MID

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DECISION GUIDE

Finding the Right BPM Tool

A guide for anyone who wants to introduce process management or replace their existing tool. With evaluation criteria, questions for vendors and the most common mistakes.

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Who This Guide is for

First-Time Introduction

You're starting out with process management and need quick acceptance.

Replacing a Tool

You want to switch tools and take all your existing models with you.

Certification Coming Up

You need audit-proof documentation and evidence for your next audit.

01 What Really Matters When Choosing

Most BPM projects don't fail because of the tool. They fail because nobody works with it.

Anyone choosing a process management tool usually compares feature lists. That seems obvious, yet it often leads in the wrong direction. The range of features rarely determines whether a project succeeds. What matters is whether the processes are actually used, maintained and further developed after the rollout.

That sounds trivial, but it has consequences for your selection. A tool that masters every conceivable notation but can only be operated by three people produces documentation that nobody reads. A tool that everyone understands but that has no release and version logic produces a collection that nobody trusts.

THE QUESTION BEHIND THE QUESTION

Instead of "Which tool can do the most?", it's worth asking a different question:

> **Which tool will your departments still be working with in two years, and not just the project team?**

Everything else follows from that.

Three Typical Starting Points

You're Getting Started with BPM

A low entry barrier, support with the setup and quick first results. In the beginning, methodological depth is less important than acceptance.

IN FOCUS

Acceptance

You're Replacing Your Current Tool

Migration capability, open formats, effort for transferring existing models. Check early whether your existing data can be exported.

IN FOCUS

Migration

Your Certification is Coming Up

Audit-proof versioning, release history, risks and controls at the process. This is where it's decided whether the audit becomes routine or a project.

IN FOCUS

Traceability

Continued on page 4: Key Criteria →

02 Six Criteria That Make the Difference

For each criterion, you'll learn what to look out for, how to spot a problem and which question to ask in the vendor meeting.

1. Usability
2. Lived Practice
3. Audit Readiness
4. Connections
5. Data & Access
6. Costs & Exit

Criterion 1 Can Everyone Work with it, or Only the Pros?

Process management is a team effort. If only trained modelers can capture content, a bottleneck forms: the knowledge sits in the departments, the tools are somewhere else. Good tools offer several ways to capture a process and still lead to a standard-compliant result.

	WHAT TO LOOK OUT FOR	WARNING SIGN
Capture	Several ways, from simple text to the full Modeler, all with the same result	Only one modeling editor, training required before first use
Reading	Processes can be understood without knowledge of the notation, e.g. via a guided view	Diagram is the only form of display

ASK THE VENDOR

Please show me how someone from a department without BPMN knowledge captures a process. Live, not as a prepared example.

Criterion 2 Does it Create Documentation or Lived Practice?

The biggest difference between tools shows after the rollout. Some are mere repositories: processes are described and then forgotten. Others involve everyone concerned, through suggestions from the departments, review and release steps, questions directly at the process and the option to actually run through a process.

ASK THE VENDOR

What happens in your tool when someone in a department notices that a process is no longer correct?

Continued on page 5: Key Criteria →

Criterion 3 Will Your Documentation Stand Up to an Audit?

When a certification is coming up, a nice process map is no longer enough. Evidence is required: Who released what and when, which version was valid when, which risks were assessed and controlled, and how?

	WHAT TO LOOK OUT FOR	WARNING SIGN
Versioning	Complete history with proof of release and validity periods	"Last modified" instead of real revisions
Risks	Assessment and controls directly at the process step, not in a separate list	Risks only as an attachment or free-text field

> **ASK THE VENDOR**
> How do I prove in an audit which process version was valid two years ago and who released it?

Criterion 4 Can You Also See the Connections?

Processes never stand alone. Which application is linked to which workflow? What happens when a system is replaced? These questions usually come up later than you think, and by then switching is expensive. So check during the selection whether architecture information can be linked with processes, even if you don't need it today.

> **ASK THE VENDOR**
> If we want to map our application landscape as well in two years: Can we do that in the same tool, or do we need a second one?

Criterion 5 Where is the Data and Who Can Access it?

Process documentation contains sensitive information: workflows, responsibilities, system landscape, sometimes even risks and vulnerabilities. Sooner or later, your IT department will ask where this data is stored and who can access it. Clarify this early, not after the decision has been made.

- Hosting location and whether the vendor discloses subcontractors
- Certifications of the vendor and the data center, not just self-declarations
- Data processing agreement available without having to ask for it
- Separation of customer data, encryption, deletion concept at the end of the contract

> **ASK THE VENDOR**
> What happens to our data if we cancel? And how do we get it out beforehand?

Continued on page 6: Key Criteria →

Criterion 6 What Does it Really Cost, and What Happens Afterwards?

The license price is only the visible part. On top of that come rollout, training, maintenance and the effort of making the tool known within the company. A low-cost tool without support ends up costing more than a pricier one with support.

	WHAT TO LOOK OUT FOR	WARNING SIGN
Prices	Publicly available, license model and minimum purchase clearly stated	"Price on request" without a ballpark figure
Support	Dedicated contact person, onboarding and trainings available	Support only via ticket system
Exit	Export in open formats possible at any time	Export only on request or for a fee

ASK THE VENDOR

What will the tool cost us in the third year, including everything we'll need by then?

TAKEAWAY

Six Questions for Your Vendor Meeting

Tick off what the vendor answered convincingly.

- [ ] 1 Please show me how someone from a department without BPMN knowledge captures a process. Live, not as a prepared example.
- [ ] 2 What happens in your tool when someone in a department notices that a process is no longer correct?
- [ ] 3 How do I prove in an audit which process version was valid two years ago and who released it?
- [ ] 4 If we want to map our application landscape as well in two years: Can we do that in the same tool, or do we need a second one?
- [ ] 5 What happens to our data if we cancel? And how do we get it out beforehand?
- [ ] 6 What will the tool cost us in the third year, including everything we'll need by then?

All 40 or so criteria in detail, with columns for three vendors

Criteria Checklist, page 9 →

Continued on page 7: Mistakes & Selection Process →

03 The Most Common Mistakes

Choosing the Tool Based on the Pros

The selection is often made by those who model themselves. Their requirements are legitimate, but not representative. Most users will only read processes.

Mistaking the Demo for Reality

In the demo, the vendor shows their best scenario with prepared data. It only becomes meaningful when you map one of your own processes.

Only Comparing Features

Every feature list looks impressive. What matters is how many of these features you'll actually use and how easy they are to access.

Underestimating the Maintenance Effort

The rollout is a project, maintenance is ongoing. Clarify beforehand who keeps the processes up to date and how much time that takes.

Checking Security Only at the End

If IT is only involved after the decision, the discussion starts all over again. Bring them in early, even if it lengthens the process.

Comparing Too Many Vendors

More than three or four candidates don't make the decision better, just longer. Narrow down early, based on a few must-have criteria.

04 How to Approach the Selection Process

1	**Sort Requirements**	Separate must-haves from nice-to-haves. Anything that isn't essential only delays the decision. Involve the future users, not just the project team.
2	**Scan the Market**	Three to four candidates are enough. Rule out vendors early that don't meet a must-have criterion, even if they are convincing otherwise.
3	**Test, Don't Just Watch**	Map a real, moderately complex process from your daily work. Let the people who will work with the tool later do this.
4	**Ask What's Missing**	Ask about what didn't work in the test. How a vendor handles an uncomfortable question says more than any reference list.
5	**Decide and Justify**	Record why you chose a tool. This helps later when someone questions the decision, and in the next evaluation.

TIMEFRAME

6 – 10

weeks

Allow six to ten weeks for a thorough selection, depending on how many people are involved. It can be quicker if the requirements are clear. It usually takes longer if the must-have criteria weren't defined early on.

Continued on page 8: Where Bpanda Excels and Where it Doesn't →

05 Where Bpanda Excels and Where it Doesn't

This guide is published by a vendor. So here is an honest look at what Bpanda is built for and what it isn't.

What Bpanda is Built for

- Process management that **the entire company** takes part in, not just one department
- **Three ways to capture processes**, from text to the full BPMN 2.0 Modeler
- **Processes that are run through**, not just read
- **Audit-proof documentation** for ISO 9001 and comparable standards
- **Processes and enterprise architecture** in one tool, no second system needed
- **SMEs**: starting from 10 licenses, dedicated contact person included

What Bpanda is Not Built for

- **Technical process automation:** Bpanda executes processes with people, not with systems. If you are only looking for a workflow engine, you need a different tool or have to put an engine on top of the processes in Bpanda.
- **Process mining:** We don't analyze system logs or reconstruct processes from them.
- **Operation in your own data center:** Bpanda is a SaaS product. We don't offer an on-premises installation.
- **Single-user use:** The minimum purchase is 10 licenses.

See for Yourself Instead of Taking Our Word for it

The most reliable part of any tool selection is your own test. You can try Bpanda free of charge for 30 days, with the full version and up to five people. Demo data is already set up, but you can also map your own process right away. Access ends automatically, no cancellation required.

30-DAY FREE TRIAL

Test Bpanda on Your Own Process

https://bpanda.com/free-trial →

Full version · Up to 5 people · No cancellation needed



Questions about the Selection?

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IN THE APPENDIX

Criteria Checklist to Fill Out

Around 40 criteria with columns for three vendors.

Continued on page 9: Criteria Checklist to Fill Out →

Appendix: Criteria Checklist to Fill Out

1. Weight
Mark how important each criterion is for you: **must-have**, **nice-to-have** or **not relevant**.

2. Rate
Enter how well each vendor meets the criterion, e.g. from **0 to 3 points**.

3. Decide
Add up the points for the **must-have criteria**. Any vendor that doesn't meet them is out.

Criterion	Important?	Vendor 1	Vendor 2	Vendor 3
Capturing and Modeling Processes				
Fully BPMN 2.0-compliant, not just BPMN-like				
Several capture methods for all skill levels				
Automatic validation against the notation				
Custom modeling guidelines can be stored				
Subprocesses and reuse of building blocks				
Import and export in BPMN format, switching possible at any time				
Use Across the Entire Company				
Usable without modeling knowledge				
Graphical entry via a process map				
Guided view that leads you through the process step by step				
Responsibilities and organizational structure can be mapped				
Multilingual support for international locations				
Accessible operation according to BITV and EN 301 549				
Collaboration and Maintenance				
Improvement suggestions from departments possible				
Structured review and release process				
Collaborative work on a draft				
Questions directly at the process, visible to everyone				
Notifications and tasks for participants				
Applying Processes in Everyday Work				
Processes can actually be run through, not just read				
Runs are documented and can be evaluated				
Processes can be shared, even beyond your own area				

Criterion	Important?	Vendor 1	Vendor 2	Vendor 3
Quality, Risk and Compliance				
Audit-proof versioning of every change				
Risks and controls can be stored directly at the process				
Validity periods and review reminders				
Evidence for ISO 9001 and other certifications				
Evaluations on the status of the process landscape				
Strategy and Architecture				
Applications and systems can be linked with processes				
Architecture management according to ArchiMate® in the same tool				
Evaluations across processes and architecture				
Corporate goals, capabilities and KPIs can be mapped and linked with processes				
Dashboards and reports for management and departments				
Level of digitalization and automation potential visible				
Impact of planned changes can be assessed in advance				
Operation, Security and Data Protection				
Web-based, no installation or server provisioning				
Hosting in Germany or the EU, GDPR-compliant				
Certifications of the vendor and the data center				
Data processing agreement and subcontractors transparent				
Single sign-on and user management via AD				
Open interface for connecting other systems				
Vendor, Costs and Support				
Transparent license model, prices publicly available				
Minimum purchase and contract term suit your company size				
Dedicated contact person instead of an anonymous ticket system				
Trainings and consulting available for the rollout				
Regular releases, transparent roadmap				
Free trial with full functionality				
Total points		0	0	0

Bpanda is a product of MID