Business Process Modeling

14 PMI PDUs | 14 IIBA CDUs

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Instructor

Format: Live Instructor-Led Online through Zoom
Dates: October 19 - 21, 2026
Time: 12:00 PM - 4:30 PM EDT
Price: $650 per person

To register:
Email Chris Remmert cremmert@nysforum.org and indicate the course title in the subject line.

Technology and Attendance Requirements:
Computer with a browser, Zoom, a microphone and speaker. For this workshop, camera should be on if possible and you must be actively participating.

Business Process Modeling is a hands-on course for professionals who need to understand, analyze, and improve how work actually gets done in organizations. Rather than treating process modeling as a notational exercise or a compliance activity, the course positions process models as thinking tools—used to surface assumptions, reveal coordination problems, and support better decisions.

You will work through a realistic, shared case study and learn how to identify stakeholders, define and scope processes, document current-state behavior, and use process maps to assess problems and recommend improvements. Modeling is taught using a small, practical subset of BPMN focused on clarity and communication rather than completeness or tool-specific correctness. The emphasis is on understanding flow, decisions, handoffs, and parallel work—not on mastering every symbol.

Throughout the course, you will practice turning messy real-world situations into understandable models, then using those models to reason about delays, rework, risk, and missed outcomes. Improvement ideas are grounded in what the models reveal, not in applying predefined techniques or frameworks by rote. Where helpful, concepts familiar to software and IT professionals—such as user stories and acceptance criteria—are used to translate process insights into actionable change.

By the end of the course, you will understand how to use process models to improve shared understanding, guide discussion, and support realistic improvement efforts—without requiring specialized BPM tools or advanced certification-level knowledge. The course is designed for business analysts, product owners, process practitioners, and software professionals who need practical process skills they can apply immediately.

Certification

This course will contribute 14 PMI® professional development units (PDUs) towards your chosen certification (12 Ways of Working and 2 Business Acumen).

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Certification

This course will contribute 14 continuing development units (CDUs) or professional development hours towards certifications from the IIBA®.

A Business Process Modelling digital badge will be available upon successful completion of the course from SoftEd

Learning Outcomes

1. How to recognize and define business processes based on outcomes, not org charts or policies.
2. How to identify stakeholders and understand competing perspectives within a process.
3. How to read and create clear process maps using a small, practical subset of BPMN.
4. How to model decisions, exceptions, and parallel work without overcomplicating diagrams.
5. How to determine the right level of detail for a given audience or purpose.
6. How to use process maps to identify bottlenecks, delays, rework, and coordination problems.
7. How to define process boundaries and avoid uncontrolled scope expansion.
8. How to translate process issues into clear improvement opportunities.
9. How to express improvements in outcome-focused terms, including simple user stories and acceptance criteria.
10. How to think about process improvement as an ongoing capability rather than a one-time project.

Prerequisites

To get the most out of this course, it is recommended that participants have foundational knowledge of business analysis through formal training like our Business Analysis Essentials course or have relevant experience working in a business analysis context.

Great for:

- This course is designed for professionals who work with business processes as part of their day-to-day responsibilities and want practical ways to understand, analyze, and improve how work actually gets done.
- It is especially well suited for:
- Business analysts and product owners
- Software and IT professionals working in agile or hybrid environments
- Process analysts and continuous improvement practitioners
- Managers and team leads responsible for improving how work flows across roles or teams

Participants are expected to bring real-world experience with organizational processes, but no prior BPMN training or specialized modeling tools are required. The course focuses on developing judgment, clarity, and practical modeling skills that can be applied immediately in a wide range of organizational contexts.

The emphasis is on using process models as thinking and communication tools rather than as formal specifications. Learners seeking advanced BPMN certification, executable workflow design, or enterprise-level process architecture may find this course most valuable as a foundation rather than as a specialization.

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Content:

Module 1 – Why Business Process Improvement

This module establishes what business processes are, why organizations care about them, and why process improvement is often triggered by frustration rather than strategy. Instead of starting with formal definitions or methodologies, the module grounds process improvement in everyday experience: delays, rework, unclear responsibilities, and outcomes that consistently fall short of expectations.

You will explore how processes cut across roles, teams, and systems, and why improving a process is rarely the same as optimizing a single activity. The module also introduces an important mindset for the rest of the course: process models are not documentation artifacts created for compliance, but thinking tools used to make work visible and discussable.

Objectives

- Explain what a business process is and why it matters
- Identify common triggers for process improvement
- Connect process problems to unmet outcomes
- Distinguish symptoms from underlying process issues

Exercise

You will identify a real process problem and describe why it causes frustration or inefficiency.

Going beyond (explicitly out of scope)

- Formal improvement methodologies (Lean, Six Sigma, DMAIC)
- Organization-wide transformation programs
- Certification-oriented process improvement models

Module 2 – Stakeholder Identification

Processes exist to serve people, yet many process problems arise because stakeholder perspectives are misunderstood, incomplete, or ignored. In this module, you focus on identifying who participates in a process, who depends on its outcomes, and who is affected by its failures.

Rather than relying on predefined stakeholder categories or templates, you work from real situations and goals. You explore how different stakeholders experience the same process differently, and how conflicts between goals often drive complexity.

Objectives

- Identify stakeholders versus actors
- Describe stakeholder goals and concerns
- Recognize conflicting stakeholder needs
- Express goals in simple, outcome-focused language

Exercise

You will identify stakeholders and actors and write 1–2 simple statements of what each wants from the process.

Going beyond

- Formal stakeholder maps and matrices
- RACI or responsibility modeling
- Detailed persona development

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Module 3 – BPMN 1: Single-Thread Process Models

This module introduces process modeling using a deliberately small subset of BPMN notation. The focus is not on learning a standard for its own sake, but on using simple visual structure to tell a clear story about how work flows from start to finish.

You learn to model processes that include decisions but no parallel work, using swimlanes, activities, flows, events, and gateways. The emphasis is on readability, narrative flow, and shared understanding.

Objectives

- Use swimlanes, activities, flows, events, and decision gateways
- Read a process model as a story
- Model decisions without parallel work
- Apply “good enough” modeling standards

Exercise

You will create a single-thread process model that clearly tells the story of how work is done.

Going beyond

- Full BPMN symbol set
- Formal event types and semantics
- Executable or tool-enforced BPMN

Module 4 – BPMN 2: Concurrency and Intersections

Many real processes involve work happening in parallel and points where multiple processes intersect. This module extends basic modeling to include concurrency and shared activities, while maintaining the same restraint around notation. You explore how parallel paths introduce coordination challenges, risk, and delay, and why intersection points—such as approvals or shared data updates—often become bottlenecks. Rather than treating concurrency as an advanced technical topic, it is presented as a practical reality that must be made visible to understand why processes behave the way they do.

Objectives

- Identify when work happens in parallel
- Model simple concurrency
- Recognize shared decision or approval points
- Understand how intersections affect outcomes

Exercise

You will extend a model to include parallel paths and shared intersections with other processes.

Going beyond

- BPMN choreography diagrams
- Conversation diagrams
- Formal synchronization patterns used for automation

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Module 5 – Developing the Process Inventory (What Is a Process)

This module steps back from diagramming to clarify what qualifies as a process in the first place. You explore the difference between processes, activities, tasks, and functions, and why organizations often struggle to agree on what their processes actually are.

Rather than starting with formal inventories or architectures, you identify processes informally by focusing on outcomes and goals. Only after that work is done are formal terms such as “process inventory” introduced as convenient labels for thinking you have already done.

Objectives

- Define a process by inputs, outputs, and value
- Distinguish processes from activities and tasks
- Identify candidate processes at different levels
- Understand why inventories exist

Exercise

You will list candidate processes and describe the outcome each one delivers.

Going beyond

- Enterprise process architecture frameworks
- Guiding/core/supporting taxonomies
- Formal business capability modeling

Module 6 – Evaluating and Prioritizing Processes

Not every process deserves attention at the same time. This module focuses on making realistic prioritization decisions using simple, transparent criteria rather than complex scoring models.

You examine how impact, frequency, pain, and feasibility influence which processes are worth improving now versus later. The module highlights how prioritization is always imperfect and why waiting for perfect data often results in no action at all.

Objectives

- Explain why prioritization is necessary
- Compare processes using basic criteria
- Relate process pain to stakeholder impact
- Accept prioritization without perfect data

Exercise

You will select one priority process and explain why it matters most right now.

Going beyond

- Weighted scoring models
- Portfolio-level governance
- ROI or benefits-realization frameworks

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Module 7 – Establishing Scope

Many process initiatives fail because scope is unclear or expands uncontrollably. This module focuses on defining what a process improvement effort will and will not address.

You learn how to identify meaningful boundaries, recognize scope creep as it happens, and use scope decisions to keep analysis focused. The module emphasizes that scope is not about ignoring reality, but about choosing a manageable and defensible point of view.

Objectives

- Define in-scope and out-of-scope elements
- Identify upstream and downstream boundaries
- Recognize scope creep as it happens
- Align scope to achievable outcomes

Exercise

You will define the scope of your selected process and explicitly state what is excluded.

Going beyond

- Formal scope canvases or charters
- Program-level dependency management
- Contractual or regulatory scoping models

Module 8 – Drawing Process Maps

Now we'll apply the BPMN techniques we learned earlier. This module brings together stakeholder understanding, scope decisions, and modeling concepts to document a real current-state process. The emphasis is on capturing how work actually happens, not how it is supposed to happen according to policy or documentation.

You practice choosing an appropriate level of detail, validating models with stakeholder experience, and resisting the urge to overcomplicate diagrams with every possible exception or intersecting process.

Objectives

- Translate a real process into a clear map
- Apply BPMN concepts appropriately
- Choose an audience-appropriate level of detail
- Validate the model against reality

Exercise

You will create a current-state process map and confirm it reflects how work actually happens.

Going beyond

- Multi-view model repositories
- Tool-specific modeling standards
- Maintaining models as system-of-record artifacts

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Module 9 – Assessing the Current State with Process Maps

Once a process is visible, it can be analyzed. This module uses process maps as diagnostic tools to identify delays, rework, risk, and confusion.
You learn to look beyond the “happy path” and examine where decisions are unclear, where work waits unnecessarily, and where responsibilities are ambiguous. Acceptance criteria are introduced informally as a way to make expectations explicit and assess whether the current process actually meets them.

Objectives

- Identify bottlenecks and handoffs
- Surface hidden decisions and exceptions
- Translate issues into unmet conditions
- Separate symptoms from causes

Exercise

You will annotate your process map to highlight problems and describe how you know they are problems.

Going beyond

- Theory of Constraints as a formal method
- Statistical process analysis
- Formal value stream mapping

Module 10 – Recommending Improvements

This module focuses on turning analysis into improvement ideas that are realistic and defensible. Rather than teaching a catalog of techniques, it emphasizes grounding recommendations in what the process model actually reveals.
You learn to frame improvements in terms of outcomes and trade-offs, often expressing them as simple user stories with clear acceptance criteria. This helps connect process thinking to environments familiar to software and IT professionals.

Objectives

- Generate improvement ideas from observed issues
- Relate improvements to stakeholder goals
- Express improvements as simple user stories
- Define clear acceptance criteria

Exercise

You will propose one improvement and describe how success would be recognized.

Going beyond

- Prescriptive improvement frameworks
- Large-scale redesign initiatives
- Tool-driven solution selection

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Module 11 – Implementing and Testing Improvements

Good ideas fail if they cannot be implemented. This module explores what it takes to put process changes into practice, including testing, communication, and adoption.
You examine how acceptance criteria support validation, why testing process changes matters, and how implementation often reveals assumptions that were invisible during analysis.
The module also addresses the reality that many participants influence change without owning it.

Objectives

- Explain why testing process changes matters
- Use acceptance criteria to validate changes
- Identify implementation risks
- Recognize adoption and communication needs

Exercise

You will outline a simple approach for implementing and validating an improvement.

Going beyond

- Formal change management models
- Detailed training program design
- Governance and control frameworks

Module 12 – Driving Continuous Improvement

The final module reframes process improvement as an ongoing capability rather than a one-time project. You explore how processes drift over time, how signals for re-evaluation emerge, and how "good enough" is often a valid outcome.
The module emphasizes reflection, learning, and knowing when to stop improving. It also addresses the limits of influence and ownership that most practitioners face.

Objectives

- Explain why improvement is iterative
- Identify signals that trigger re-evaluation
- Use feedback to guide next steps
- Understand personal and organizational limits

Exercise

You will identify one outcome to monitor over time and describe when it should prompt review.

Going beyond

- Formal continuous improvement cycles (DMAIC, PDCA)
- Enterprise performance management systems
- Organization-wide maturity models

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AI Enhancement

Generative AI can be used to enhance each of the exercises.

Module 1

Generative AI is introduced lightly as a way to help overcome the “blank page” problem, helping to reveal common process issues and patterns while reinforcing that identifying what actually matters remains a human responsibility.

Module 2

Generative AI is used as a brainstorming aid to surface possible stakeholders and concerns quickly, reducing startup friction. The emphasis, however, is on evaluating and refining that output—deciding which perspectives are relevant, which are out of scope, and where AI-generated assumptions need correction.

Module 3

AI can assist by generating draft process descriptions or initial diagrams, but the real learning happens in reviewing those drafts: identifying unclear scope, missing decisions, or unnecessary detail. This reinforces the idea that models are judged by usefulness, not by completeness.

Module 4

AI can help surface likely parallel paths or intersection points, but it cannot decide which processes should be modeled together. This module reinforces the importance of maintaining a clear point of view and avoiding the single-model fallacy.

Module 5

AI can help generate candidate process lists based on roles or goals, but the emphasis remains on judgment: deciding which processes are meaningful, which are redundant, and which are simply different views of the same work.

Module 6

AI can assist by suggesting prioritization dimensions or highlighting common risk areas, but final decisions remain human. This reinforces the idea that prioritization is a choice, not a calculation.

Module 7

AI can help surface upstream and downstream considerations, but it cannot decide what belongs in the current effort. This module makes scope an explicit design decision rather than an afterthought.

Module 8

AI can assist by drafting initial models or narratives, but those drafts often reveal the very problems the course addresses: unclear goals, overloaded scope, or blended processes. Reviewing and correcting those drafts becomes a learning tool.

Module 9

AI can help suggest common problem patterns, but insight comes from connecting those patterns to the specific context and constraints shown in the model.

Module 10

AI can generate improvement ideas quickly, but the work lies in evaluating feasibility, side effects, and organizational constraints.

Module 11

AI can assist with drafting plans or test scenarios, but responsibility for realism and accountability remains human.

Module 12

AI is positioned as a potential support for monitoring and reflection, not as an automated improvement engine.