

Generic Template - BPM Workbreakdown Structure

Phase	Workstep #	WBS Element	Typical Duration	Typical Output or Deliverable
Assess Phase			4-12 weeks, depending on scope of initial project	
		Develop understanding of business reasons and drivers for this project		
	1	Define project scope and objectives		
	2	Develop draft project charter		
	3	Clarify stakeholders for the Assess phase		
	4	Establish governance structure		Governance structure
	5	Finalize project charter		Project charter
	6	Develop assessment phase template		Template that is particular to this project
	7	Organize assessment phase team		
	8	Determine what data to gather		
	9	Develop assessment phase workplan		Assess phase workplan
	10	Notify people working in the targeted processes about assessment		
	11	Review and/or develop KPIs and performance metrics		KPI set
	12	Define enterprise-level process map and key process-level maps		"As is" process model
	13	Develop detailed process maps, spaghetti diagrams, interrelationship diagrams, etc.		Output from various analysis techniques
	14	Create interview template		Interview template
	15	Conduct targeted individual interviews		
	16	Conduct selected group interviews		
	17	Assess the state of technology		Technology assessment document
	18	Estimate "improvement" maturity		
	19	Refine list of improvement opportunities		List of improvement opportunities
	20	Estimate financial and operational performance impact		Quantified improvement potential
	21	Link potential improvements to business strategy		Strategy linkage document
	22	Assess organizational impact (vertical silos or horizontal flow) on acceptance for change and improvement		
	23	Finalize current state assessment		Assess phase final document (report and/or stand-up presentation)
	24	Begin to plan for Design phase activities		
	25	Present Assessment phase output to steering team		Presentation to steering team
26	Reflect on Assess phase			
27	Close out Assessment phase		Phase completion letter	

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Phase	Workstep #	WBS Element	Typical Duration	Typical Output or Deliverable
Design Phase			4-12 weeks, depending on scope of targeted process(es)	
	1	Confirm scope of the process to be designed		
	2	Determine skills needed on the design team		
	3	Organize the design team		Formal design team
	4	Clarify stakeholders for the Design phase		
	5	Provide BPM training and assessment briefing		
	6	Determine KPIs and performance metrics that are relevant to process in design scope		Revised KPI set
	7	Evaluate improvement ideas from Assessment phase		
	8	Brainstorm additional improvement ideas		
	9	Estimate degree to which this is process-centric, technology-centric, or combination process & technology-centric project		
	10	Determine how to break the project into logical pieces		
	11	Develop workplan for Design phase		Design phase workplan
	12	Develop at least 3 alternative design concepts		Alternative design concepts
	13	Develop enterprise-level process maps and key process-level maps		"To be" process models
	14	Develop detailed process- and activity-level flows		
	15	Develop enough detail to understand feasibility for each alternative		
	16	Design process improvements for feasible alternatives		
	17	Identify underlying technologies to support new processes		Tentative technology issues
	18	Identify underlying organization structure to support new processes		Tentative organization issues
	19	Review the design alternatives with process owners		
	20	Package top 2-3 design alternatives to take forward into Model phase		2-3 design alternatives
	21	Begin to plan for Model phase activities		
	22	Present Design phase output to steering team		Design phase report/document
	23	Reflect on Design phase		
24	Close out Design phase		Phase completion letter	

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Phase	Workstep #	WBS Element	Typical Duration	Typical Output or Deliverable
Model Phase			1-4 weeks, depending on scope of process and complexity of design	
	1	Evaluate design alternatives for best method to conduct Model phase work		
	2	Firm up the set of KPIs and performance metrics		Firm KPI set
	3	Conduct modeling activity for each design alternative		
	4	Compare modeling results to design expectations		Comparison document
	5	Use simulation techniques, as necessary, to shake down designs		
	6	Conduct model validation		
	7	Evaluate each design alternative for what worked and what did not work		
	8	Verify that design evaluations are data-based		
	9	Select the "best of the best" design components to create new design		"Best of the best" design
	10	Begin to estimate implementation timing and resources		
	11	Develop initial implementation strategy		
	12	Begin to plan for Implementation phase activities		Draft implementation plan
	13	Present Model phase output to steering team		Modeling phase report/document
	14	Reflect on Model phase		
15	Close out Model phase		Phase completion letter	

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Phase	Workstep #	WBS Element	Typical Duration	Typical Output or Deliverable
Implement Phase			2-10 months, depending on scope, complexity, degree of technology, and number of processes	
	1	Confirm scope and project charter		Final charter and scope
	2	Identify core project team		Project team
	3	Confirm core project team member participation		
	4	Develop transition strategies		
	5	Define new management roles to support new processes		
	6	Determine new metrics to reinforce and/or change behavior		
	7	Finalize implementation plan		Implementation plan
	8	Confirm governance structure is in place		Governance structure
	9	Prepare a formal change management plan		
	10	Determine balance of "technology" resources and "business" resources		
	11	Develop communications plan		Communications plan
	12	Develop stakeholder "care-taking" plan		Stakeholder "care" plan
	13	Coordinate with BPM Center of Excellence (if one exists)		
	14	Meet with core team members to make sure everyone knows roles		
	15	Conduct kick-off orientation and training for core project team		Orientation and training material
	16	Develop and execute process to measure "actual to plan" costs		Cost collecting mechanism
	17	Establish milestone review process and dates		
	18	Identify and leverage best practices		
	19	Identify and leverage implementation tools and techniques		
	20	Reinforce "reuse" where appropriate		
	21	Begin to execute implementation plan (unique to each project)		
	22	Anticipate where disruptions may occur and develop contingencies and countermeasures		
	23	Conduct general awareness sessions for process changes (for the masses)		Awareness material
	24	Conduct specific training for people directly impacted by improvements		
	25	Execute communications plan		
	26	Execute stakeholder "care-taking" plan		
	27	Confirm getting crisp closure to project worksteps and phases		
	28	Recognize successful completion of milestones		
29	Reflect on Implement phase			

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Phase	Workstep #	WBS Element	Typical Duration	Typical Output or Deliverable
	30	Conduct phase(s) close out		
	31	Conduct overall project close		Phase completion letter

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Phase	Workstep #	WBS Element	Typical Duration	Typical Output or Deliverable
Monitor Phase			2-8 weeks, depending on process velocity and frequency	
	1	Clarify the role of targeted performance metrics and KPIs in Monitor phase		Monitoring process
	2	Set up process to capture and monitor selected data and KPIs		
	3	Determine/confirm data and KPIs to drive monitor phase		
	4	Identify who will monitor data and KPIs		
	5	Determine process to evaluate deviations for appropriate actions		Deviations process
	6	Interpret and analyze metric information		
	7	Highlight deviations from target or upper/lower limits		Deviation highlights
	8	Prepare report for monitoring phase output		Monitoring phase report/document
	9	Reflect on Monitor phase		
	10	Conduct phase close out		Phase completion letter

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Phase	Workstep #	WBS Element	Typical Duration	Typical Output or Deliverable	
Modify Phase			Estimate is based on number and complexity of modifications		
	1	Develop criteria for modify decision		"Modify" criteria list	
	2	Define "modify decision" process		"Modify Decision" process	
	3	Preliminarily decide if this is "major" or "minor" modification			
	4	Assess magnitude of potential improvement			
	5	Assess risk if not do modification			
	6	Evaluate item relative to other modify items in queue			
	7	Develop method to track modify decisions			
	8	Assess technology's role in modification			
	9	Evaluate portfolio of potential modifications			
	10	Make decision about modify candidate		"Modify" Decision for item	
	11	Communicate decisions to process owners and stakeholders		Communications per communications plan	
		a	<i>For items that are definite "no action":</i> Place item in "no action" category Document decision and "no action" status Archive decision and move on		Decision documentation
		b	<i>For items that are "tabled til later":</i> Place item in "hold" category Document and archive decision Determine if potential exists to bundle with later items Periodically reevaluate "hold" category for revised action/status		Decision documentation
			Move item into "green light" or "no action" categories, as appropriate		Decision documentation
		c	<i>For items that are "green light" to act on now:</i> Place item in "green light" category Document and archive decision Create scope and charter for item Confirm with process owner and stakeholders Depending on size and magnitude of item, loop back through Assess, Design, Model, Implement, and Monitor phases		Decision documentation Scope and charter Execute "mini-project"

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Phase	Workstep #	WBS Element	Typical Duration	Typical Output or Deliverable
		Reflect on Modify phase		
		Close out Modify phase		Phase completion letter
		Close out overall project		Project completion letter