

ROLE FITTING

ProcessClick – Your Agile BPM for Salesforce



PROCESSCLICK – ROLE FITTING

Behind every successful BPM project, there is a team of specialized professionals with different skills.

BPM initiatives are not about communicating a change plan, optimizing processes, or implementing an enterprise-wide technical solution; it is about doing all these things at the same time. That's why the setup of your BPM team should reflect this complexity.

With ProcessClick you can easily carry out every kind of implementation, no matter the size of your firm or the complexity of your project.

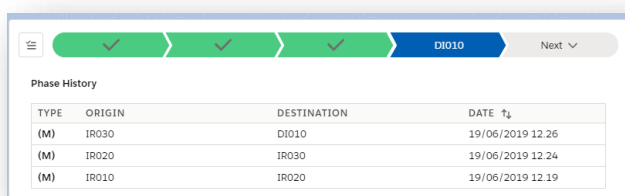
ROLES

Below you will find out job titles and definitions that vary from organization to organization. Different industries, organizations, and working cultures mean that a "one-size-fits-all" role description is difficult to find.

However, a successful project starts with a well-rounded team that leverages all the BPM aspects. Below, an explanation of the main roles involved in ProcessClick usage and adoption.

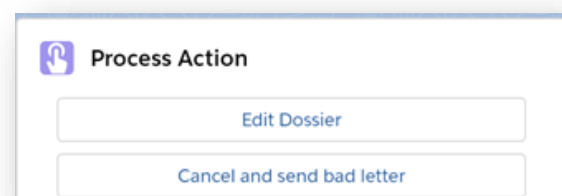
OPERATORS

Operators are Salesforce users that **interact with the application interface to manage customers' data**. They need to work in the most precise and efficient way possible because they handle customers data stored in the organization.



The screenshot shows a 'Phase History' table with columns: TYPE, ORIGIN, DESTINATION, and DATE. It contains three rows of data, all with a status of '(M)'. Above the table is a progress bar with four steps, the last of which is labeled 'DI010' and is currently active.

TYPE	ORIGIN	DESTINATION	DATE
(M)	IR030	DI010	19/06/2019 12.26
(M)	IR020	IR030	19/06/2019 12.24
(M)	IR010	IR020	19/06/2019 12.19



The screenshot shows a 'Process Action' dialog box with two buttons: 'Edit Dossier' and 'Cancel and send bad letter'.

Custom dynamic buttons drive operators' actions smoothly through the process lifecycle.

A good BPM software must provide help preventing incorrect executions of processes, assisting operators in their daily routing operations.

Thanks to ProcessClick front-end user interfaces, operators are guided through process steps in the most useful way possible. Behaviors and activities are streamlined and less error-prone, owing to dynamic buttons and contextual actions showed only when necessary based on the current state.

Because of this, **productivity is increased** with the reduction of errors along the process execution, resulting in **better business performance**.



SALESFORCE ADMINISTRATORS AND DEVELOPERS

Administrators and Developers are both engaged in **the administration of the platform**. Typical ProcessClick tasks include the installation of the app and the configuration via declarative tools.

No BPM previous knowledge is required. Powerful UIs show everything a Salesforce Admin needs for configuration: rules that govern process block or execution, transitions between process steps, automatic actions, and so on.

The screenshot shows the ProcessClick Phase Manager interface. The title bar indicates 'PROCESSCLICK Phase Manager - Case and Switch in EE'. Below the title bar, there are tabs for 'Home', 'Catalog', 'Compatibility', 'Phase Manager', 'Activities', 'Integration', and 'Migration'. The 'Phase Manager' tab is active. The main area displays a matrix for 'Case and Switch in EE'. The matrix has columns for various process steps (IR010, IR020, IR030, DI010, DI040, DI050, DI070, DI290, AL010, RI010, VC010, AQ020, BL010, SU010, RC010) and rows for different process types (IR010, IR020, IR030, DI010, DI040, DI050, DI070, DI290, AL010, RI010, VC010, AQ020, BL010, SU010, RC010). The matrix cells contain letters (A, M, 2A) indicating the configuration for each step. The interface also includes a 'Load' button and a 'History' tab.

Select Object Type	Case	Record Type	Switch in EE	Load	History	Clone	Flowchart	Paths
IR010 Created			M					
IR020 Awaiting Documentation	A		M					
IR030 Documentation Received		A		M				
DI010 Sent to Distributor				A				
DI040 Waiting distributor					A			
DI050 Distr. Nack/Correction						A		
DI070 Admissible/Awaiting Specs.							M	
DI290 Grace Period								A
AL010 SAP Entry								
RI010 Customer Cancellation				A				
VC010 Credit Check								
AQ020 Print Document				M				
BL010 Bad Letter							M	
SU010 Allocating User's Code								A
RC010 Closed								

The Phase Manager matrix is a compact and easy way to understand and configure processes at a glance.

Salesforce Developers work with Admins and cover the most technical ProcessClick functionalities. After steps configurations, they can also define **special technical criteria for the proper code execution**.

Developers can also plug-in ProcessClick capabilities via APIs using the native Apex language and the Force.com platform upon which ProcessClick is built. This makes it easy to implement flexible processes that reflect business requirements.

ProcessClick helps them saving the time needed for development tasks: **they can avoid repetitive coding tasks with a structured and maintainable approach**.

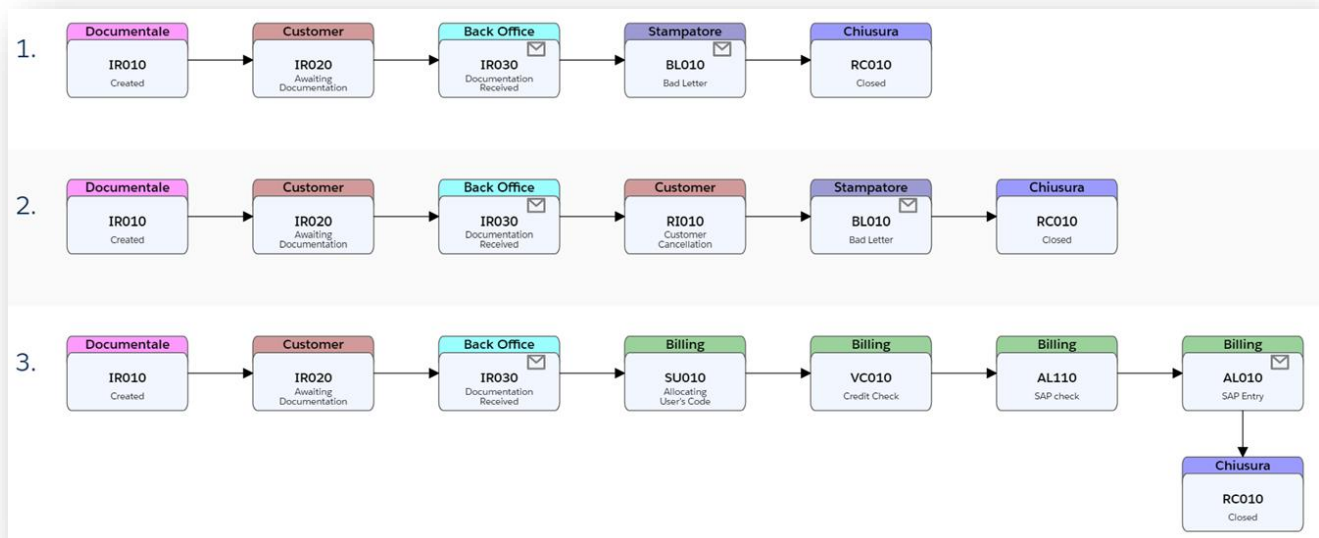
BUSINESS ANALYST

Analysts know processes inside-out. Because of this, they **map and design processes in the platform**, satisfying all business needs. ProcessClick declarative tools allow overseeing undergoing implementations, ensuring they follow the right design for each process.

Business analysts leverage and appreciate a well proven **analysis methodology, directly applicable into the product**. Capabilities and specific process moments ("phases") allow transition controls, conditions, and actions between stages. This is to better define and control processes, despite the



undergoing automation tool adopted. Visual tools describe processes and help in reporting and assessments, for example, flowcharts, possible execution paths and ready-to-use Reports & Dashboards.



Flowcharts are easy diagrams to read and understand, a good tool in the hand of business roles workers.

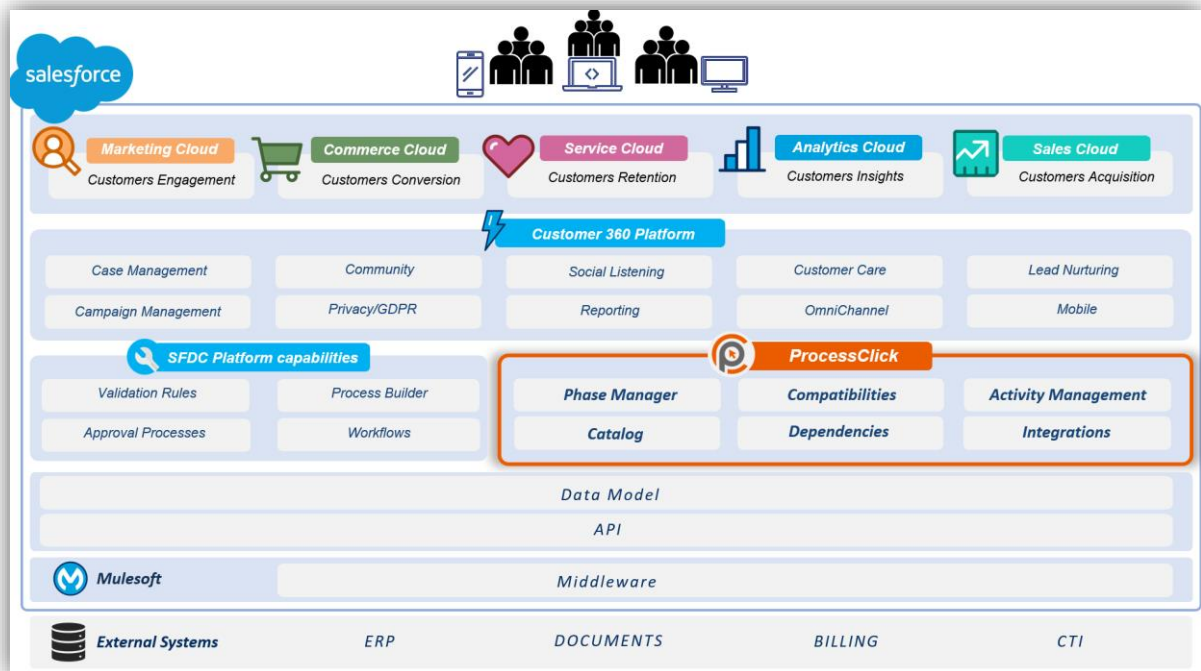
Thanks to this, it is also possible to make **business** departments communicating with **IT-teams** in useful ways, providing a **common ground wherein share data and information**.

ARCHITECT

React fast to **process changes with agility**: Architects can benefit from the **capability approach** in terms of **asset reusability and structured solutions**. If all processes are implemented with the same

solid pattern, this approach can save time and implementation resources, providing a more stable and standardized final solution.

From an architectural point-of-view, it is crucial to identify **key functionalities built to be reusable** across different processes and clouds. Then, scenarios can be satisfied by reusing existing, and well built, piece of configurable logics.



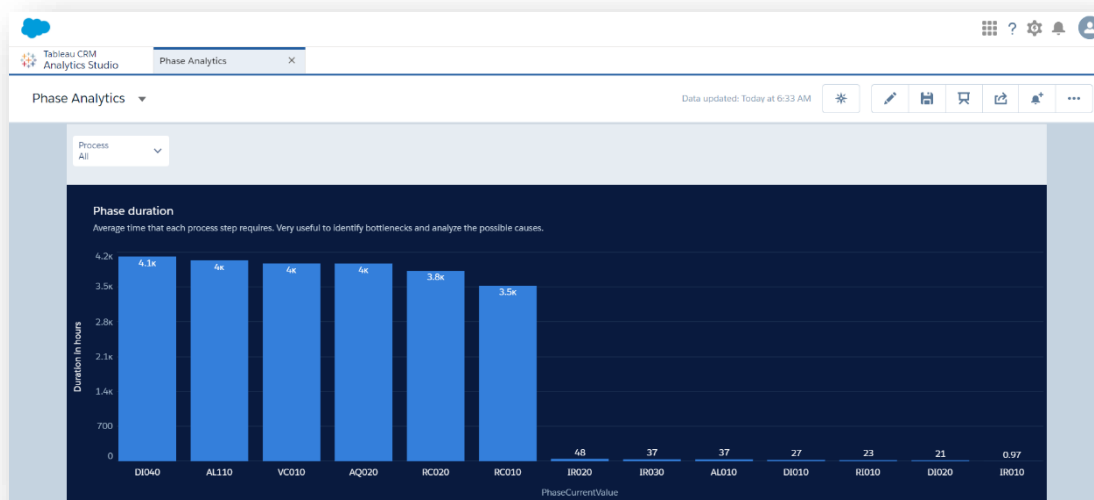
ProcessClick leverages Tableau CRM capabilities to provide analytics about how processes are running.

This will create a **solution as a stack of capabilities**, shared between departments, clouds and teams with the best governance possible.

C-LEVEL MANAGER

No more hidden or broken processes where nobody knows how, why, and where a process is running. **Audits and assessments are easier**, no matter what business complexity is involved in the project.

With the **ProcessClick Analytics add-on**, c-levels responsible for making decisions can take choices based on concrete KPIs that identify bottlenecks, inefficiencies in the implemented processes. Working faster and precisely wherever needed.



ProcessClick leverages Tableau CRM capabilities to provide analytics about how processes are running.



CONCLUSIONS

Cloud-native solutions like ProcessClick combine ease of use with outstanding process governance and definition.

Bring your employees together and leveraging the crowd across an entire organization around a BPM project, is what leads to truly sustainable outcomes, and builds a process culture within an organization.

This is easier than ever with ProcessClick.

CONTACTS

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