



## Validating “as-is” BPMN Process Models

by Adrian Reed

So, you’ve held some workshops and have produced an ‘as is’ BPMN process model. Before changing it, how can you be sure it represents how the work actually takes place?

In this article, we explore the art of validating process models!

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A common place to start when aiming to manage or improve an existing business process is to analyze and document the status quo. Creating an “as is” process model enables us to see exactly how the work is taking place—warts and all—and can lead on to very productive conversations on how the process might change.

Mapping out an “as is” process in a shared notation such as BPMN is an opportunity for collaboration, with different teams who are involved having the opportunity to see the process from a whole range of different perspectives.

Yet there is a perennial danger awaiting the unprepared process modeler! If we are not careful, we may find that there is a gap between what is said in the conference room and what actually happens when the work is done at the coal-face. This can lead to us confidently making process improvement decisions that won’t work well in reality because we are unknowingly missing a crucial detail.

It is worth exploring why this situation can occur. If we have engaged our stakeholders well, and have created an open dialogue where they feel able to share both bad and good details of their process, then it is unlikely that they will be deliberately hiding information from us. However, often our stakeholders have dozens of years of experience, and they know far more than they realize. This ‘tacit knowledge’

is unlikely to surface during workshops and other elicitation sessions, so there is a risk that it can be missed. This can be alleviated by speaking to a range of relevant stakeholders when modelling and also using a range of elicitation techniques (for example, observation can be very relevant). However, in this article I want to focus on validating an “as is” process.

## Beyond Workshops: The Art of Validation

Having modelled an “as is” process, it is important to get stakeholder feedback and validate that the model is correct. This ensures that any further conversations about the process are based on an accurate and reasonably complete view of the situation. Often, validation is conducted during workshops, with a representative from each area examining their part of the process. “Walking through” a process model in this way is undoubtedly valuable but it is not the only validation mechanism available to us. There are other techniques we can use as well which will help us ensure that we are not missing anything vital, three possible techniques are explored below.

1. Follow the work: Firstly, a way of following (and experiencing) the process first hand is to “follow the work”. Pick a range of different requests or cases and follow them through the organization, and see how closely this matches the model. If you were modelling call center processes, you might sample some incoming calls and examine how they were handled, from end-to-end. If they are passed on to another team, follow them. If the team member isn’t able to handle them and sends an e-mail to a supervisor, follow the e-mail. The aim of this exercise isn’t to criticize those answering the calls—it is to understand whether the process model is accurate

(there may be local workarounds that we are unaware of). This also helps us gain empathy with the customer experience, as we will see first-hand whether the customer receives slick or not-so-slick service!

2. Observation: If following the work is a way of taking a horizontal “thin slice” through a process, observation is taking more of a vertical deep-dive. Sitting with teams undertaking particular parts of the process, observing how they do their work and whether there are any variations can provide a useful picture. We may pick up additional nuances that we were unaware of.

3. Exceptions: It is crucial to talk through exceptions and alternative paths with stakeholders. Often the conversation focusses on the “happy path” and the types of request that come in most frequently. Yet most processes need to deal with quirky situations too. Knowing what these are in advance, and modelling them will ensure that they do not drop from our radar. This can be extended by studying demand more generally, and seeking data on the sorts of cases that need to be considered.

In conclusion, creating an “as is” process model can provide a useful base on which to model and manage the process. When validating a model, we should consider utilizing a range of techniques, potentially including following the work, observation and considering exceptions.

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