



## Scoping a Process with BPMN

by Adrian Reed

When modeling a process it can be difficult to know where to begin, particularly if the existing process is conducted in an ad-hoc or inconsistent manner. In this article, we discuss how identifying the start and end points, and building our process knowledge iteratively, can be useful.

One challenge when modeling processes can be knowing where to start, and how much detail to include....

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Quite often when modeling a process for the first time we might find that the existing situation is quite 'messy'. A set of practices may have evolved over time, with little consistency, and with different people undertaking the work in different ways. Some individuals may be more efficient than others, and we might find that there are some very diligent staff members who are essentially propping up the whole process. In a situation like this process analysis will help to highlight the differences, and process modeling will help us to work with our stakeholders to draw up a 'to be' process that is consistent and effective. However, with so many different views on the process, where do we begin?

A very useful starting point for any discussion about process is to determine the start and end events. The start event (or events) are actions outside of the boundaries of the process that cause it to start, and the end event represents the point at which the process ends. This probably sounds rather abstract, so let's take an example. Imagine we were examining the processes that a cashier in a supermarket must respond to, as we were planning to improve the technology to make the process quicker. A quick brainstorm might uncover the following types of 'request' that they receive from a shopper:

- Shopper places items on the counter (Sale Requested)
- Shopper asks for refund (Refund Requested)

- Shopper asks where a particular item is located (Help Requested)



There would be many others too, but these could be interpreted as three different ‘events’. In this case these would likely trigger three different processes (‘Sell Items’, ‘Refund Customer’ and ‘Locate Item’). Understanding the events that processes need to respond to can be a very useful way of starting our process analysis work.

Having identified the start event(s) of the process that we are wishing to examine, we can then identify the end points. What will be true after the process has completed? If our process is ‘Sell items’ we might conclude that the following things could happen:

- Customer Paid & Sale Complete
- Sale Cancelled

Discussing start and end points can create very useful conversations about the scope of the process—and having these boundaries defined up-front will help us to build up the detail of the process. By knowing where we start and where we can end, we can work out all of the routes in between. Both events are represented by the BPMN symbols below.

These ‘generic’ events are known as ‘none’ events—the notation provides ways of denoting more detail here too (for example, if a process starts when a message is received, there is a particular symbol that is used).

	Start Event
	End Event

Once we have identified the start and end events we can start to iteratively sketch out the flow of the process. We might start with just a few boxes, as illustrated in the following rough and imperfect diagram:

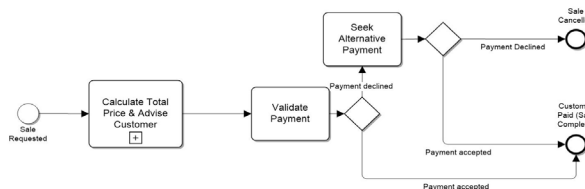


Figure 1: An initial ‘rough’ BPMN diagram that might create discussions and be iteratively built upon and improved.

Here we have a ‘collapsed sub process’ (Calculate Total Price & Advise Customer). This tells us that there is more detail which isn’t shown in the diagram. Using sub processes helps us to show and hide relevant detail.

Here, for example, we see that the process implies that the customer is only asked for alternative payment once, and if this fails the sale is cancelled. Is actually the case? We might also ask whether there are any other scenarios in which the sale is cancelled.

These issues might seem unimportant if a human is undertaking the work (as they will use judgement), but if we are implementing technology (e.g. self-scanning tills) it might be important, else we build in rigidity that might make things less flexible and usable!

Over time, we can build in further insight to the model iteratively, making it richer and more complete. BPMN allows us to create different ‘views’ of the same model, meaning that we can show different stakeholders the detail that is relevant for them. This is very useful when we come to validate the model.

In summary, using a shared notation such as BPMN can be a useful way to scope out a process. An excellent starting point is to identify the start and end events and then build out the process from there.

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