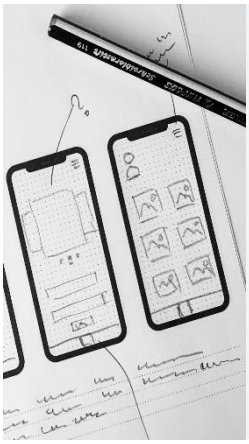
05. **optimisation and continuous improvement.** After applying the necessary adjustments in the monitoring phase, the BPM can begin to have an impact on the organisation, always leaving room for a **periodic review of its performance and the results obtained**.

04.

Requirements for BPM implementation

In addition to complying with the phases established for installing GMP in an organisation, certain conditions must also be met to ensure its proper functioning. These conditions can be grouped into two categories: **material and organisational.**

As for the material conditions, it is sufficient that a **technological infrastructure** exists within the company, in addition to the **capital** necessary to acquire these programs. organisational conditions refer to the presence of certain **roles** within the organisation, with well-defined functions. Since there are several stages in the implementation of BPM, and each of them has specific features, **they should ideally be handled by different employees**. Consequently, it is recommended that a team in charge of BPM development in an SME be capable of performing these functions **[REF-09] [REF-10]:**



01. Process design

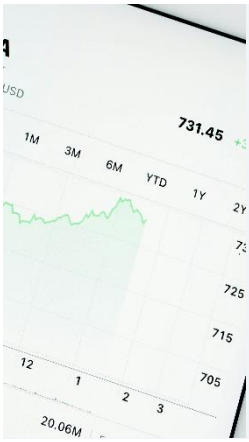
Its mission is to **visually depict** the flow of the entire process covered, as well as the personnel involved in each stage of the process. With this, the entire organisation can have a panoramic view of the work, which helps to reduce waiting times and inconsistencies in teamwork.

02. Data Analysis

Through an evaluation **prior to the installation** of the BPM, it is possible to make future comparisons to **measure the success** of the selected tool. A way to measure this success is by establishing **key performance indicators** (KPIs) to know what has been the impact of the tool.

03. Quality control

Its purpose is to **adapt the BPM tool to the company's objectives**, so that the work is oriented to offer a quality product or service to the customer, as well as to improve business performance.



04. Business analysis

Designed to **identify** areas for improvement of the existing process. In addition, it also helps to define strategies and think of **data-driven solutions**, ranging from optimising a workflow to improving the user experience.

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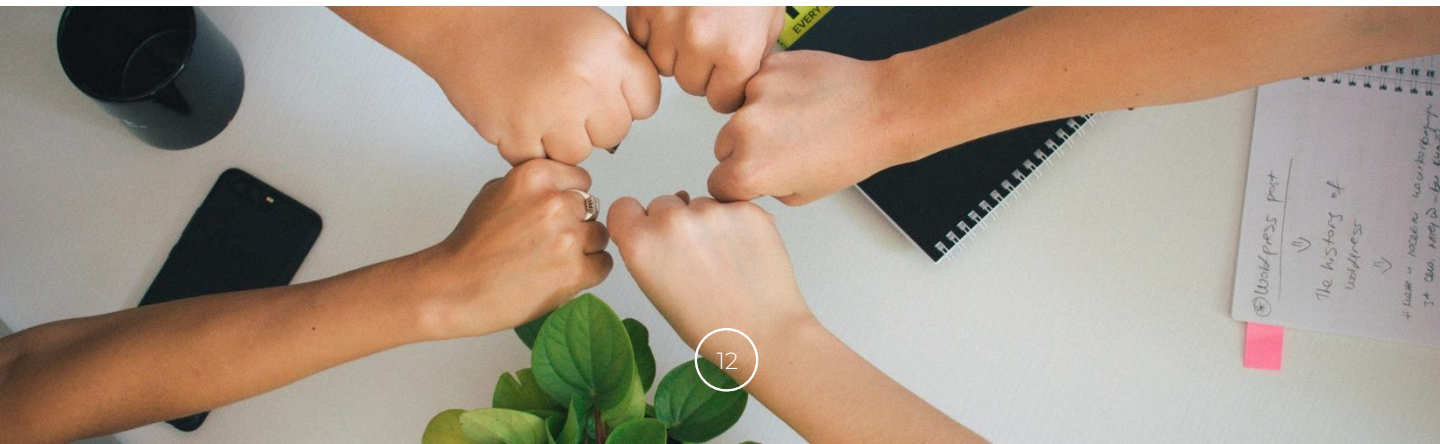
05. Solution design

Provides **technical support**, especially to ensure interoperability between existing applications in the organisation. For the performance of this function, it is advisable to have a **solutions architect** or other profile with IT skills.

Once the selected BPM solution has been programmed, the work of the BPM team will be mainly that of **continuous evaluation and adjustment**, detecting possible future failures or finding ways to further optimise the current process.



05.

Areas of greatest impact on SMEs

While business process management (BPM) comprises the entire organisation, from product or service design to delivery, its impact is **particularly noticeable in certain areas**. This is due both to the nature of the processes involved and the perceived benefits compared to other departments. Some departments where the application of BPM has a special place are the following **[REF-11]:**

Content creation

BPM integration with content management systems (CMS), copyright and content distribution facilitates control over relevance and appropriateness of publications

Customer service

BPM can centralise certain customer inquiries and handle them automatically, relieving staff workload and allowing them to solve other tasks.

Human resources

With the help of BPM, it is possible to design a sequence of steps for document verification of the company's employees or new acquisitions. These sequences are entered, and then the BPM automatically executes them.

Order management

Companies can use BPM to identify value propositions, retain customers and meet deadlines, with the goal of meeting user expectations and generating greater customer satisfaction.

It is essential that there are **channels of communication** between departments, in order to create a **joint strategy** aimed at overall success.

06.

BPM Operability: what tasks can it perform?

The range of tasks that can be integrated into the BPM is very wide. However, there are some examples that help to understand **how the work can be simplified** by using this tool **[REF-12]:**

Customer experience tracking. An effective way to know what the quality of the product or service offered to the customer is, is to **ask the customer** how his experience has been. However, contacting the person can be difficult, since there is a high probability of not getting a response. The solution in these cases is to instruct the chosen BPM software to establish contact with the customer based on a **set of criteria**. These criteria include waiting days to contact, contact channel (call, SMS messaging or email), **and regularity of the customer**. This is an example of how a BPM can benefit a company's **sales**.

Loan applications and investments. It is possible to design a procedure by which loans and investments can be requested. With this information, the BPM can **automate the procedures and evaluate the fulfillment of requirements, the waiting time for approval and the amount of money needed.** For this to work, the chosen BPM system needs to have a **risk management** platform.

Publication of blog content. It is possible to **program the publication of materials** in the organisation's official channels, as long as a clear workflow is established; it is advisable to establish a writing phase, a review phase and a publication phase, so that the BPM tool can know which criteria must be met in order to publish.

Personnel selection processes. When a company receives multiple applications for a position, the BPM can facilitate an objective and automated evaluation. By defining criteria such as skills, work experience, educational background and key competencies, the BPM can analyse the degree of compliance of each candidate, streamlining decision making and reducing the time spent reviewing applications.

Evaluation of personnel performance. One BPM functionality is performance monitoring, also called tracking software. With this, it is possible to evaluate an organisation's personnel constantly and accurately based on established metrics, which helps to perform an impartial follow-up of the work, minimising **human bias** within the process.

To exploit all these functions, it is necessary to **provide instructions and information** to the tool in charge of managing the company's business process, as well as to choose a tool that covers the most relevant points for an organisation.

07.

Recommended tools

There are multiple **business process management tools** on the market, each with **different approaches and functionalities**. Some focus on the automation of specific tasks, others on workflow management or decision-making optimisation. Below are two recommended options for SMEs, highlighting their main features and benefits:

Flokzu

It is a **cloud-based** BPM platform that stands out for its ability to integrate with financial and accounting management applications **[REF-13].** It offers functionalities such as automatic invoicing, general accounting of the company, generation of customised reports on the financial situation of the organisation, among others.

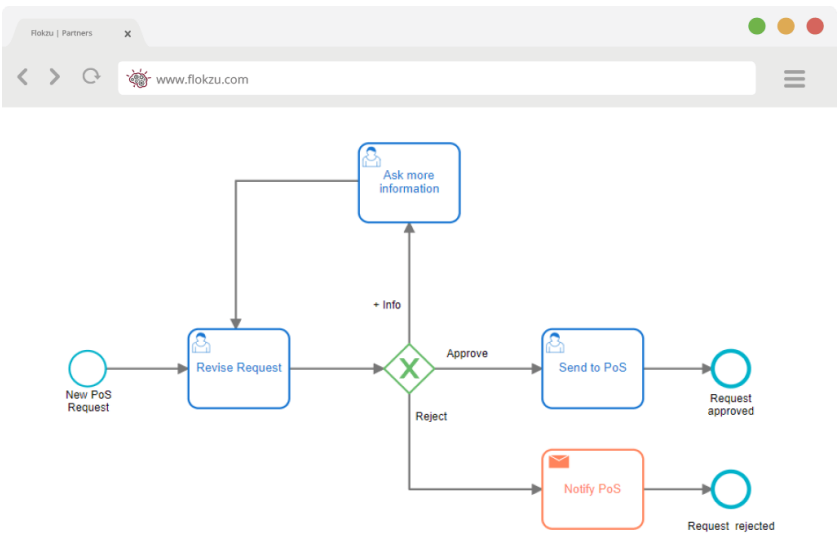


Image 1: Diagram of operation of "Flokzu"

*Source: Flokzu **[REF-13]***

Although its specialty is financial management, this software can also cover other areas, such as **human resources, sales, customer service and even education**. Therefore, it is a useful tool for almost any activity that an SME can engage in.

This tool is characterised by having its **own library of courses**, allowing users to learn more about the use of BPM systems. In addition, according to data from the platform itself, its clients **have increased their productivity by 40%.**

It does not have a free or trial version, but it has a complete basic plan that allows **unlimited database management and offers 10 Gb of storage.** This plan costs €17 per user per month, while the Premium plan costs €22 per user per month; both require a **minimum of 10 users.**

Cflow

It is a software characterised by being totally **no-code**, i.e., it does not require the use of programming languages at any time once it has been installed in the technological infrastructure of the SME **[REF-14].** In addition, it also has the advantage of **integrating with external tools**, such as Office 365 or G Suite, which allows coupling the pre-existing work with the new system.

It has several unique features, most notably **document customisation**, which allows documents or forms to be tailored to the needs of the SME. Another powerful function of Cflow is the **management of employees' time,** ranging from their arrival and departure times to the planning of vacations, allowing the pending work of a worker who is off work to be **automatically delegated to another member** of the organisation.

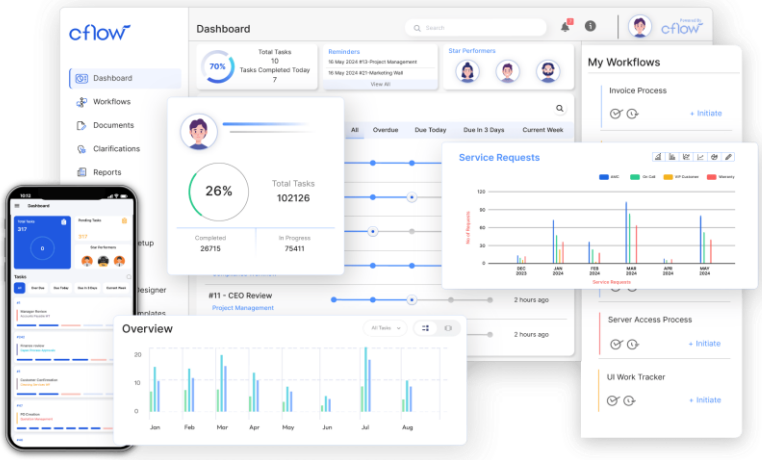


Figure 2: "Cflow" Interface
Source: Cflow ***[REF-14]***

There are three plans to choose from, the cheapest being **11 euros per user per month**, and with an annual billing period; a minimum of 10 users is required for this plan. On the other hand, the next plan amounts to **16 euros per user**, requiring at least 20 members. The most comprehensive plan is for organisations with more than 100 members, and does not have a standard price, but requires a tailored budget.

08.

Conclusions

Business process management offers a better vision to SMEs, not only to make a better diagnosis of their current processes and improve the efficiency and quality of their work, but also to promote the **integration of technological tools** and take the step towards less analogical production models. The strength of BPM is that it can be expanded as much as the company decides, being able to cover many particularities, from the management of human resources to the relationship with third parties.

However, given its complexity, it is **highly recommended** to have a specialised team to identify the areas in which it is necessary to implement a BPM system, as well as to **maintain constant communication** between the company's management and its employees to inform them of the changes to be made, as well as to detect possible blind spots from the information given by all members of the organisation.

In short, BPM is a tool that can bring a lot of benefit to an SME that does not yet have its processes well defined, helping it to **schematise all its activity**, from its workflows to resource management. If complementary tools are added to this, such as artificial intelligence or **business process automation**, the benefits for the SME will be much more noticeable.

09.

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