

# Metastorm ProGuide Methodology

## Solution Overview

### Define Your Path

Metastorm ProGuide provides an integrated set of repeatable "best practice" process models that an organization can successfully employ when performing model-based business process improvement, requirements analysis and application implementation projects. This methodology tool helps project managers, business and system analysts, and developers define the "who, what, where, when, why and how" necessary for effective Business Process Analysis and automation projects.

### A Proven Approach

Developed as a direct result of Metastorm's extensive consulting experience using the principles of business process modeling, requirements modeling, information engineering, application design, component development, and system implementation, Metastorm ProGuide combines the best practices of leading business process improvement, analysis and design approaches with a comprehensive set of best practice models. These models, stored within the industry-leading Metastorm ProVision enterprise modeling solution, guide users through the complexities of Business Process Analysis, requirements modeling, gap analysis and distributed development.

In addition, Metastorm ProGuide improves the communication and cooperation between business and IT project participants. With this guidance, projects employing business process and requirements modeling approaches are more stable, predictable and repeatable. Following the techniques within Metastorm ProGuide enables users to create high-quality project deliverables.

And because the Metastorm ProGuide methodology is stored as a set of business models in Metastorm ProVision, users can refine and evolve the models to accommodate their own best practices. This means Metastorm ProGuide's content can be viewed, modified and published using the facilities of Metastorm ProVision. Advantages of this include a formal and rigorous definition of project structure and deliverables (the key components of a useful methodology) and the ability to review and update models as appropriate for the specific uses of an organization. Additional software need not be acquired. All Metastorm ProVision licensees can automatically view and publish the contents of a best practices notebook using Metastorm ProVision.

### Best Practices Notebooks

Metastorm ProGuide's best practices describe the different project structures, along with their activities and deliverables. In addition, a best practices techniques notebook describing detailed procedures for developing model-based deliverables is provided. Best practices notebooks include:

*Business Domain Profile* — The best practices for examining a portion of the business or business process at a high level. Its purpose is to scope the business domain, ensuring a consensus-based understanding of the objectives and scope for a project. This best practice also provides for partitioning the business domain into manageable process improvement and/or requirements analysis projects for subsequent

### Highlights

### Metastorm ProGuide Methodology

#### Benefits

- Provides an integrated set of repeatable "best practice" process models that an organization can successfully employ when performing model-based business process improvement, requirements analysis and application implementation projects.
- A proven approach developed as a direct result of extensive experience on hundreds of projects.
- Ensures that projects employing business process and requirements modeling approaches are more stable, predictable and repeatable.
- Improves the communication and cooperation between business and IT project participants.

#### Customer Successes

- Standard Pacific Corp
- NCB Insurance Company LLC
- AXA Equitable Life Insurance
- CareFirst BCBS
- NYS Dept of Labor
- BlueCross BlueShield of Florida
- Sprint-Nextel Corporation
- NRG Energy Inc

analysis. The results of the business domain profile effort are structured in the form of a profile document, which may replace (or serve as a starting point for) future profiling efforts.

*Business Process Improvement* — This is the best practice for modeling, analyzing and improving a business domain's business processes. The improvement is accomplished by modeling the current (as-is) state of the process and identifying potential improvements. These potential improvements serve as the basis for modeling a series of future (to-be) process alternatives. All of the alternatives are evaluated before proceeding with a single selected process design. Based on the impacts the new business process has on the organization, the best practice continues by defining the business requirements that support the new business process, and identifying alternate solutions for implementing the business requirements.

*Requirements Analysis* — The Requirements Analysis notebook contains the best practices process for applying a model-based approach for defining business and system requirements. This best practice also employs special meeting facilitation techniques and a workshop environment to develop these requirements. Metastorm's seasoned consultants work with business and IT teams to establish consensus on how the business processes should work, which business processes are best served through automation, and how technology will support those business processes. The resulting model-based deliverables provide a reliable basis for designing a new solution, performing package selection and/or configuration, and updating existing applications.

*Distributed Design* — Distributed Design includes the best practices that focus on the specification of an application system. Its purpose is to take the requirements defined in a requirements analysis exercise and create technical specifications for a distributed, heterogeneous environment. The Distributed Design process addresses the design of distributed applications using a broad definition of client/server. Technically, a client is a software application or node that requests services from another software application or node (known as the server). A server is a software application or node that provides a service to a requestor (client) when initiated by the requestor. In a distributed environment any node may serve in the role of client and/or server. Using this definition of client/server, the distributed design project template may be used when implementing almost any application system in a distributed environment. Therefore, this template addresses not only the "narrow" definition of client/server environments (data on a central server and presentation on a local workstation), but also all environments that call for distributed system components (such as cooperative processing, distributed processing, cooperative server, etc.).

*Packaged Software Implementation* — This notebook delivers the best practices for identifying, evaluating, configuring and implementing a commercial software package. This project template utilizes business and technical requirements from a requirements analysis to determine the acquisition criteria of a software package. The criteria are used to create a Request for Proposal (RFP), which is sent to potential vendors. Vendor responses are evaluated on the capabilities of the software package, as well as the vendor's ability to support the requirements. The recommended software package is analyzed to determine the extent of modifications necessary and the cost of implementation. Once acquired, configuration changes are determined and implemented in the software package.

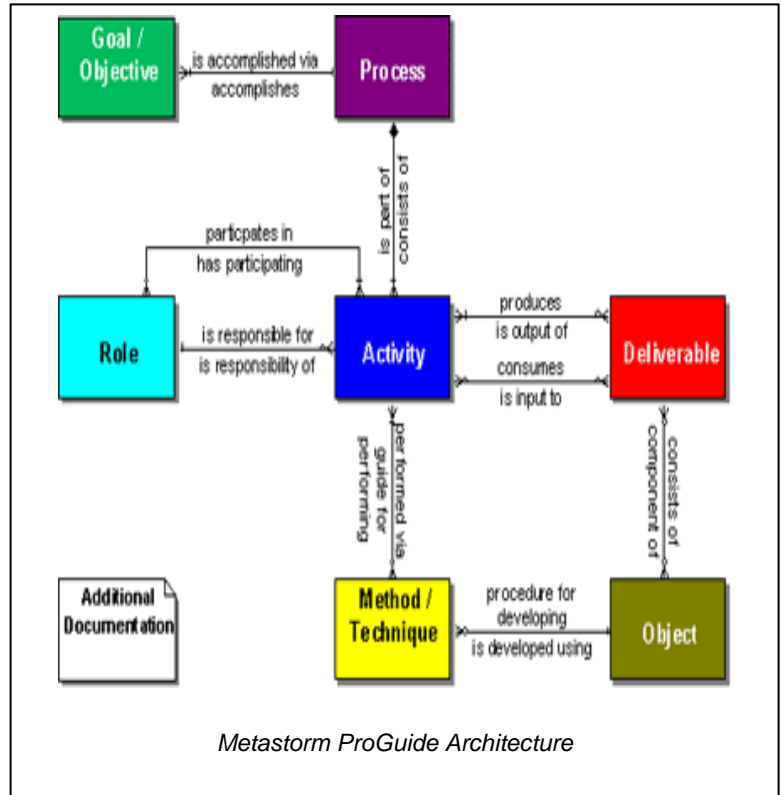
*System Development and Implementation* — With the System Development and Implementation notebook, users receive the best practices process for constructing and installing an application system. The source of the application system design may be an enhancement to previously purchased packaged software, or a newly developed set of system specifications resulting from a distributed design effort. In this project plan the system specifications (or package enhancements) are constructed and tested. The resulting application system is then installed in each of the locations where it is to be implemented.

*Techniques* — The Techniques notebook contains detailed analysis techniques for business and system analysts, supporting the development of key deliverables defined by the Metastorm ProGuide Best Practices.

## Architecture and Models

*Metastorm ProGuide Architecture* — The Metastorm ProGuide architecture is expressed in a simplified meta model, illustrated to the right. The meta model shows the basic objects of interest and their associations to other objects in ProGuide.

*Metastorm ProGuide Models* — ProGuide Process and Technique models are stored in Metastorm ProVision. The sophistication, integration, and ease-of-use of Metastorm ProVision empowers organizations to customize the Metastorm ProGuide models, best practices processes and techniques.



## About Metastorm Inc.

With a focus on increasing enterprise visibility and optimizing business results, Metastorm offers market-leading solutions for Enterprise Architecture (EA), Business Process Analysis & Modeling (BPA) and Business Process Management (BPM). Combined, these solutions form the Metastorm Enterprise and allow organizations to close the gaps between strategy, planning and execution to optimize business performance. Metastorm is the only organization to bring together these three critical disciplines, and it has generated successful results for organizations worldwide in manufacturing, retail, financial services, business services, healthcare, telecommunications, and government. For more information on the value of Metastorm Enterprise for powering strategic advantage, visit [www.metastorm.com](http://www.metastorm.com).

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