

CAM-I PBM Program
PBM Implementation Roadmap
Executive Summary

What

Process Based Management is a holistic management approach. It focuses an organization on customer expectations, end-to-end processes, integrating initiatives, process-related measurement and rewards, and employee mindset. Fully implementing the structures and systems required to optimize PBM requires significant commitment from employees at all levels, sustained through a period of many years.

Implementation challenges are significant, and include how to start a PBM journey, how to build and maintain momentum, how to develop the infrastructure and culture required, and how to continually achieve successes. The Implementation Roadmap addresses these challenges. It is a detailed guide for how to instill PBM as the management philosophy of an organization. The Roadmap does not address the question “Why?” It answers the question “How?”

The Roadmap is not a maturity model. It is a guide to determine the steps an organization should take to implement Process Based Management.

Who

The Roadmap can be used by all organizations - those with few process efforts and a single passionate advocate, those managed by a Process Council and driven by the results of integrated processes viewed in context of their entire supply chain, and those at any point in between. It works for large multinationals and organizations of a few individuals; for well-established firms and for startups; and for-profit, nonprofit and government entities alike. Finally, it works for those who envision achieving the fullest possible deployment of PBM, and for those who desire to move only a few additional steps forward.

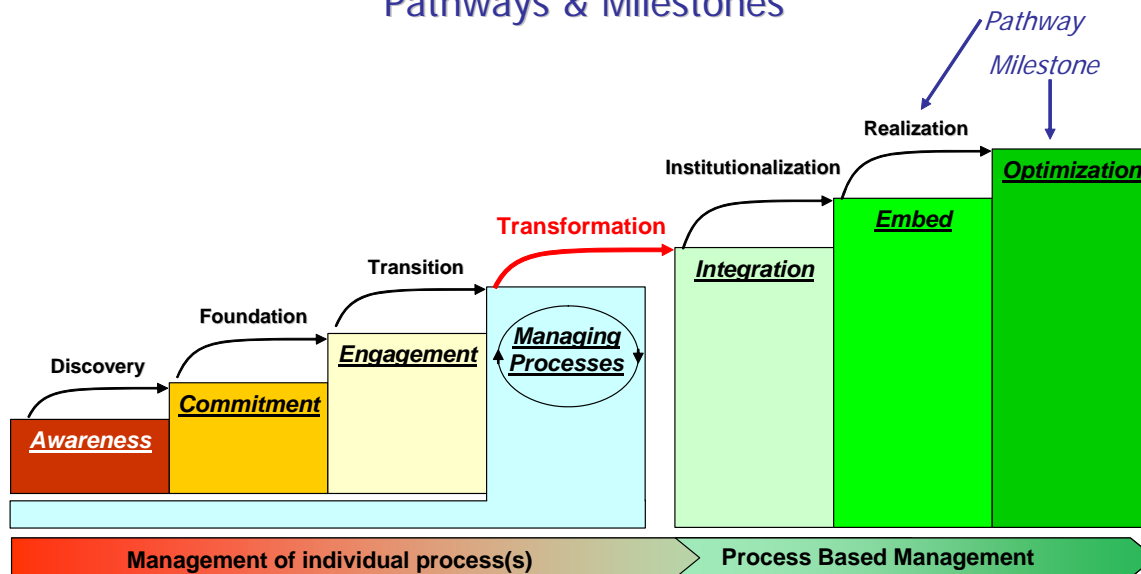
An organization’s strategy, and the degree to which PBM supports accomplishing its strategic objectives, suggest the extent to which PBM should be implemented. Organizations may choose to venture only a portion of the PBM journey, or follow only the first two, three or four pathways. This is entirely appropriate, and the Roadmap’s structure supports doing so.

How

An organization can begin using the Roadmap at any stage on their PBM journey, or at any stage of process maturity. Using the Roadmap begins with completing the PBM Assessment. The assessment identifies the extent to which PBM is deployed, assesses the level of performance on process-related elements, and establishes a baseline. The organization then “enters” the Roadmap at a point based on the assessment results. In short, the Assessment identifies gaps, and the Roadmap closes the gaps.

As shown below, the Roadmap is organized around seven Milestones and the six Pathways connecting them. The Milestones represent the major levels of PBM deployment. The Pathways contain the series of detailed Steps an organization follows to advance to the next Milestone. Each Step provides the what, why, who and how of the actions prescribed, as well as the tools used and outputs generated.

Roadmap to PBM Pathways & Milestones



The Roadmap is largely prescriptive, but it is flexible. Most tasks are recommended as required components of a successful PBM journey. It is presented in a linear fashion, but following the Roadmap is not a purely linear process. First, some Steps may not be necessary or suitable for a specific organization. Second, while many tasks have required predecessor tasks, many tasks can or must be performed in parallel. Third, some tasks can successfully be performed in other than the sequence presented.

The Roadmap designers believe it prescribes the most comprehensive, detailed and optimum order of Steps an organization should take on its PBM implementation journey. Ultimately, an organization's leadership will review, select and fund only those Steps to which they are committed. Any deviation or omission from the prescribed path should be carefully and purposefully considered, particularly with regard to the risks generated by doing such.

This first version of the Roadmap was created by individuals with over 100 years of combined process-related experience. It was created through a process of collaborative research, development and validation. Validation consisted of studying the efforts of companies who have and are currently successfully progressing on their PBM journey. Validation will continue. The content will be updated as needed to reflect what is learned from organizations who use it.

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