Cloud-Based Business Process Automation (BPA)

A Boardwalktech Whitepaper
Enterprise Software Today

Companies around the world continue to spend billions of dollars on enterprise software applications. More recently, these same companies are investing in cloud enterprise applications like Salesforce.com, Jive, and SuccessFactors. At the same time, business users continue to rely on desktop applications like Excel and email to support collaborative applications to “get the work done”. Why does this continue to happen despite the increasing investment in enterprise and cloud applications that are often designed to replace working “on the desktop?”

The answer is that traditional enterprise applications are unable to effectively support users’ needs along three major dimensions. The first is that these traditional applications don’t support the way that people want to work. They want to work off-line to perform what-if analysis to “think about” their data and then, when ready, they want to easily share their input and collaborate with other users. The second dimension is flexibility – users need their applications to be flexible so that they can rapidly respond to business changes without leaving the tool behind or having to rely on an over-worked IT Department to make changes. The third dimension is that information vitally important to a collaborative or planning process resides in many places within an enterprise. Using traditional enterprise applications, it is difficult to extract, cleanse, integrate and deliver this data to the user.

Traditional enterprise applications and their underlying data environments are designed and optimized to manage transactional “record-object” data and cannot effectively support a flexible business process automation environment which requires flexibility, integration, and collaboration. As a result, users continue to “get the work done” using applications like Excel or Google Docs to automate business processes - further
propagating the deep “disconnect” between the enterprise software investments and the desktop.

But the cloud solves this - right?
While using the cloud for certain enterprise applications continues to garner significant attention in the market, the “fit” falls off dramatically after a few standard applications like CRM. Cloud-delivery has worked well for these structured transactional data environments with accounts, contacts, and opportunities because the data model is really an evolution of the same “tabs” historically used in traditional ERP environments - like customers, orders, sales organization, and product master data. The problem is that every company has unique data/process requirements and customizing a build-once/sell-to-many cloud application does not work for enabling collaborative business process applications and solutions needed to fill the gap between enterprise and desktop.

Current offerings of content management and Business Process Management (BPM) systems also attempt to address the flexible, collaborative enterprise application users’ needs—but they fail. Since these systems work at the “file” or “process flow” level, the limitations of check-in/check-out and lack of data-level access control forces these solutions to rely on connecting with desktop data through file manipulation or XML. As a result, business users/IT staff are unable to fill the gaps in their enterprise stack using these technologies.

Boardwalktech Solution
Boardwalktech has developed the Boardwalk Collaboration Platform (BCP), a technology that bridges the gap between the desktop and enterprise software and directly addresses the needs of both IT and the business user while embracing the existing EPR/Systems of Record. BCP utilizes a patented positional data management technology to enable data sharing and collaboration connecting various desktop applications and the enterprise transactional systems of record. It is also designed in such a way that changes can be rapidly made to BCP-based applications without programming. In addition, users can collaborate using BCP-driven applications without the need for check-in/check-out and all changes are tracked and versioned. The result is improved business execution, reduced risk, high user adoption and fast implementations. BCP is the first Business Application Platform for the enterprise that fills the gap between transactional systems of record and the desktop.

BCP’s success in the market exemplifies a fundamental shift in the way mission critical business processes are automated and deployed within the enterprise. Our customers are filling this gap by using BCP to deliver solutions solving major enterprise process issues connecting their enterprise systems of record with the desktop whether it be Excel, Google Docs, Office WebApps, a standard browser, or any other tabular data environment.

Cloud Business Process Automation (BPA)

Most large companies are working with consulting firms and systems integrators to improve existing or create new business processes that run “in front of” or “outside of” their core systems of record. We routinely meet with companies that have 100s of “user defined processes” that have been built using desktop solutions that are unknown to their IT department but mission critical to the operation of their business. The elephant in the room is that these typically Excel-based processes have become “the mission critical application” because the customer realizes that their traditional software applications can’t deliver the functionality and flexibility required by their employees.

With BCP technology, customer-driven, cloud-based business process innovation and
automation can be enabled that is secure, enterprise hardened and fully scalable. In this way, BCP provides a new Platform-as-a-Service (PaaS) approach to delivering applications to the desktop that are integrated with enterprise software investments and meet the needs for critical process management.

**Getting started with Cloud BPA**

What makes sense today is an application environment that gives line-of-business (LOB) and IT users what they both want. A cloud-based business process automation platform as a service (PaaS) which still leverages the power, flexibility, and ubiquity of the desktop environment providing better alignment between technology and specific business needs.

- Leverage the BCP template library of “starter” applications to create new applications based on BCP; areas typically underserved by traditional software today include sales and operation planning (S&OP), trade partner collaboration, planning and forecasting, supply planning, and resource planning to name a few.
- Leverage BCP’s Developer’s Studio to rapidly create customized applications (often based on an existing process already in place) which can run in Excel, Google Docs, OpenOffice CALC, IBM Lotus Symphony, or HTML5.
- Provide a new offering around SharePoint for delivering cell-level collaboration as a value-add extension (well beyond “lists”) for critical, time-based Excel processes.
- Integrate spreadsheet data into the “big data” mix in a way not possible with other technologies.

Enterprises can leverage BCP to meet the current unmet need for managing and enabling mission critical processes currently run outside enterprise systems on the desktop. And because BCP is a platform and runs in the cloud, it can be used to automate any enterprise process reaching inside or outside the firewall.

**BCP Product Overview**

BCP was designed to support the unique collaboration needs of businesses today. It enables users to use positional data typically developed in Excel as the “application engine” combined with BCP’s unique database technology on the backend. BCP’s “positional database management system” manages ranges of tabular data (cells) as SQL objects in Microsoft SQL Server (or any RDBMS) where positionality is preserved and changes to the data are persistent and versioned. Boardwalktech was awarded a patent for this technology in 2008.

Unlike conventional collaboration approaches that work at the record-object or document level and use locking or check-in/check-out, BCP enables concurrent, multi-user collaboration from within a shared tabular range with all changes by all users and systems versioned at the cell-level in the database. With BCP, users can work off-line until ready to refresh updates or share data with others; and all data is shared on a “net change” basis at the cell level—including data from other systems. Users can see who made changes, what they changed, why they changed it, and compare it to any other change. Data, formula, and comments can all be shared with the ability to track scenarios, monitor exceptions, and make adjustments. And, BCP is UI agnostic—it can work within any application environment that utilizes positional (rows/columns) data.

BCP’s patented design includes a single schema architecture which supports flexibility and adaptability in a way that traditional applications cannot. BCP is uses a “top down” architecture in contrast to traditional enterprise application’s “bottom up”. Because the application model is defined and managed as a range of positional data, and the underlying layers are application independent, changes
originating in the UI or in the backend system can be easily made to the process without any programming. This flexibility is what enables companies to maintain the tight fit between the BCP-based applications and the dynamically changing needs of their operations.

Integration is also a key component of the BCP offering. A complete integration platform and tool kit is available offering a wide range of integration options from SQL to Web Services. Integration as part of the BCP cloud services provides customers the ability to get everyone on the same page seeing the same data at the same time for enhanced information exchange, collaboration and decision making.

Representative Customers
Multibillion-dollar companies including Coca-Cola, PricewaterhouseCoopers, ING Bank, Levi Strauss, Kraft Foods and VeriFone, have deployed BCP in areas including forecasting, demand planning, supply planning, resource planning, project management, FP&A, tax management, compliance, vendor managed inventory, S&OP, and trading partner collaboration.

These companies have all recognized that traditional centralized planning applications can’t meet their collaboration needs and that BCP provides an effective platform for meeting their challenges.

Case Study - Partner Collaboration
A multi-billion-dollar beverage company was consistently missing revenue and margin targets with one of their largest customers because of lack of process visibility. SAP and the manufacturer’s 20+ other applications could not effectively enable a collaborative environment for this key process. They created a spreadsheet-based process to collaborate with their customer on joint business planning around promotions, forecasting, revenue and margins. However, these spreadsheets did not provide the functionality and flexibility needed in order to enable real-time collaboration internally and with their customer. BCP enabled all the constituents to work concurrently on their joint business planning process and share updates between all users and systems. With BCP, the beverage company was able to increase margin by 6.2% while revenues increased 4.8% and moved their planning process from monthly to weekly. In addition, the company benefits from higher satisfaction and a closer alignment with its customer. The beverage company is currently in the process of deploying BCP for its other bottlers and for collaborating with its other major customers.

About Boardwalktech
Boardwalktech is the leading cloud based Business Process Automation Company. Our mission is to build and maintain competitive advantage for our clients by fostering business process innovation, automation and enhanced information exchange connecting the enterprise with the desktop.

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