



Overview of the OMG's Business Motivation Model (BMM)

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Business Motivation Model

“A model for recording governance decisions”

- Describing the influencers that affect your business
- Documenting assessments of impact, options considered, decisions made - **and why**
- Referencing supporting detail - internal and external
- Building up history of cumulative effects

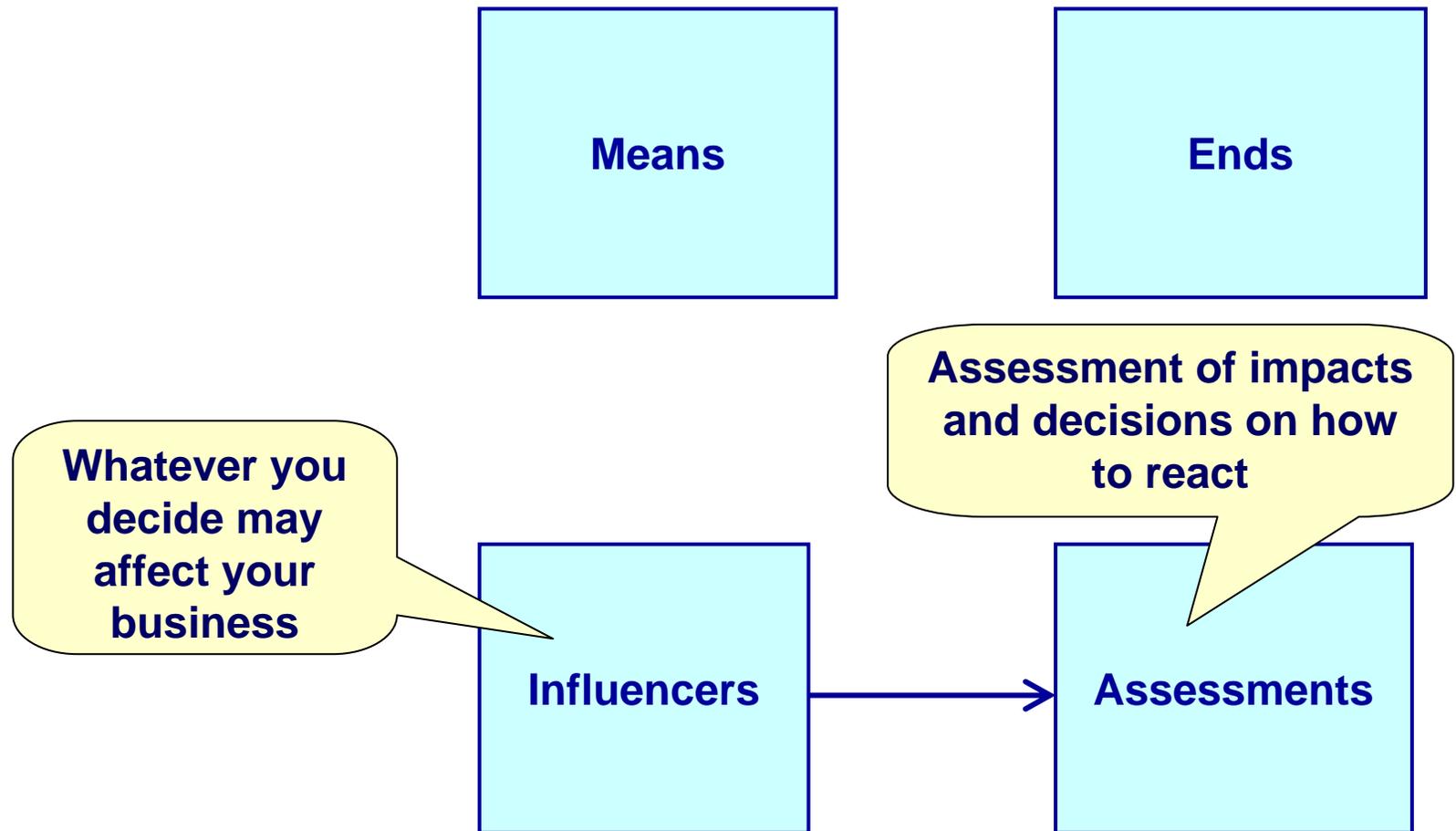
“A model for connecting governance to operations”

- Influencers to assessments
- Assessments to: desired results, business policies & courses of action
- Desired results, business policies & courses of action to the detail of operational business systems

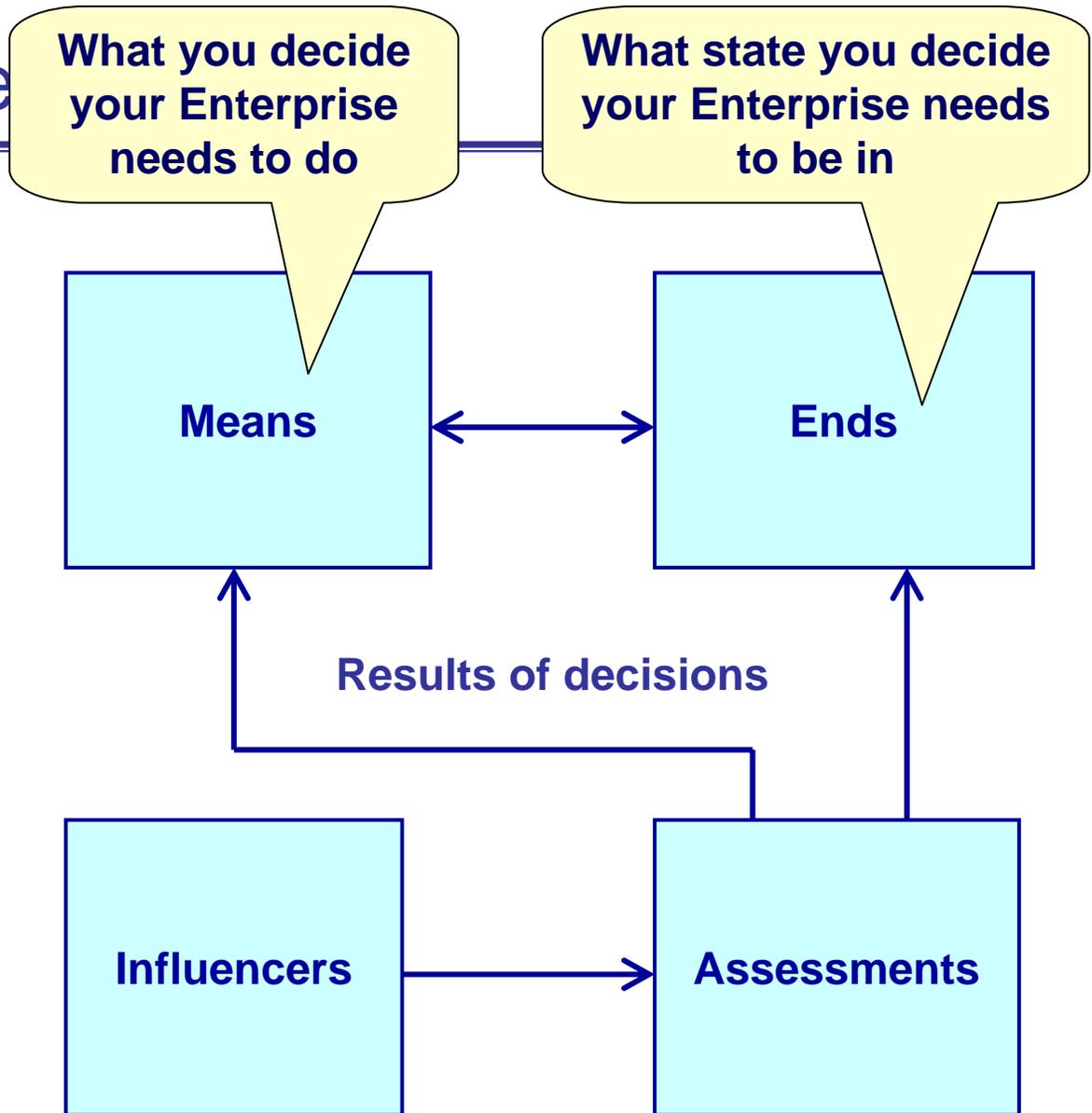
History

- November 2000: The Business Rules Group (BRG) published “Organizing Business Plans: The Standard Model for Business Rule Motivation” Used in practice since publication, with varying levels of support in tools
- 2004: BRG invited by Object Management Group (OMG) to submit for “Request For Comment” process (adoption as existing de-facto standard)
- January 2005: BRG Version 1.1 of the model published as “The Business Motivation Model” (BMM)
- September 2005: BRG Version 1.2 of the model published
- Dec 2005: BMM accepted by the OMG for RFC
- June 2007: completion of finalization for publication by OMG for general use
- September 2007: BRG Version 1.3 of the model published, downloadable from www.businessrulesgroup.org
- August 2008: formal publication by OMG of Version 1.0
- December 2008: completion of first revision – BMM 1.1

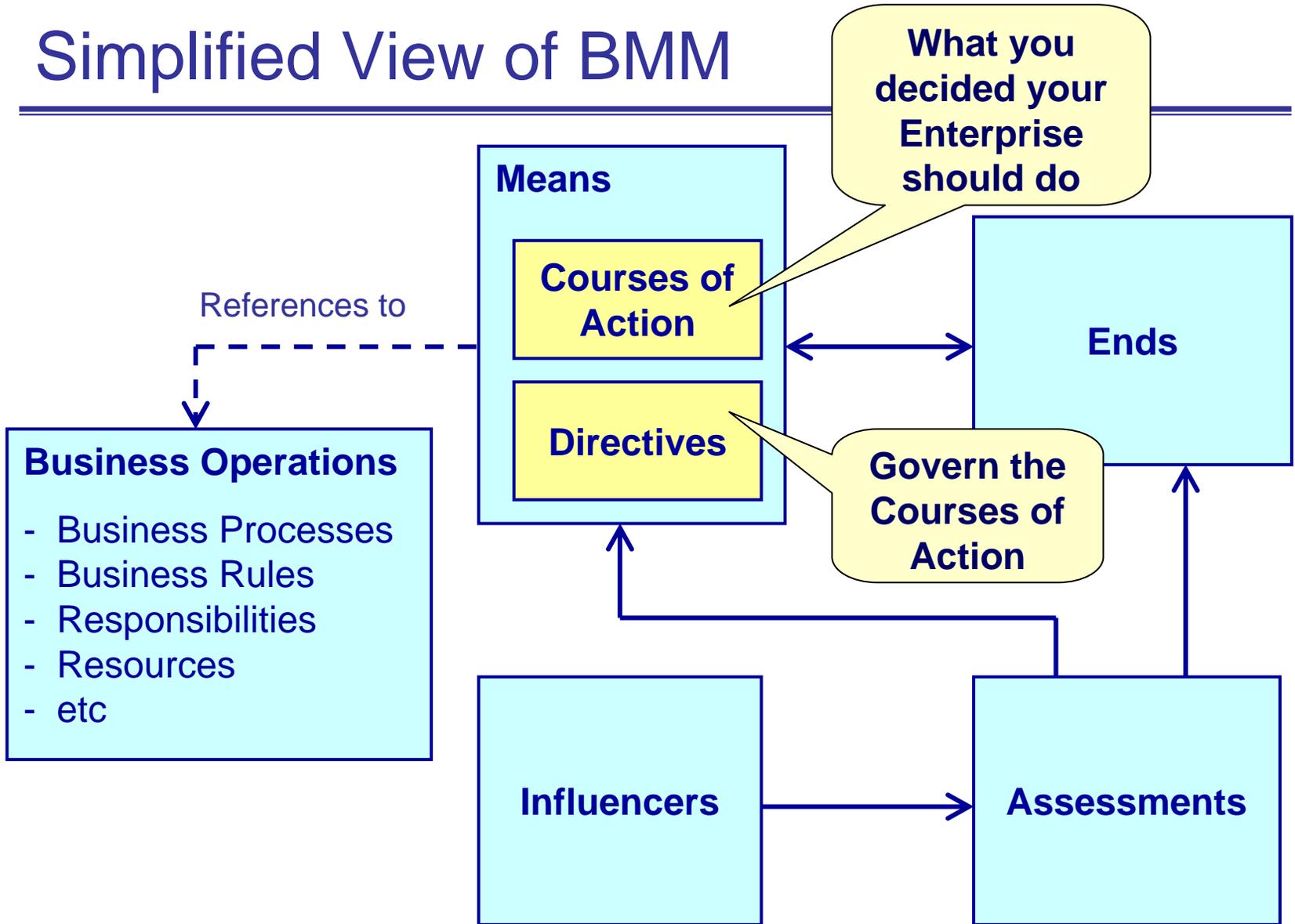
Simplified View of BMM



Simplified View

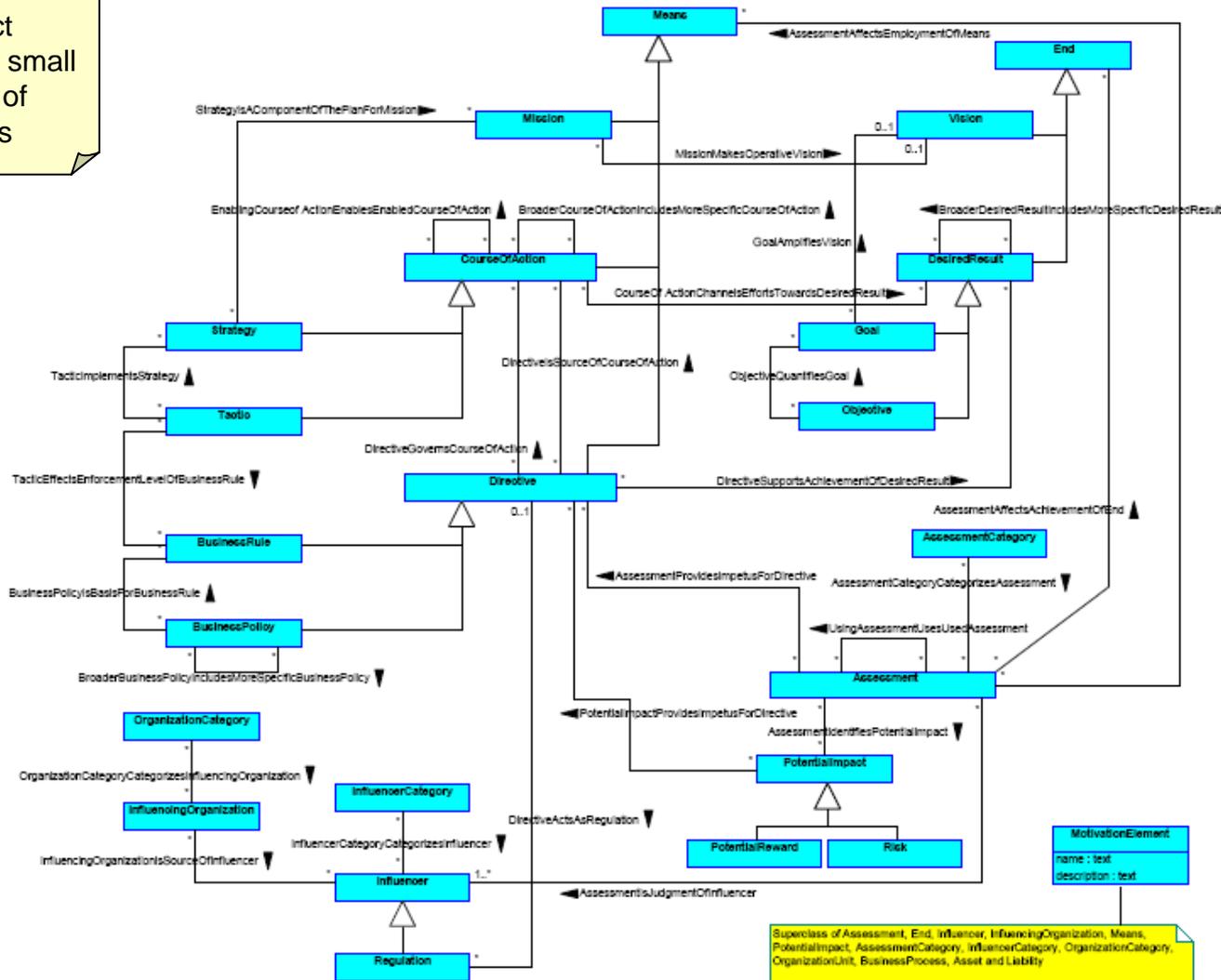


Simplified View of BMM

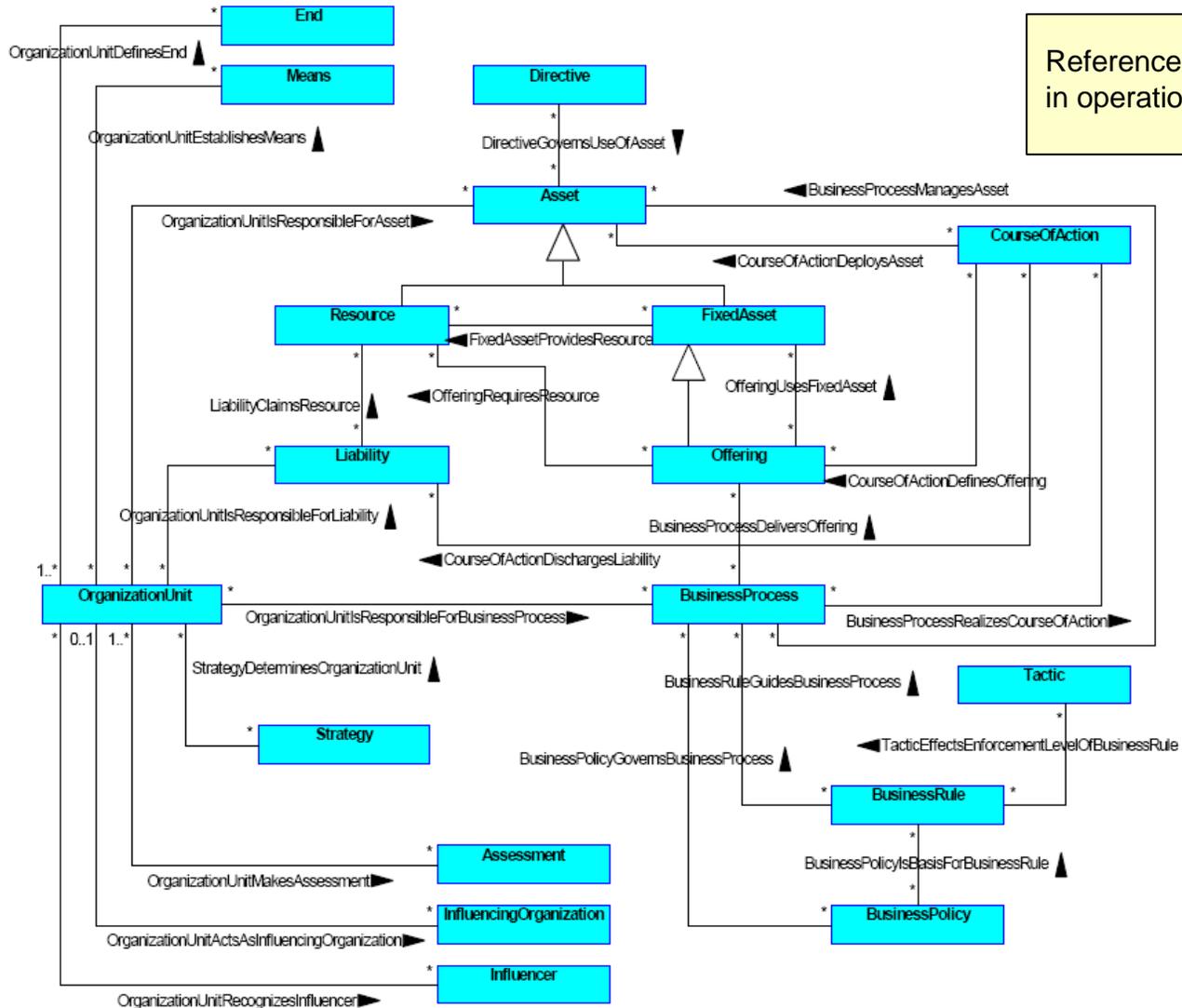


BMM Core Concepts

Compact model – small number of concepts

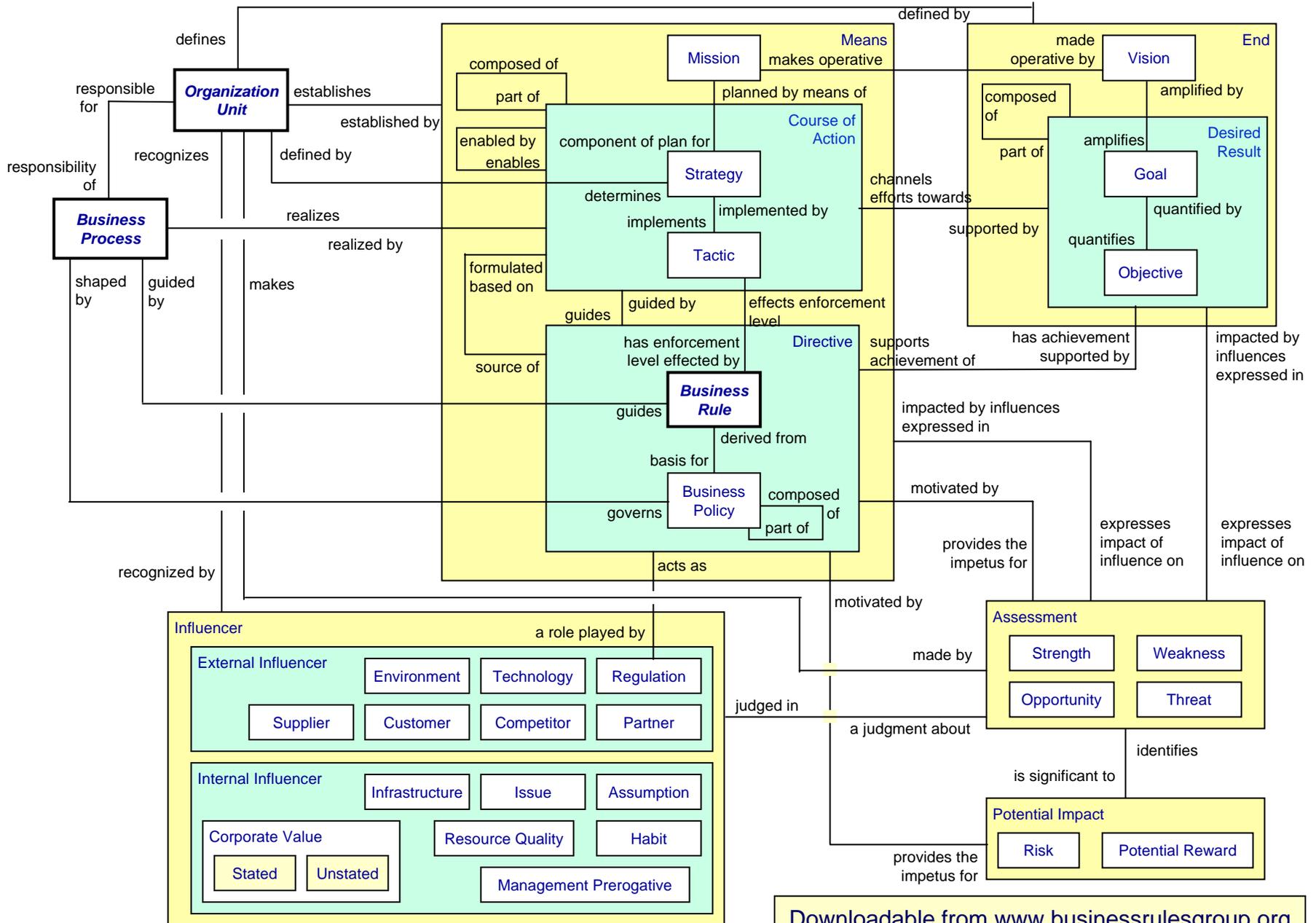


BMM “Placeholders”



References to changes in operational detail

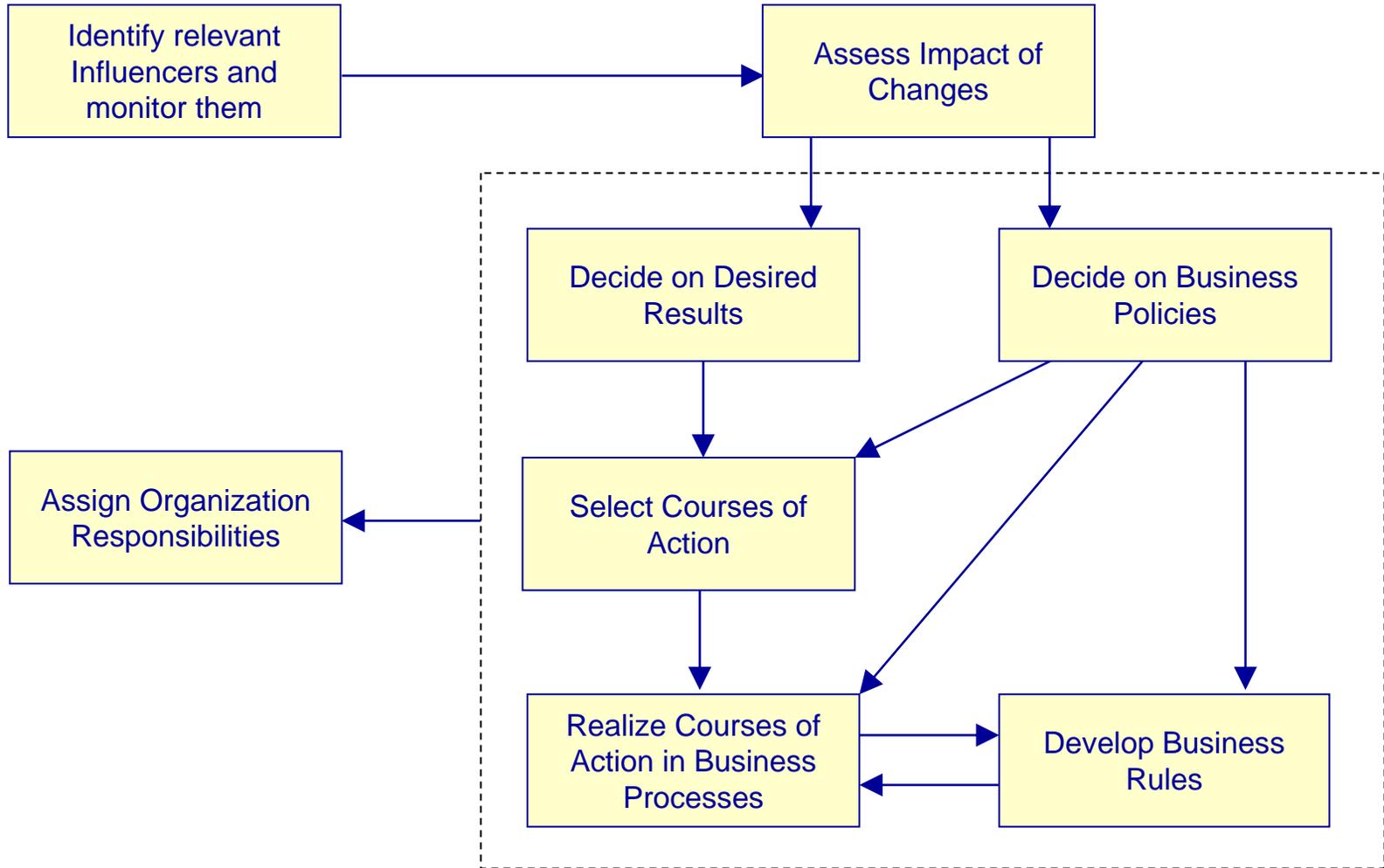
“Business Friendly” presentation from BRG



General Principles

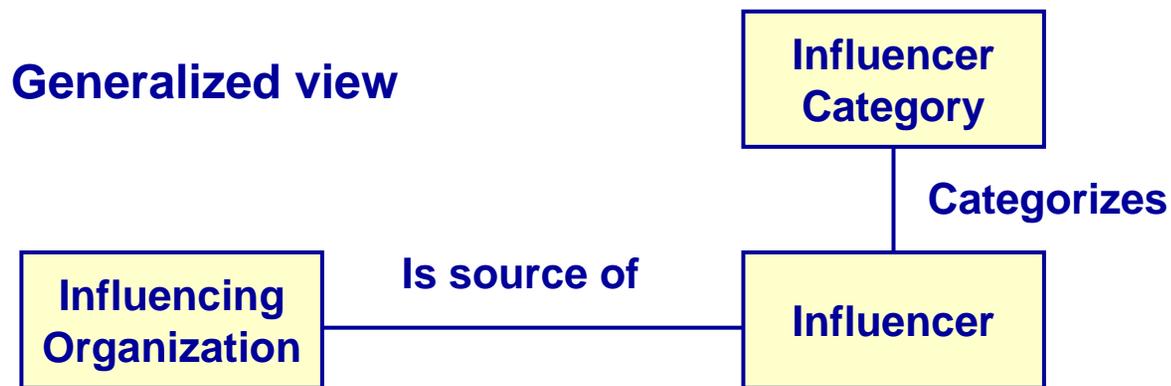
- The BMM is methodology-neutral, but some general principles are assumed:
 - Creation and population of an enterprise's BMM should be business-driven.
 - Maintenance of an enterprise's BMM should be driven by change – actually, the enterprise's decisions on how to react to change
 - The ability to deliver organized business plans is essential.
 - Business rules, business processes and organizational responsibilities are needed to operate the business, and traceability to and from the relevant elements of governance is essential.

Underlying (implied) Process



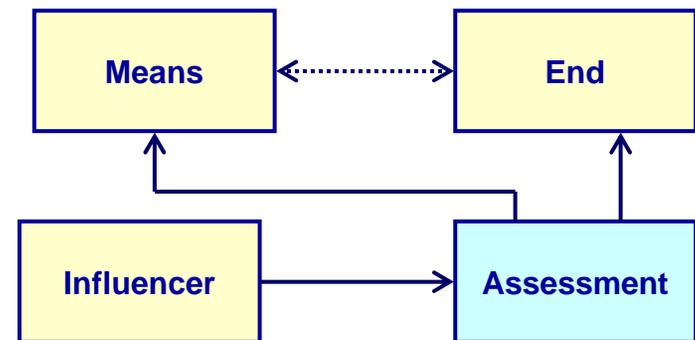
Core Concept: Influencer

- **External:**
 - Competition, Technology, Regulation ...
- **Internal:**
 - Infrastructure, Resource Quality, Habit ...
- Those given in the BMM are an example set
 - Could be changed or even completely replaced



Core Concept: Assessment

- Two parts:
 - Impact of change(s) caused by Influencers
 - Impacts of possible reactions to the changes
- Scenarios for reaction:
 - Industry and enterprise good practice
 - Creative thinking from within the enterprise
- Need:
 - Good information support
 - “What if?” tools



When to make assessments?

- External influencers cause changes:
 - The enterprise decides when they are significant enough to require strategic assessment
- Internal influencers require assessment:
 - Routine, e.g. annual budgeting, replacement of major assets
 - Exceptional, e.g. operational performance problems, new product/services created
- The enterprise fails to meet some of its major objectives

Many changes will be handled at operational level

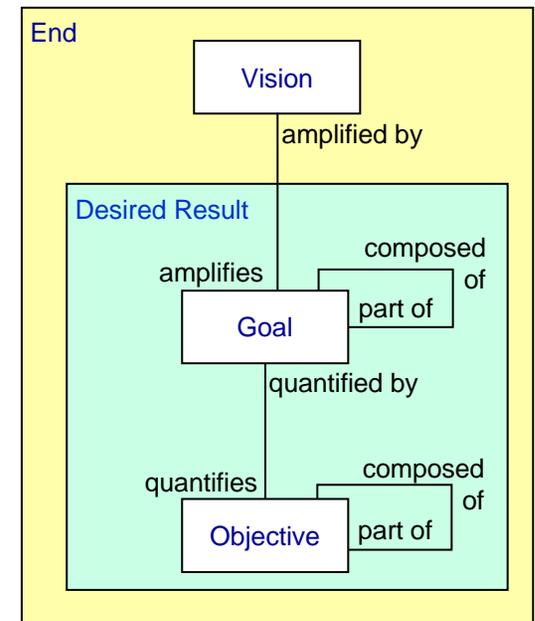
Core Concept: End

- Maintain current position
 - React to change in the environment (rather than seek to change the business) e.g. Regulation
 - Defensive activity to maintain current position
- Expand/diversify
 - Retain business model substantially unchanged
 - Add new products/services and/or operate in new territories
- New business model
 - Need a 'starter' model
 - Industry reference models may be good basis

Ends indicate the motivation

Ends

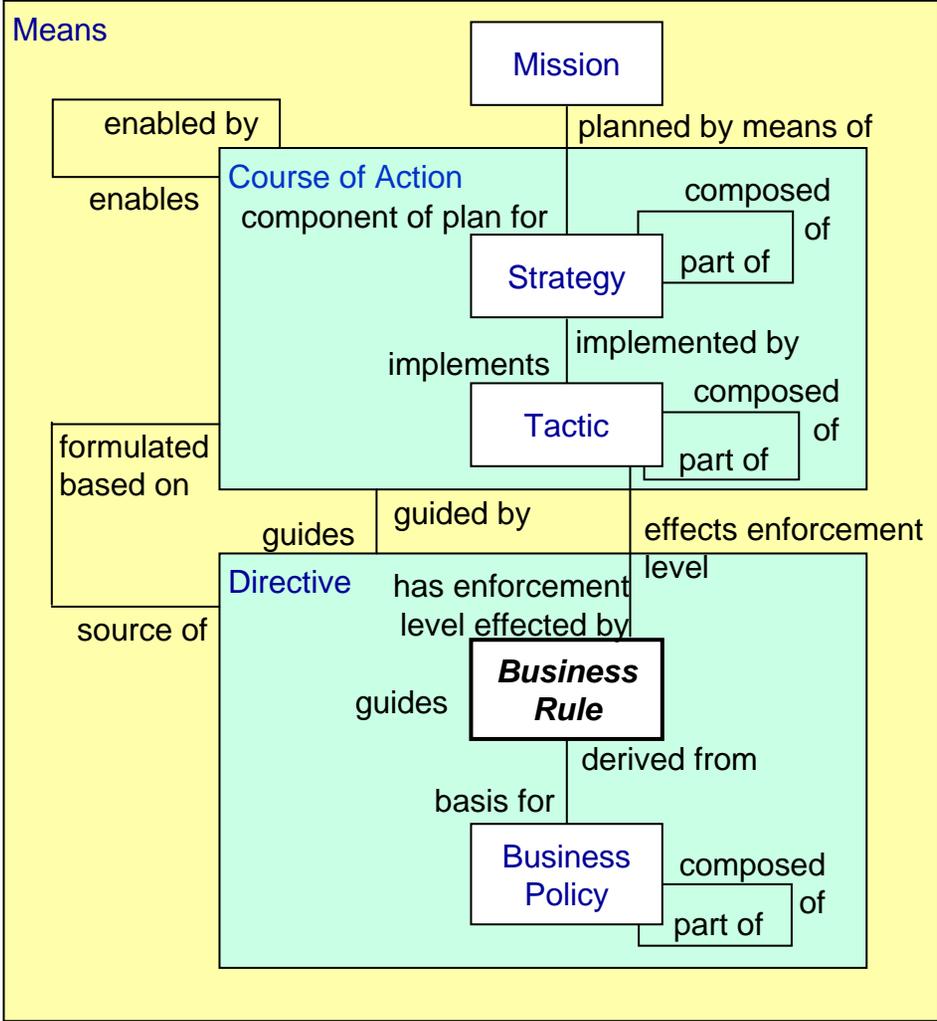
- Vision (what the enterprise aspires to be)
- Factored into Desired Results, at two levels
- Goal:
 - Longer-term direction for an aspect of the Vision
 - Direction may be adjusted over time
- Objectives
 - “Step along the way” towards a Goal
 - Quantified (“SMART”) :
 - Specific
 - Measurable,
 - Achievable
 - Relevant
 - Time-targeted



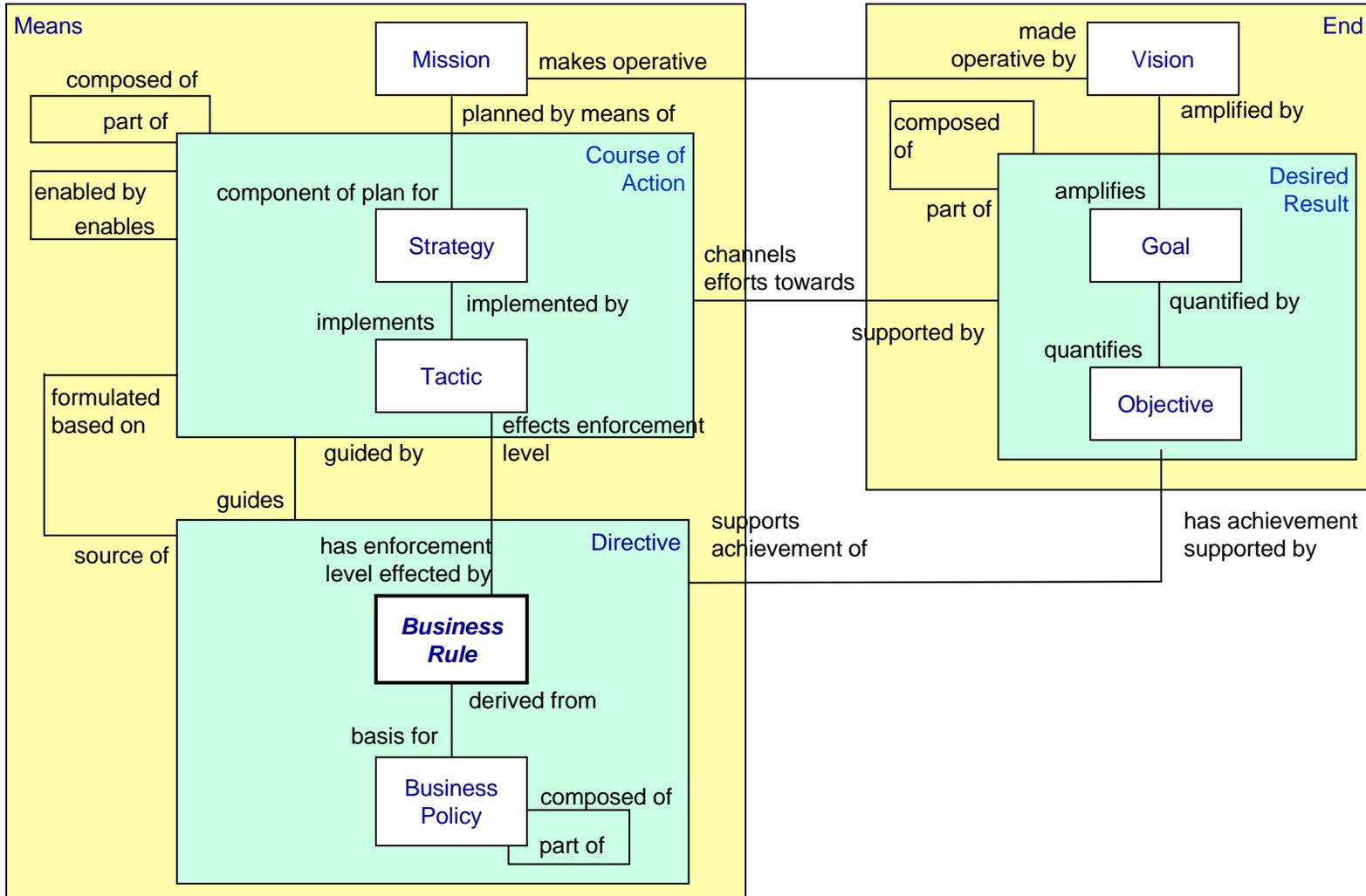
Core Concept: Means

- Mission (what the enterprise has to do in order to realize its vision) ...
- ... factored into complementary aspects:
- Courses of Action:
 - Strategies & Tactics
 - Best ways to deploy resources and capabilities to achieve Desired Results
- Directives:
 - Business Policies and Rules
 - Direct and constrain Courses of Action

Means



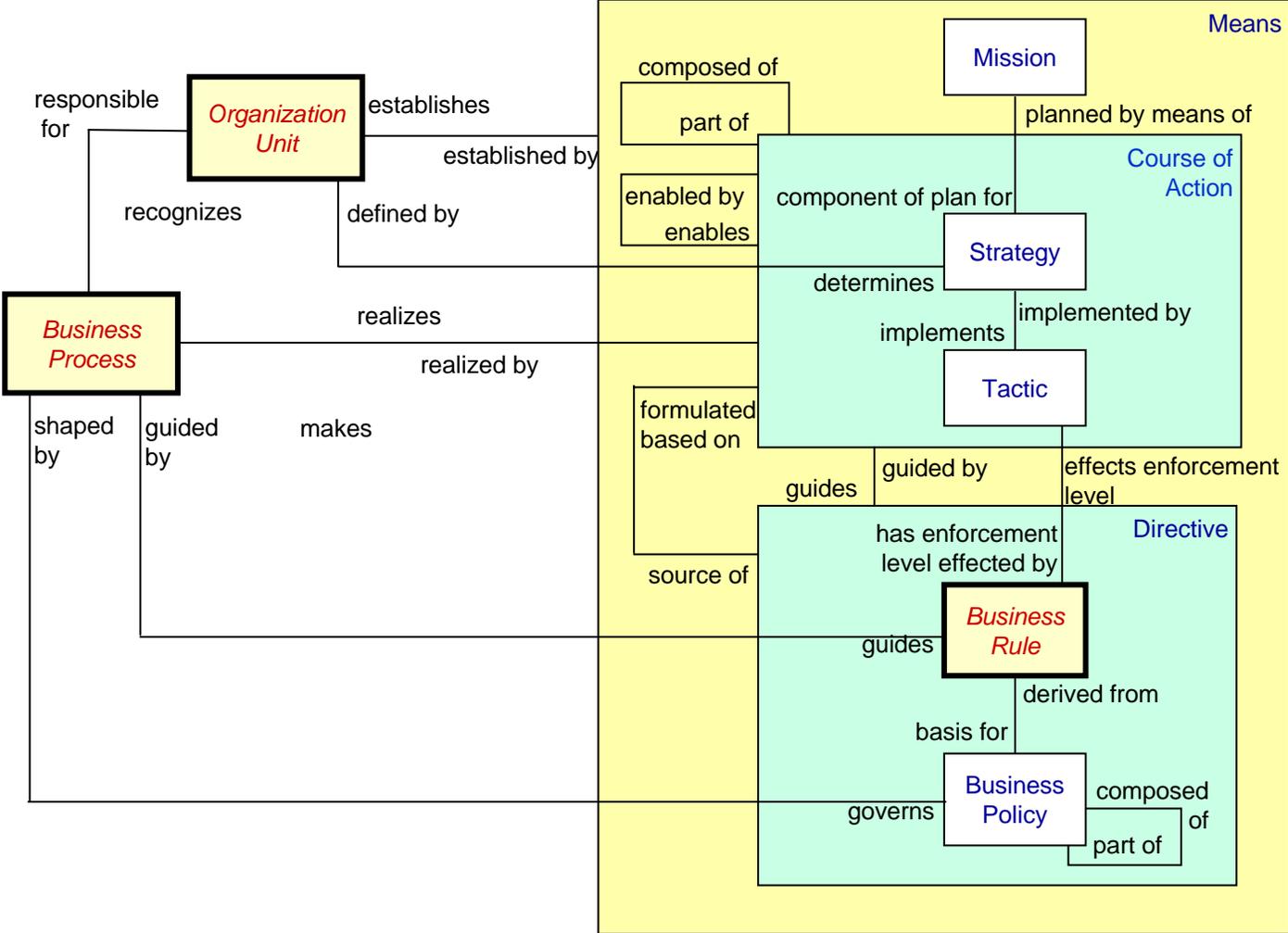
Means achieve Ends



Operational Detail

- Courses of Action and Business Policies reference operational detail:
 - ... supported by OMG standards
 - Business Processes
 - Business Rules
 - Organization Units (roles & responsibilities)
 - ... not yet supported by OMG standards
 - Resource, Asset, Liability, Offering
- References can be plain text, document names, URIs ...

Operational Detail



Attributes

- Identifier and text description
- Tool vendors could choose to add more
- Simplest visualization – description includes references (e.g. document names, URIs) for detail:
 - Documents
 - Spreadsheets
 - Decision support applications and services
 - External sources
 - Etc.

Performance (simple view)

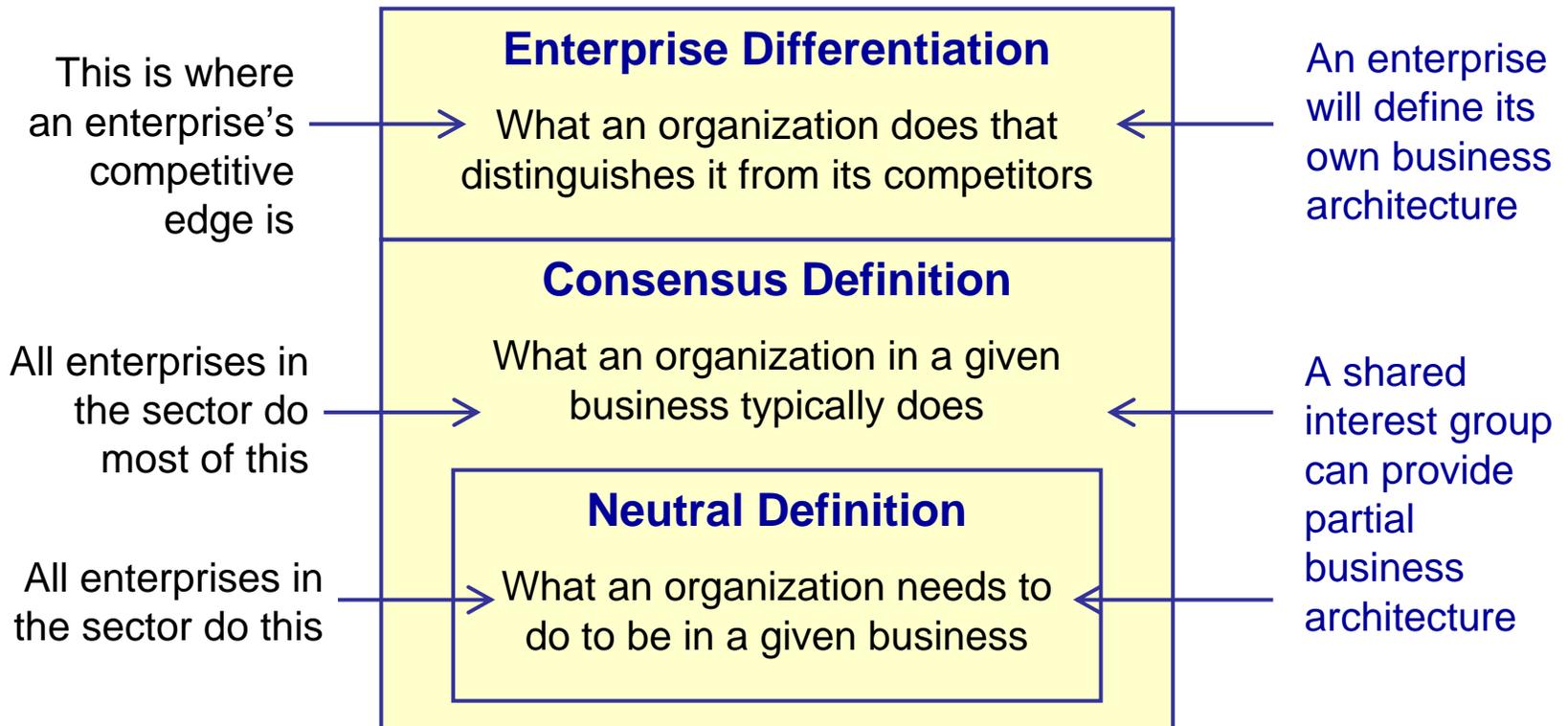
- The BMM is a tool for governance:
 - “Are we doing the right things?”
 - Changes made as a result of Assessments are about what the enterprise does and why: Desired Results, Courses of Action and Business Policies
 - Is changing the things you can control affecting the things you can't?
- Operational performance also has to be managed:
 - “Are we doing things right?”
 - Below the BMM horizon
 - Mainly handled in business process management and workflow management systems
 - Some measurements may be aggregated for “actuals” to be compared with Objectives
 - Major operational problems may emerge as Internal Influencers in the enterprise's BMM

Metrics

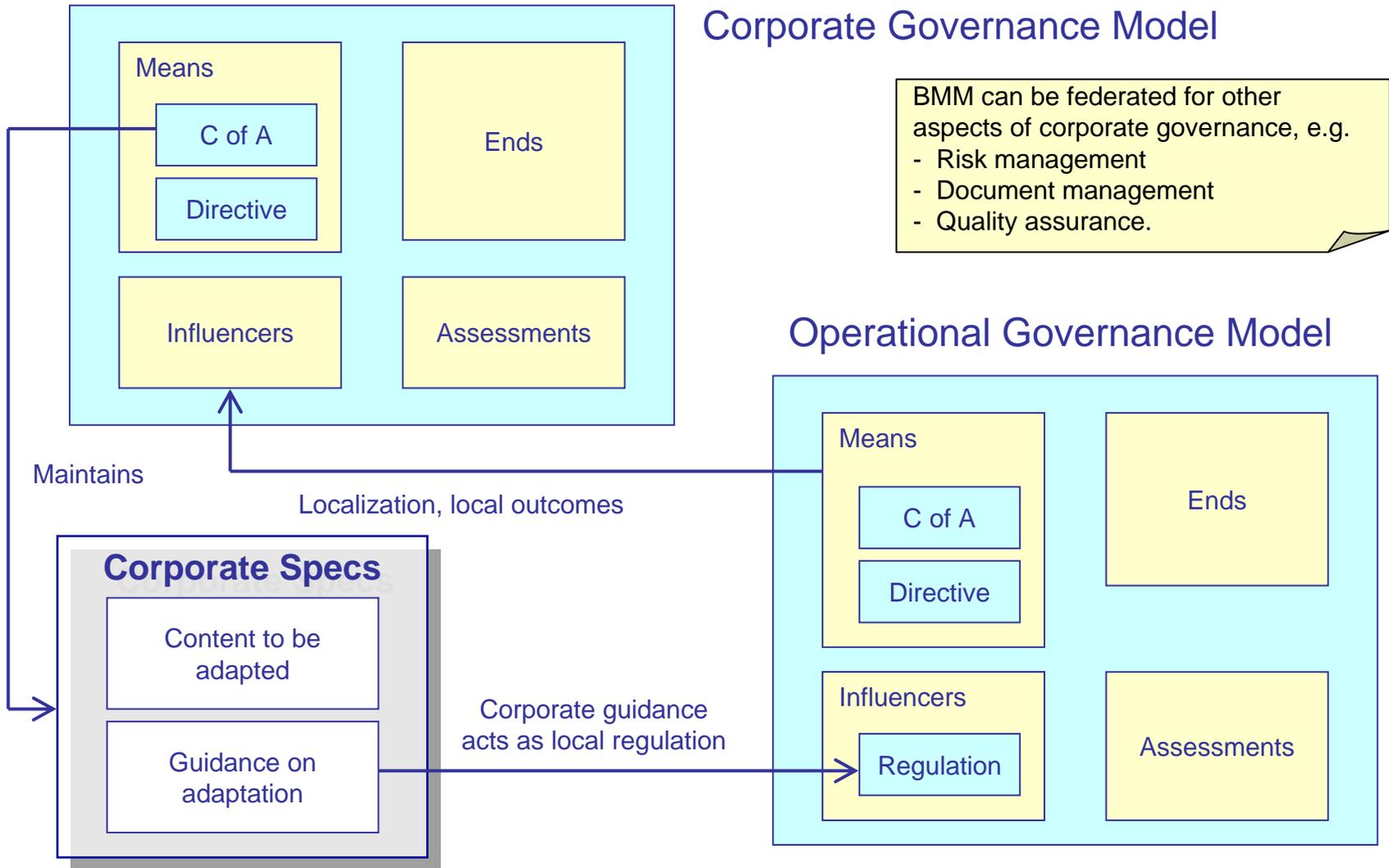
- Potential Impact:
 - What Risk or Potential Reward
- Goal:
 - What must be achieved, by when
- Purpose of BMM repository:
 - Is to connect the measurements to the related elements in the BMM, e.g.
 - The risks and potential rewards considered in assessing the effect of an influencer
 - The objectives set/modified as a result of an assessment, and the Courses of Action and Policies that support them
 - **Is not to contain all the detail** – this can be done better in other tools

Shared Models

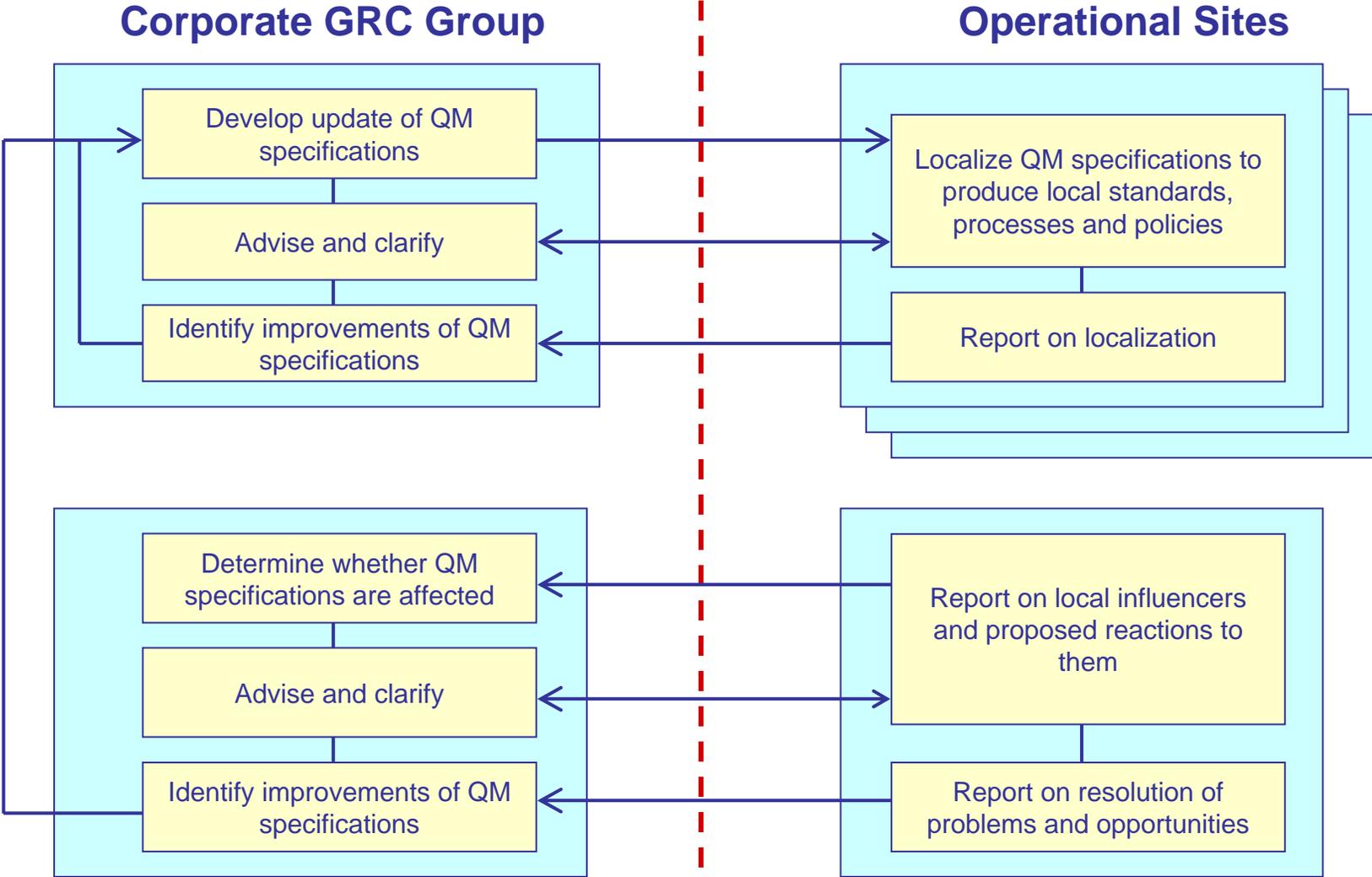
Collaboration in a Shared Interest Group



Business Motivation Model in two roles



Corporate and Operational interactions



Dealing with local influencers

- Dealing with operational problems, opportunities, etc. is the responsibility of operational management, (although Corporate can advise on some aspects)
- Corporate concerns:
 - Is the operational site doing the right things?
 - If not, why?
 - Could the Corporate Specification content be improved to provide a better basis for localization?
 - Could the localization guidance be improved?
 - Is the operational site doing things right?
 - If not, operational management has to bring it back into compliance – but could the Corporate Specifications have ensured that better controls were in place?
 - Are the influencers relevant to other operational sites?

Summary

- High-level metamodel for enterprise governance models
- Industry commitment to tool support
- Supports audit trail for change management:
 - Influencers, Assessments, Ends, Means directly
 - References to operational detail
- Models are interchangeable between compliant tools
- Business-oriented
 - Models can be expressed in business-friendly form
- BMM can be federated for corporate governance – corporate policy group is internal regulator
 - General ‘reaction to change’ mode
 - For regulation, with more elaborate regulation model
 - For other specialized aspects – risk management, quality assurance, documentation and reporting ...
- Similar “federation” will support industry group representative negotiating with regulator on behalf of group members