



## OVERVIEW

June 30, 2009

For additional product details organized by  
job function, area of expertise, or complementary technology,  
please see <http://www.agilepoint.com>

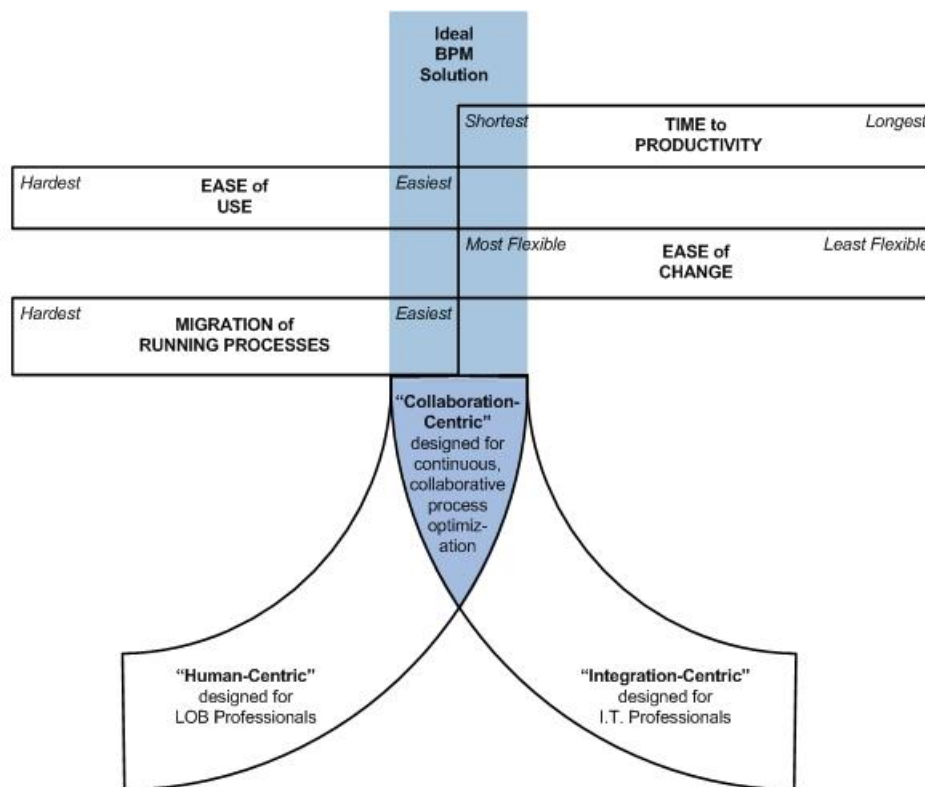
## EXECUTIVE SUMMARY

All businesses have processes. Most businesses realize that optimizing those processes will yield substantial benefits, such as:

- Improving customer satisfaction
- Improving employee job satisfaction
- Reducing costs
- Increasing revenues
- Gaining competitive advantage

However, many businesses feel that *continuous process optimization* is not feasible. Prior attempts at process automation and optimization may have been inhibited by resource bottlenecks, communication breakdown, a lack of collaboration or an incorrect division of labor.

AgilePoint recognizes that business process excellence requires business process management (BPM) solutions that are not only technically elegant, but also extremely sophisticated in their support of real-world organizational needs and accommodation of inter-disciplinary dynamics. A modern BPM solution cannot serve Line of Business (LOB) specialists to the exclusion of Information Technology (I.T.) professionals, or *vice versa*. AgilePoint has been carefully and explicitly crafted to provide the ultimate platform for continuous end-to-end collaboration—not only between “business” and I.T., but also between disciplines and across functional boundaries.



The diagram to the left outlines the key characteristics of a BPM solution ideally suited to support continuous process optimization, with the light blue region indicating the desired state. This paper will outline how AgilePoint aligns with these goals, and what benefits AgilePoint's unique characteristics can provide for your organization.

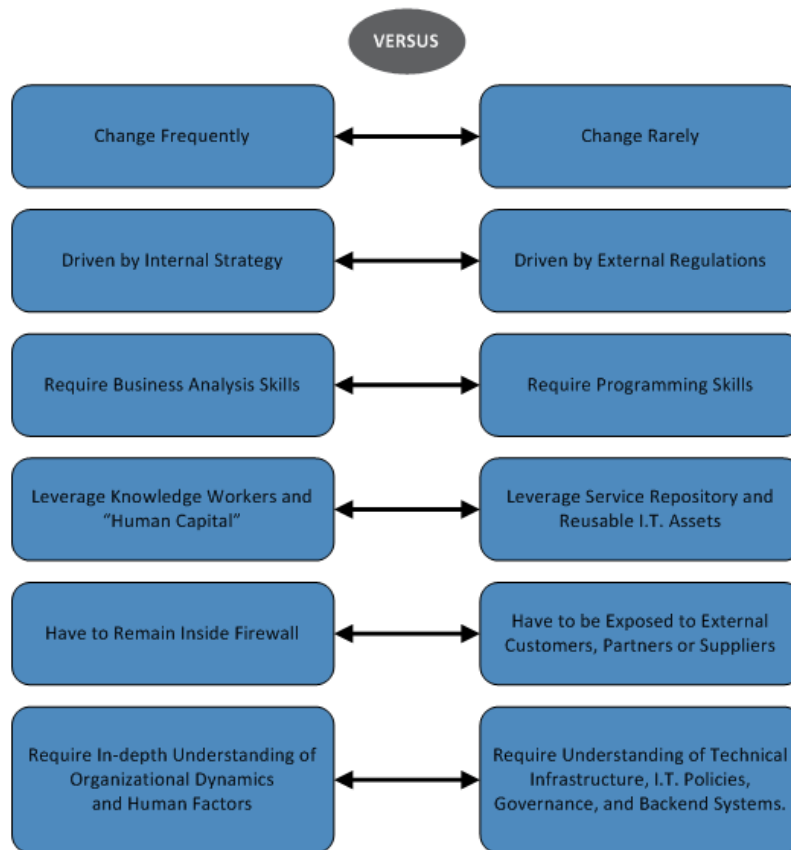
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## SUPPORTING EFFECTIVE WORK PATTERNS

### REAL-WORLD COMPLEXITY

When automating the processes inside an organization, there are contrasting requirements that typically appear. There are portions of your process that:



Within a single business process, these contrasting conditions frequently coexist. Business Process Management (BPM) solutions should support an increasingly-complex world, and provide the sophisticated and complete set of capabilities needed in an ever-more-competitive landscape. However, most BPM offerings are either:

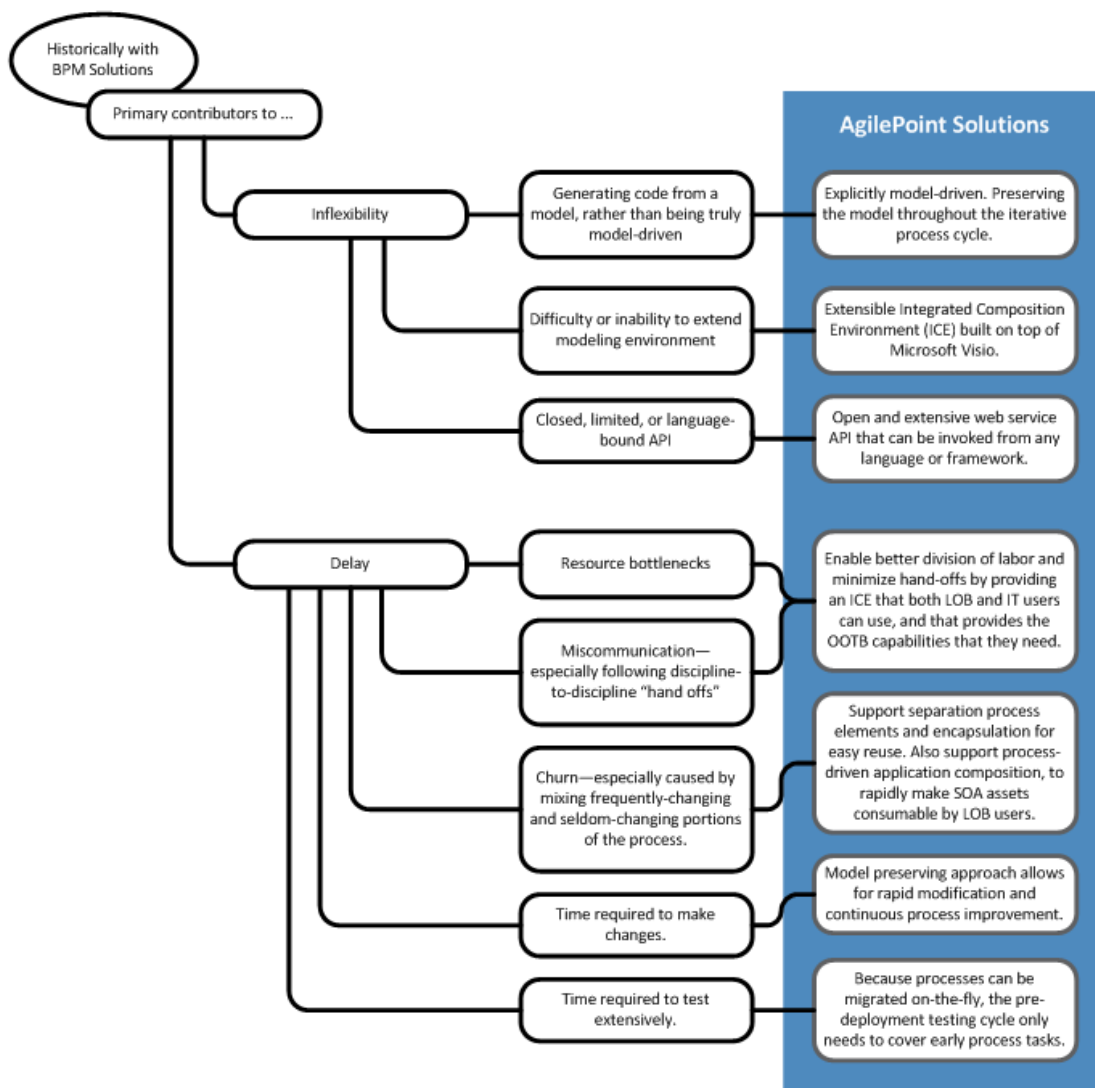
- Geared exclusively at Line of Business (LOB) users—claiming “no coding required” and providing easier-to-use modeling tools.
- Targeted solely at I.T.—providing better system integration and extensibility.

In order to achieve greater organizational agility, foster collaboration, optimize resource utilization, and decrease churn, it is important that a BPM solution simultaneously serve LOB and I.T. personnel.

## THE WAY WE NEED TO WORK

When discussing BPM’s evolving role, Forrester’s Ken Vollmer recently stated that “The current high level of economic pressure is resulting in situations where enterprises face stronger demands to increase their ability to respond to new challenges with flexible solutions created with a little or no delay.”<sup>1</sup>

At Ascentn, we are completely committed to providing the best tools to deliver processes with speed and flexibility. In order to accomplish these goals we have carefully examined the conditions that have historically contributed to inflexibility and delay.



<sup>1</sup> Forrester, Topic Overview: How BPM Can Help The Bottom Line In Difficult Financial Times, Vollmer, Leganza and Czarnecki, March 17, 2009

Addressing factors that impact flexibility and timely delivery head on, is critical to AgilePoint's success in supporting business agility and continuous collaboration.

- AgilePoint allows LOB personnel, knowledge workers and power users to create and manage business processes that contain only the process elements that they understand, and ask the technical staff to develop the pieces that they do not understand.
- AgilePoint allows technical personnel to package up functionality that LOB personnel, business analysts, knowledge workers and power users can easily understand and simply “plug in” to their business processes.
- AgilePoint's open framework allows different business units to consume each other's processes, keeping the process definition and upkeep in the unit that best understands the underlying business rationale.
- AgilePoint's modeling environment is built on top of Microsoft Visio—a tool that is already familiar to business analysts, project managers, I.T. staff, and many other employees throughout the organization.
- AgilePoint's elegant design provides an unprecedented level of support for handling unexpected process changes. Knowledge workers can be empowered to change routing, reassign tasks, or make other unforeseen changes. If the entire process needs to change, AgilePoint supports quickly moving some or all of the in-progress work to the new process definition. These capabilities are often characterized as “Dynamic BPM” and are critical for Case Management and Human Interaction Management use cases.

## AGILITY WITH PURPOSE

We don't lose sight of the core goal of business agility—optimizing the ratio between effort expended and value realized. We believe that supporting cross-functional and multi-disciplinary involvement in business process management is critical to achieving true Business Agility. Our experience has proven that:

1. One of the easiest ways to reduce miscommunication, *is to reduce the number of things that need to be communicated*. AgilePoint empowers the people who have the knowledge to do the work themselves.
2. One of the best ways to promote process collaboration, *is to provide a central common platform for creation and refinement*. With AgilePoint, the model is in Visio. More employees understand it. More employees across multiple disciplines are able to contribute.
3. One of the best ways to avoid churn and keep from “stepping on each other's toes” *is to have clearly defined boundaries across which we have a customer-and-service-provider relationship*. AgilePoint allows one group to bundle up processes to be easily consumed by other groups.

## COLLABORATION

It is unlikely that one central group in the organization understands every single business process upon which the organization relies. That is why collaboration is essential throughout the cycle of defining business processes, deploying them, and then iteratively improving and refining them as the business changes and grows.

AgilePoint promotes effective and productive collaboration by making sure that everyone can be involved and retains complete visibility throughout process life cycle. AgilePoint starts by providing a modeling environment that is built on top of Visio, leveraging existing in-house expertise and lowering barriers to adoption and use. AgilePoint then provides easy ways for one group to make a process available for other groups to include in their

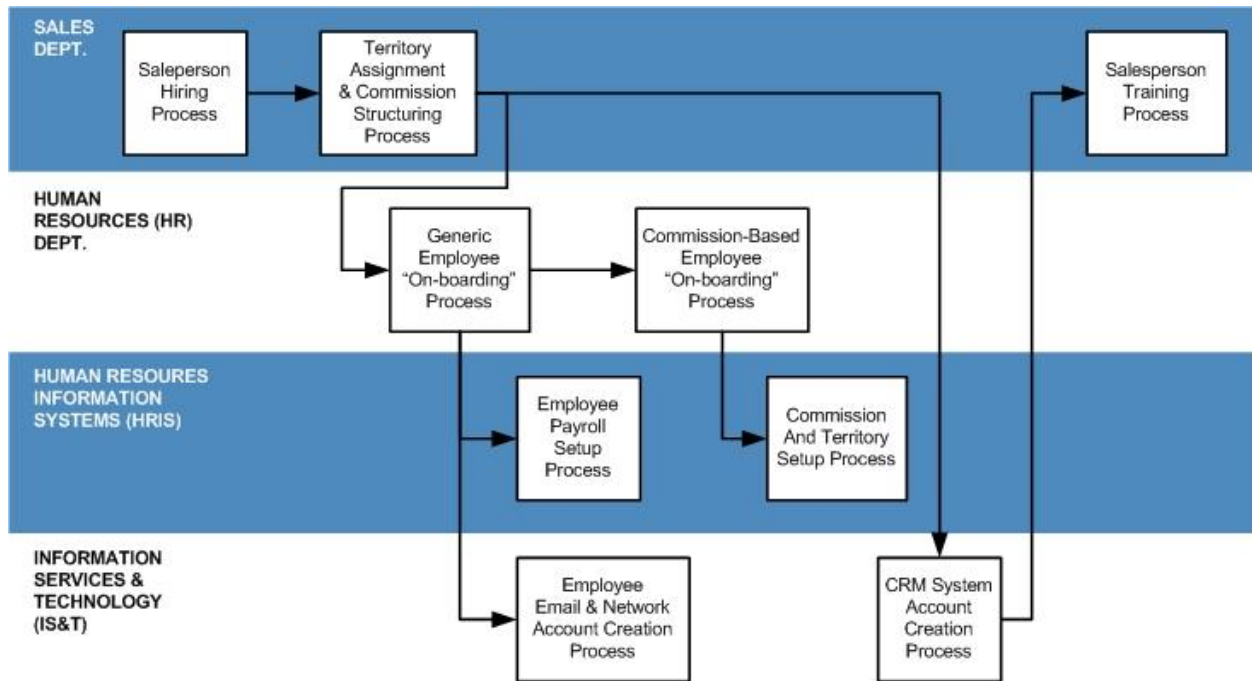
processes. We don't feel the effective collaboration is about everyone coming up with the design, and then one group doing all of the work. AgilePoint enables the work to be performed close to where the highest level of relevant knowledge resides. This diminishes risk, miscommunication and resource bottlenecks. AgilePoint is the reflection of a very nuanced and sophisticated understanding of how business processes can best be defined and refined in the real world. We don't believe that "no code" should be an absolute goal, or that all business process automation should be relegated to I.T. There is a far better option of facilitating the seamless integration of "no code" business process models, with I.T.-managed process compositions.

Effective collaboration is built on shared goals, and consensus around goals is easier to create in an environment with good information. Operational Business Intelligence (BI) key performance indicators (KPIs) provide the solid metrics from which processes can be iteratively refined for highest value delivery. The obvious place to collect those Operational BI KPIs is in the process. Many of our customers recognize this and have built Operational BI KPI collection into their process models. We are now working with key customers to dramatically simplify the association of Operational BI KPIs with process model elements. Additional details can be found in the "Building the Future with our Innovative Customers" section of this document.

## IN PRACTICE

Even a simple business process automation example amply illustrates these principles of agility, collaboration and effective division of labor. The diagram below outlines an example of high-level processes involved in bringing a new salesperson "on board."

### EXAMPLE: PROCESSES INVOLVED IN "ON-BOARDING" A NEW SALESPERSON



In this example, each process is placed in a band representing the department or division that best understands that process' details. The Territory Assignment and Commission Structuring Process is complex, and changes

several times per quarter. If the Sales Department is required to create specifications each time that the process changes, and hand those specifications over to the Information Services & Technology Division (IS&T) for execution, then several negative things are likely to occur:

1. Miscommunication because of the different “languages” used in the Sales and IT domains.
2. Misunderstanding of the specifications because IS&T is not privy to the market or strategic drivers behind the changes.
3. Frustrations because IS&T feels like they are being pulled in to the “churn” of frequent changes that they don’t understand, and because Sales feels like there is unnecessary “drag” in getting their frequent changes implemented.

AgilePoint allows each process to be defined and managed by the professionals who understand it most intimately. Processes can then be consumed by other processes across disciplinary and departmental boundaries. In addition, there are some processes that are fairly generic and widely reused, and other processes that are relatively specific and may only be employed for one business function. In the example above you see the separation of the more generic HR employee on-boarding process from the more specific process for the subset of employees who are paid commissions.

Separating creation and maintenance of process models by knowledge domain, frequency of change, and scope of reuse dramatically increases agility and effectiveness. By explicitly supporting these work patterns, AgilePoint puts *continuous process optimization* within the reach of every organization.

## CORE CAPABILITIES

### EASY AND ACCESSIBLE MODELING

AgilePoint Envision—AgilePoint’s Integrated Composition Environment (ICE)—is built on top of Microsoft Visio. AgilePoint provides a comprehensive set of out-of-the-box modeling elements for both LOB and I.T. users.

For LOB personnel:

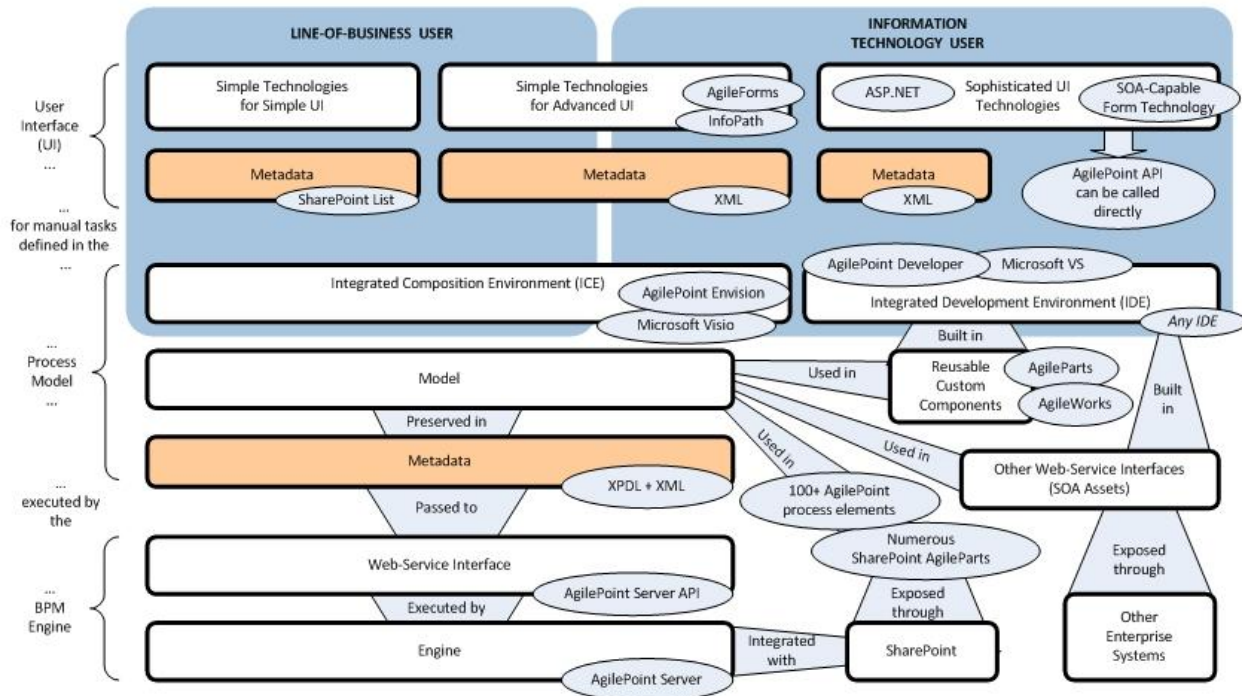
- Sophisticated work assignment capabilities
- Messaging & Meetings
- Document Management
- Easy use of I.T. custom pieces

For I.T. professionals:

- Easy to expose web services & service-oriented applications
- Create easy-to-reuse ICE components
- Insert custom code in process models (Java, C#, or VB.NET)
- Streamline process integration with SharePoint, Exchange & Active Directory

## METADATA-DRIVEN

Gartner Research notes that “Ascentn’s **metadata-driven IT asset-abstraction framework** [in AgilePoint] is a key concept ... Its model-driven development framework provides the necessary instrumentation to fully experience the value proposition of SOA.” We characterize AgilePoint as metadata-driven and model-preserving. The diagram below highlights the key areas where metadata is used within the AgilePoint suite.



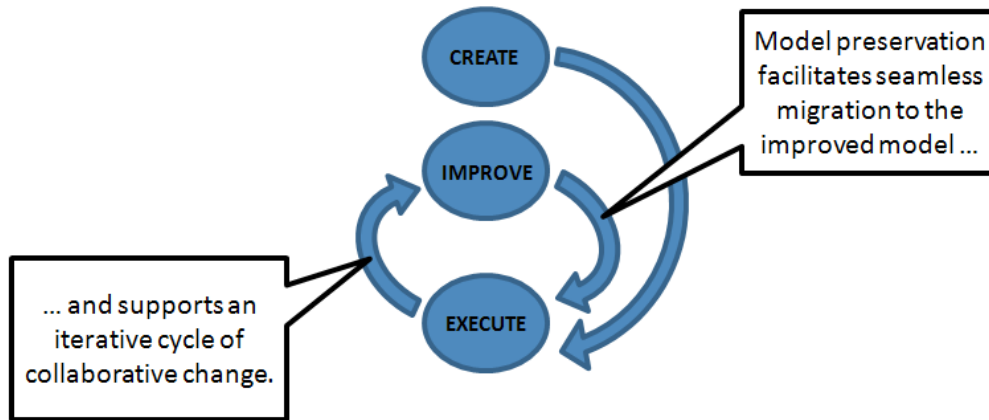
By using standards-based metadata, and avoiding compiling the process model to code, AgilePoint facilitates iterative refinement of process models. The use of metadata in conjunction with the various user interface (UI) technologies allows for dramatic streamlining of UI development, and excellent separation of presentation (look & feel) from logic (functionality)—making the UI forms or components much easier and less-expensive to maintain.

## MODEL-PRESERVING

Rich Seeley promotes “what you model is what you monitor” as an ideal for BPM solutions.<sup>2</sup> Seeley is focused on the improved visibility into process execution that a “model-preserving” approach provides—particularly for LOB personnel. However, there are other significant benefits to a model-preserving approach, such as facilitating sophisticated in-flight migration between process model definitions.

<sup>2</sup> SearchSOA.com, ‘BPM Special Report: What you model is what you monitor,’ Seeley, December 2, 2008

AgilePoint preserves the model through the entire process life cycle, as illustrated in the diagram below:



### AD HOC PROCESSES, HUMAN INTERACTION MANAGEMENT AND CASE HANDLING

Many BPM solutions falter when confronted with unstructured processes or tasks. Sometimes it is impractical or impossible to anticipate every scenario or possible process flow. In many cases, knowledge workers are best equipped to determine where a document should next travel, or which next step is appropriate. In these situations a BPM that supports dynamic process definition or modification is needed. The required changes may be as simple as manually assigning a responsible party for a given task, or as complex as *ad hoc* invocation of one or more sub-processes or process snippets. AgilePoint excels at handling these dynamic real-world scenarios.

### OPENNESS, EXTENSIBILITY AND VERSATILITY

Every portion of the AgilePoint solution has clean boundaries and is extensible. The ICE, Envision, can be extended with custom AgileWork components—for manual tasks—and custom AgileParts—for automated tasks. Web Services can be quickly and simply included directly in a process model, or wrapped up in application compositions and consumed as a sub-process. The complete and open web service API can be used to create custom dashboards, administration portals, or extend the backend and interact directly with the AgilePoint Engine. No matter how simple or complex the use cases are, AgilePoint supports them.

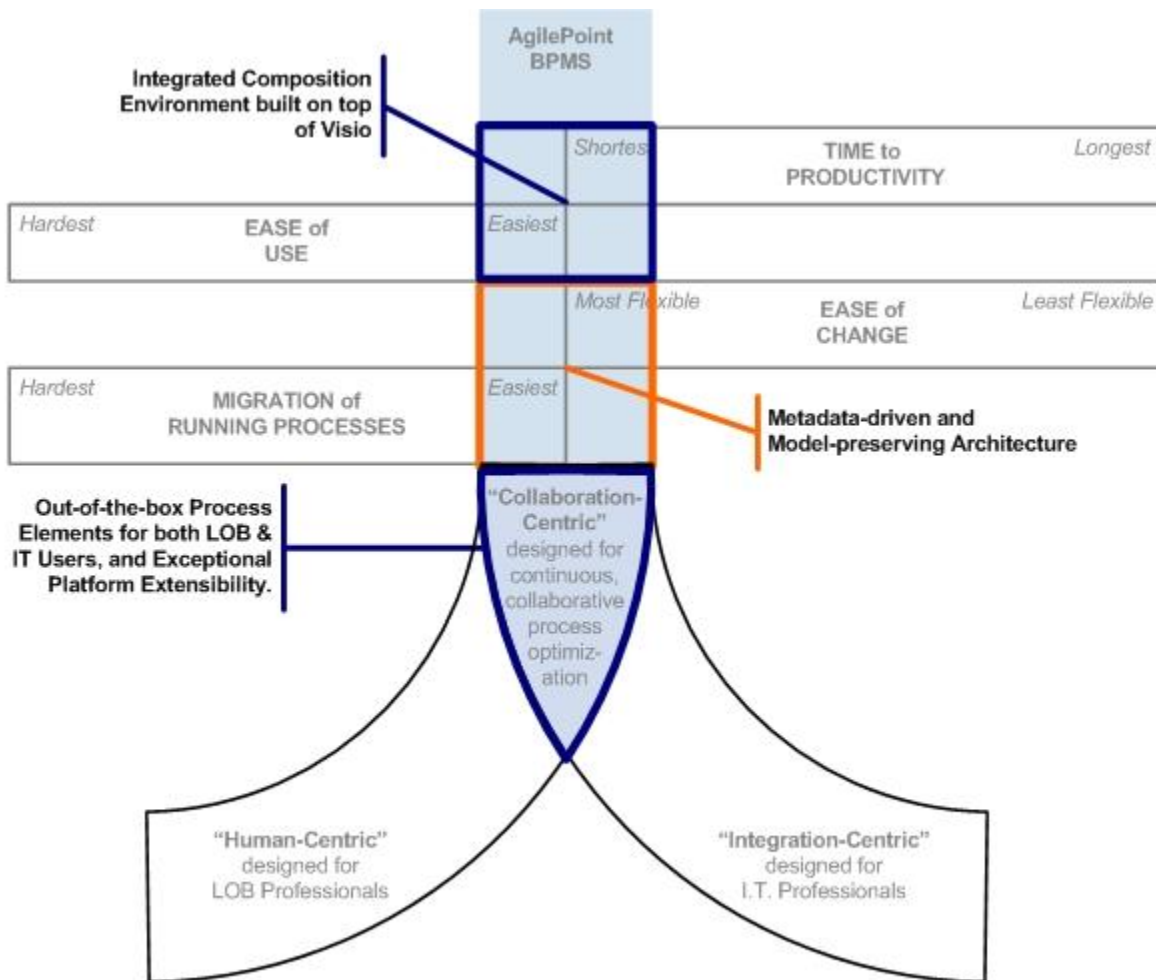
In addition, AgilePoint allows the use of any combination of form technologies within a given process. AgilePoint has remarkable out-of-the-box elements for extending and leveraging SharePoint and other Microsoft solutions. This is reflected in the best-supported forms technologies. Businesses are provided with the following versatile and fast form development options:

1. *AgileForms* provide a easy-to-use, web-based design environment for rapid creation of simple or sophisticated forms. AgileForm design is integrated seamlessly with the AgilePoint Envision process modeling environment. AgileForms provide the fastest and most fluid option for creating a series of related, but not identical forms.
2. *InfoPath forms* can be maintained by any user familiar with Office tools, and are easy and fast to develop. The InfoPath Forms Engine is part of SharePoint Server.

3. AgilePoint allows *ASP.NET forms* to be schema bound just like InfoPath forms, providing a very rapid development option. However, with ASP.NET using the schema-bound development approach is not required. ASP.NET provides an exceptional level of flexibility and control. And forms can be hosted on secure public web servers, allowing select internal assets and systems to be selectively exposed to external partners or customers.
4. *SharePoint List forms* are a remarkably simple and quick alternative. These forms are automatically created from SharePoint lists. This form option is ideally suited for internal forms where there are no requirements for sophisticated look and feel or functionality.

## IDEAL BPMS

In the Introduction the key characteristics of an “ideal” BPM solution were outlined. The diagram below links key features of AgilePoint to those desired characteristics.



AgilePoint is the only product that achieves this level of alignment with these core objectives.

## BUILDING FROM A SOLID FOUNDATION

The true robustness and versatility of AgilePoint's technology core is evidenced by the many partners who select AgilePoint as the first choice to complement their offerings. AgilePoint has partners who look to AgilePoint to provide the last mile Lotus Notes application conversion capabilities through its sophisticated rapid application composition capabilities. In addition we have partners who look to AgilePoint to provide robust process modeling and system integration capabilities on top of their solutions that expose SAP, Oracle, and other ERP solutions. Of course, this kind of relationship is symbiotic, allowing AgilePoint to deliver value to whole new groups of customers.

The ultimate testament to the quality of AgilePoint's technology is the many OEMs that elect to build their products on top of AgilePoint. The leading Digital Asset Management (DAM) solution in Europe is built on AgilePoint. Best of class CRM solutions are constructed on the solid foundation of AgilePoint. Global Logistics systems rest on our powerful and scalable core. Regardless of how high the stakes are, how large the enterprise is, or how critical the mission is, AgilePoint is repeatedly selected when only the best-crafted business process platform will suffice.

## BUILDING THE FUTURE WITH OUR INNOVATIVE CUSTOMERS

We were early to recognize the potential of a Business Process Platform as a Service (BPPaaS) on several fronts:

- lower initial licensing costs for customers, and serve new markets with small or fragmented budgets
- support utilization-based pricing and elastic provisioning
- eliminate installation and configuration requirements (as well as potential hardware procurement prerequisites)
- allow potential customers to easily test drive the product
- allow third-party solution providers to build on the AgilePoint foundation without becoming OEMs

We have finished making a secure, multi-tenant version of the AgilePoint engine, which we are piloting with select clients. We are looking forward to releasing our robust SaaS offering to the public in Q3.

We also recognize the power of facilitating easy collection of Operational Business Intelligence (BI) key performance indicators (KPIs) into the process model. We are working with key customers to build a modular set of extensions to our ICE that allow an indefinite number of Operational BI KPIs to be rapidly and intuitively associated with process elements, groups or elements, sub-processes, or custom components. We are also working to make sure that the collection of Operational BI KPIs no longer requires adding complexity to the core business process models.

We are expanding our community beyond our current customers, OEMs, and our OEM customers. With our SaaS offering and modular extensible architecture, we are keen to promote the capabilities of AgilePoint as a platform for process-based mashups, fast and easy integration with other SaaS solutions, and exposing process data through widgets and Web 2.0 components and sites. Our rock-solid core platform has historically been exploited by a relatively small community. We are looking forward to the opportunity to expose the power of AgilePoint to a larger community, and see the innovative ways that they extend our platform outwards.

## ABOUT ASCENTN

In a world of bewildering change, Ascentn Corporation is a company that you can count on. Large, highly-leveraged solution providers are closing their doors. *Ascentn is private, profitable, and stable.* Multi-billion dollar competitors are reevaluating their solution offerings. *Our commitment to providing the best BPM solution in the market is absolute and unwavering.*

Ascentn was founded six years ago with a vision of providing an elegantly-architected BPM solution that would work from simple workflows to the largest-scale enterprise processes, bridging functions and spurring multi-disciplinary collaboration along the way. The founding visionaries are still at the helm today, as we deliver the reality of a superior BPM solution at affordable prices to our swelling roster of satisfied clients.

From the outset, Ascentn has focused on providing excellent integration with Microsoft products and solutions. Ascentn is proud to be a Microsoft-certified Independent Software Vendor (ISV) and a Microsoft Gold Certified Partner. Ascentn helps customers take Microsoft-enabled productivity and combine it with AgilePoint-delivered process excellence. As SharePoint has gained market share, AgilePoint has empowered its customers to integrate SharePoint seamlessly with enterprise systems, and integrate external portals with internal SharePoint sites.

Ascentn has won significant recognition in the industry.

- Gartner - Model-driven BPMS for Process-based SOA Composition (Aug 2008)
- Gartner BPM Cool Vendor 2007
- Gartner BPM Magic Quadrant 2008 & 2009 – Visionary
- Forrester Human Centric BPMS for .NET 2008 – Strong Performer
- Microsoft Business Process Alliance - Charter Member
- Microsoft Office/SharePoint "14" TAP Program (2009)

The greatest honor is the trust that our customers place in our product to manage their most mission-critical processes, and the acknowledgement of our product's superior design by our many OEM partners who build their products on top of the solid AgilePoint foundation. To learn more about Ascentn and our industry-leading BPM suite, please visit <http://www.ascentn.com>

We look forward to helping you meet and surpass your process-optimization goals.