

[Building on a BPM framework: Can it work for DCM?](#)

Dynamic Case Management (DCM)

[Topic Description](#)

Building on a BPM framework: Can it work for DCM?

By Christine Parizo, ebizQ Contributor , 01/27/2012

In a constantly changing world, [dynamic case management](#) (DCM) is becoming a viable solution for more and more companies looking to streamline processes and increase efficiency.

Because software plays such a large role in such efforts, experts say that it's critical to choose the right technology for your company, especially in terms of a framework that could potentially make or break a DCM implementation. But it's also important to recognize that some of today's vendors are wrapping their business process management (BPM) framework in DCM bows, which may or may not work for a particular industry or company.

PERUSING PRODUCTS DESCENDED FROM BPM

Companies should examine BPM packages for DCM applications with their eyes wide open. "There is nothing that precludes a product [with a BPM] heritage [from providing DCM]," says industry analyst [Neil Ward-Dutton](#), founder and research director of MWD Advisors. However, BPM doesn't necessarily provide support for many functions necessary for true DCM. "The individual process fragments or tasks can easily be defined in BPM, but you need support for a lot of other things that BPM doesn't really describe," Ward-Dutton says.

Software architect and entrepreneur Max J. Pucher agrees that software must go beyond BPM to really carry out the business's goals. "The principle architecture of DCM must be provided by the platform, as otherwise it becomes a complex development project," says Pucher, who is also a contributor to *"Mastering the Unpredictable: How Adaptive Case Management Will Revolutionize the Way That Knowledge Workers Get Things Done"* (Meghan-Kiffer Press, 2010). "To step beyond simple BPM, it is necessary to define a business architecture with strategy, value streams and capabilities."

In addition, "what you have to watch out for is that you're not just going for a tool that is very focused on [BPM], structured process modeling and execution, because then you will find that any support for [DCM] might actually be quite limited," advises Ward-Dutton. A BPM tool may give architects and developers the ability to define some unstructured, dynamic processes. However, cases tend to be more flexible than standard BPM architecture allows, and the software used to move these cases through to completion needs to have that kind of flexibility.

USING BPM FOR DCM

Despite some flexibility, BPM software is really isn't designed for DCM, experts say. Among the problems with using a BPM architecture in DCM is its linear nature, which typically requires completing one step in a process before moving to the next. In fact, BPM products traditionally use a single-process description to drive an item to completion, and all routes must be mapped out beforehand, according to Forrester Research's [September 2011 DCM report](#), "Dynamic Case Management: Definitely Not Your Dad's Old-School Workflow System."

"If you've got an investigatory case management system being used in law enforcement, with no foreseeable end of life, it's just being driven by a series of events," says Nathaniel Palmer, executive director of the [Workflow Management Coalition](#), an industry group. "The first event is crime, and the subsequent events are the investigation, and eventually [you reach the] conclusion of that investigation. If you can't preprogram when it's going to conclude, then that doesn't really work with a BPM system."

Sometimes, starting with a BPM architecture doesn't make sense for a company, period. "The principle architecture of

ACM/DCM must be provided by the platform, as otherwise it becomes a complex development project,” Pucher says.

The different types of input into cases can also be problematic for DCM architectures built on BPM platforms. DCM requires the ability to collect different processes and tasks under one case, and architecturally, these are different kinds of input. It’s something to watch out for if you’re looking at something with a BPM heritage, says Ward-Dutton.

With all that said, it’s possible to build a DCM architecture from a BPM product, as DCM is a natural extension of BPM—just not a good parallel component. “DCM is a more advanced form of BPM that provides technology empowerment,” says Pucher. “It is goal-oriented and goal-verifying and links processes explicitly with outcomes, targets and objectives. It is mobile and employs social technology. While it is possible to employ a BPM system and [DCM] side by side, that makes no sense in the long-term.”

WHERE BPM WORKS WELL FOR DCM

Not every case needs to be architected with a preprogrammed conclusion, and in that respect, a BPM-based framework for a DCM implementation could work very well for some companies. “You can have processes that don’t need to be fully defined in advance, that allow for the management of directional changes that allow for long-lived processes,” says Palmer, who is also the chief BPM strategist for [SRA International](#).

“One of the advantages of a very structured process management and design of a solution around something like [BPM] and one of those engines and platforms that are becoming increasingly popular is that there’s a lot of methodology and practice in the industry,” says Ward-Dutton.

Because of BPM’s successful use with Six Sigma, Lean and similar methodologies, the architecture can help companies take a high-level problem and break it into a process design. But essentially, you need to be able to preprogram when the case will conclude, or it won’t work with a BPM-based system, Palmer says.

THE CRM COMPONENT IN DCM

Because of case management’s service-resolution aspect, executives may make the leap to [customer relationship management](#) (CRM) software instead of DCM. “Not coincidentally, a lot of CRM [vendors are] positioning themselves as case management solutions,” Palmer notes. But DCM goes beyond what CRM can do, so companies should exercise due diligence when evaluating CRM products to plug the DCM group.

One thing to keep in mind is that many DCM vendors already have experience building BPM or [enterprise content management](#) (ECM) products. According the Forrester report, these vendors may have enhanced their BPM or ECM products that provide a bit of runtime adaptability. Depending on the intended use, this may be sufficient.

Bottom line, experts say: Look carefully at your company’s processes and its intended use of the DCM suite. If you’re fairly certain that you don’t need the flexibility that true DCM products offer, then a BPM-based architecture may sufficiently address your requirements. As with any successful software implementation, considering the big picture, assessing needs and knowing what to expect are keys to success.

READER FEEDBACK: This story tackles the question of whether a BPM-based solution can fulfill your case management requirements. If you’ve faced this decision, what did you decide--and why? We’d love to hear about your experience. Please e-mail Site Editor Anne Stuart (astuart@techtarg.com).

About the Author

Christine Parizo is a freelance writer specializing in business and technology. She’s based in West Springfield, Mass. Contact her at christine@christineparizo.com.

[More by Christine Parizo, ebizQ Contributor](#)