

FROM PROCESS DRIFT TO SHARED OWNERSHIP IN A BPM CASE STUDY OF PRESALES TRANSFORMATION IN AN IT CONSULTING SME

*Maksymilian Surdziel¹,
Katarzyna Gdowska²*

Abstract

Background and Objective: Business Process Management (BPM) research has predominantly focused on large organisations, while its adoption in small and medium-sized enterprises (SMEs) remains underexplored. Many SMEs in IT consulting operate with informal, drift-prone processes that limit coordination, transparency, and scalability. This study examines how lightweight BPM interventions can stabilise a presales process in a low-maturity SME, with particular attention to organisational dynamics such as resistance, adaptation, and the emergence of shared process ownership.

Study Design/Materials and Methods: An explanatory single-case study was conducted in a medium-sized Polish IT consulting firm, following the full BPM lifecycle: process identification, discovery, analysis, redesign, implementation, and monitoring. Empirical data were collected through 12 semi-structured interviews and two cross-departmental workshops involving the Sales, Technical, Finance, and Delivery Center teams. The as-is process was modelled in ARIS using BPMN 2.0, while value stream mapping and root cause analysis were applied to diagnose inefficiencies. In the absence of prior performance data, baseline presales KPIs were estimated through data triangulation.

Results: The intervention resulted in the establishment of a dedicated Presales Department, more explicit role definitions, and the systematic early involvement of technical expertise. Lightweight BPM artifacts—including BPMN-based process models, Project Barrier forms, and Win/Loss Analysis forms—supported coordination, learning, and monitoring. Baseline performance indicators were formalised, revealing a win rate of approximately

¹ AGH University of Krakow, Poland, surdziel@student.agh.edu.pl, [ORCID: 0000-0001-5320-1533](https://orcid.org/0000-0001-5320-1533)

² AGH University of Krakow, Poland, kgdowska@agh.edu.pl, [ORCID: 0000-0002-7964-3724](https://orcid.org/0000-0002-7964-3724)

25%, an average response time of 14 days, and an average margin of 25%, with targets set at $\geq 35\%$ and ≤ 10 days, respectively. Early outcomes indicate reduced process drift, improved cross-functional collaboration, and increased managerial visibility.

Practical Implications and Conclusion: The study demonstrates that even in low-maturity SME contexts, incremental, lightweight BPM practices can yield meaningful structural and cultural improvements without advanced technologies. By clarifying ownership, enabling basic measurement, and fostering shared responsibility, BPM can serve as a pragmatic pathway for SMEs seeking to stabilise core processes and build readiness for continuous improvement.

Keywords: BPM in SMEs, process maturity, case study, digital transformation, business process management

JEL classification: M15

Paper type: case study

1. Introduction

Business Process Management (BPM) systematically models, analyses, and improves organisational operations to achieve measurable outcomes (Dumas et al., 2013; Harmon, 2019). Rather than optimising isolated tasks, BPM enhances end-to-end performance by aligning activities, roles, and decision logic across functional boundaries. Despite these advantages, many SMEs operate with low process maturity, lacking formal procedures, centralised data, and performance monitoring. This often results in fragmented responsibilities, informal routines, and a heightened risk of process drift, where actual operations diverge from intended practices.

SMEs face distinct barriers to BPM adoption, including limited resources, a lack of in-house expertise, and cultural resistance to formalisation. Processes often evolve informally in fast-growing firms, becoming person-dependent and hard to scale. Efforts to introduce structure may be viewed as bureaucratic, reinforcing resistance among operational staff. These challenges make BPM adoption a socio-organisational as well as a technical undertaking. Empirical studies confirm that many Polish organisations operate with low BPM maturity, often within siloed structures and informal workflows (Sliż et al., 2024; Brzychczy et al., 2024). This reflects broader trends in Central and Eastern Europe, where structural and cultural barriers hinder BPM adoption (Gabryelczyk et al., 2022; Di Ciccio et al., 2024; Jeston & Nelis, 2008). Nevertheless, increasing BPM maturity is associated with greater agility, responsiveness, and performance.

Despite a growing body of BPM research, existing studies predominantly focus on large organisations or technologically advanced BPM initiatives, such as process mining, automation, or analytics-driven optimisation (Dumas et al., 2013; Harmon, 2019; Di Ciccio et al., 2024). In contrast, there is limited empirical insight

into how BPM can be operationalised in small and medium-sized enterprises characterised by low process maturity, informal routines, and scarce performance data (Er & Nurmadewi, 2021; Okręglicka et al., 2015; Gabryelczyk et al., 2022; Sliż et al., 2024). In particular, prior research offers little explanation of the organisational dynamics that emerge when formal BPM practices are introduced into drift-prone processes that have evolved organically over time (Benner & Tushman, 2003; Bartelheimer et al., 2023; Rosemann et al., 2024; Jurczuk, 2021; Ozkan et al., 2024). This study addresses this gap by providing an explanatory case study of a BPM-enabled presales transformation in a medium-sized IT consulting firm, focusing not only on structural outcomes but also on resistance, adaptation, and the emergence of shared process ownership.

Prior BPM literature consistently emphasises that foundational practices—such as role clarification, stakeholder engagement, explicit handovers, and basic performance measurement—are critical prerequisites for effective process management in organisations with low process maturity (Dumas et al., 2013; Jeston & Nelis, 2008; Harmon, 2019). Empirical studies from Central and Eastern Europe further indicate that many SMEs continue to operate with informal, functionally siloed processes, weak process ownership, and limited performance data, which constrain their readiness for more advanced BPM technologies (Okręglicka et al., 2015; Gabryelczyk et al., 2022; Sliż et al., 2024). Similar patterns have also been reported in international SME-focused studies, highlighting resource constraints, person-dependent routines, and ad hoc coordination as persistent barriers to BPM institutionalisation (Er & Nurmadewi, 2021; Ozkan et al., 2024).

Within the focal firm, the presales process, spanning initial client contact through proposal submission, had evolved in an unstructured, ad hoc manner. It suffered from inconsistent documentation, misaligned responsibilities, and poor cross-department coordination. The recent acquisition of an internal software unit (the Delivery Center) further complicated workflows, as it remained disconnected from presales activities. Addressing these challenges required both process redesign and a shift towards shared ownership (Surdziel, 2024).

To guide this study, we pose the following research questions:

Main Research Question (MRQ): What organisational dynamics—including resistance, adaptation, and cross-functional coordination—emerge when formalising a drift-prone presales process in a low-maturity SME, and how do these dynamics shape outcomes?

Detailed Research Question 01 (DRQ_01): Which lightweight BPM artifacts (models, metrics, forms) proved most instrumental in sustaining change?

Detailed Research Question 02 (DRQ_02): How does introducing a dedicated Presales function and basic CRM (Customer Relationship Management) system support the alignment between business goals and process execution?

The intervention, described in this paper, followed the established BPM lifecycle (Dumas et al., 2013; Harmon, 2019). The presales process was selected based on its strategic relevance and low maturity. The company lacked prior BPM initiatives, had limited structured process data, and operated with a siloed structure typical of low-maturity SMEs. We employ an explanatory case study design to investigate how organisational dynamics influenced outcomes during presales formalisation (Yin, 2018). The study encompasses the entire BPM lifecycle, spanning identification, discovery, analysis, redesign, implementation, and monitoring (see Dumas et al., 2013; Harmon, 2019). The unit of analysis is the presales process in the focal organisation. This paper answers the research questions through a longitudinal case study of presales transformation in an SME context. Section 3 presents the organisational setting. Section 4 outlines the actions taken. Section 5 presents the results and implications, which are discussed in Section 6. Section 7 concludes with lessons learned.

2. Background

While emerging technologies (e.g., robotic process automation, blockchain, process mining) are receiving increasing attention in BPM research (Sliz et al., 2024), foundational practices remain central in low-maturity contexts. Core lifecycle activities, such as stakeholder engagement, process mapping, role clarification, the definition of entry/exit criteria, and basic Key Performance Indicators (KPI) tracking, provide the scaffolding for later advancements (Dumas et al., 2013; Harmon, 2019; Jeston & Nelis, 2008). In organisations with scarce data and fragmented responsibilities, lightweight forms and templates, structured reviews, and iterative BPMN modelling can be more feasible than advanced analytics. The presented case foregrounds these fundamentals and links them to the cultural dimension of organisational change.

Research by Abdelaziz and Khalil (2023) highlights the importance of presales as a pivotal phase in high-tech companies. Their work demonstrates that early involvement of technical and business experts significantly affects outcomes, a finding reflected in our case as well. De Sordi (2023) emphasises the managerial perspective on integrating people, processes, and technology, underscoring that BPM adoption is not merely technical but also cultural. The ARIS platform, used in our study, is well established in BPM practice (Davis & Brabander, 2007) and provides accessible tools for modelling and analysis. Taken together, prior research suggests that even basic BPM practices can yield disproportionate benefits in SMEs when implemented with consideration for context.

3. Methodology

This study adopts an explanatory case study design to investigate how organisational dynamics shape outcomes when a drift-prone presales process is formalised in a low-maturity SME (Yin, 2018). The research follows the full BPM lifecycle: identification, discovery, analysis, redesign, implementation, and monitoring (Dumas et al., 2013; Harmon, 2019). The unit of analysis is the presales process within the focal organisation.

Data collection consisted of 12 semi-structured interviews and two cross-departmental workshops conducted from March to October 2024 (Surdziel, 2024). Interviewees represented Sales, Engineering, the Delivery Center, and Finance, including the Head of Sales, Lead Solution Architect, Delivery Center Manager, CFO, and senior project managers. Interviews lasted 45–60 minutes and covered four analytical dimensions: (1) the actual flow of presales work, (2) recognised inefficiencies, (3) communication practices, and (4) role clarity. Workshops lasted half a day and combined model validation with introductory BPM training, supporting both data triangulation and capability building (Surdziel, 2024). The as-is process was modelled in ARIS using BPMN 2.0 (Davis & Brabander, 2007). ARIS features such as version control, stakeholder commenting, and variant comparison helped consolidate viewpoints and reconcile discrepancies. The modelling phase revealed missing inputs, redundant loops, and inconsistencies in handovers. The analysis phase employed value stream mapping to understand the time/value distribution across activities and root cause analysis (five whys) to diagnose delays in approvals, inefficient information flow, and gaps in the feasibility assessment. Because the company had never measured presales performance, baseline KPIs (win rate, response time, margin, qualitative complexity index) were estimated through the triangulation of interview insights and available sales records. Although Kotter's eight-step model (2012) was referenced by the organisation when sequencing change activities, it served primarily as a broad guiding framework rather than a core theoretical component and was therefore not used as an analytical lens for interpreting the results.

The methodological structure was intentionally separated from the case narrative to improve transparency, replicability, and analytical rigour.

4. Case Description: Presales Process Transformation

The case concerns a medium-sized IT consulting firm operating in a low-process-maturity environment. Prior to the BPM initiative, presales activities were handled in a largely bespoke and unstandardised manner, with limited formal coordination across Sales, Technical, Finance, and the Delivery Center. Knowledge generated during presales was rarely captured or reused, and responsibilities were often assumed informally rather than being explicitly assigned. A key challenge was the fragmentation of information (Surdziel, 2024).

The organisation lacked a centralised CRM or unified system for managing client interactions and sales leads. Instead, customer data and proposal documents were distributed across individual inboxes and local folders, resulting in inconsistencies and limited transparency. This fragmentation hindered cross-functional collaboration and made the application of data-driven BPM techniques infeasible, reflecting challenges commonly observed in low-maturity SMEs (Sliz et al., 2024; Di Ciccio et al., 2024). Although the firm had introduced a Presales and Offers Manager role, process ownership remained unclear. Sales and technical staff frequently engaged in presales activities on an ad hoc basis, resulting in gaps in feasibility assessments, inconsistent solution design, and increased coordination effort. These conditions motivated the selection of the presales process as the focus of the BPM intervention described in this study. Although the presales process was modelled in detail using BPMN 2.0 within the ARIS platform, the complete diagrams cannot be disclosed due to organisational confidentiality constraints. To support transparency and readability, the paper includes an abstract and high-level representations of the presales process before and after the BPM intervention. These figures preserve the core structural logic and role interactions identified during BPMN modelling, while omitting proprietary details and notation-specific elements.

4.1. Organisational Context and Presales Process Before BPM Intervention

The focal organisation is a medium-sized IT consulting firm operating in the Polish market, characterised by low BPM maturity and the absence of prior formal process management initiatives. Before the intervention, the presales process evolved organically in response to business growth and increasing client demand. As a result, presales activities were essentially ad hoc, undocumented, and highly dependent on individual experience rather than shared routines or formally defined roles. Presales work spanned from initial client contact to proposal submission, but lacked a consistent structure. Information related to opportunities was fragmented across personal email inboxes, spreadsheets, and private folders. The organisation did not use a centralised customer relationship management system, nor did it systematically capture data on presales performance. Consequently, collaboration across Sales, Technical teams, Finance, and the recently acquired Delivery Center was inconsistent and reactive. Process drift was typical, as actual practices diverged from intended ways of working due to time pressure, individual preferences, and staff availability. A key structural challenge was the Delivery Center's limited involvement in presales activities. Although this unit was responsible for solution delivery, it was rarely engaged during proposal preparation. Technical feasibility assessments were therefore often postponed until after contract signing, increasing the risk of misalignment between client expectations and delivery capabilities. Responsibilities

within presales were unclear, and employees frequently assumed informal tasks, resulting in duplicated work, communication gaps, and delays.

Process Owner: no

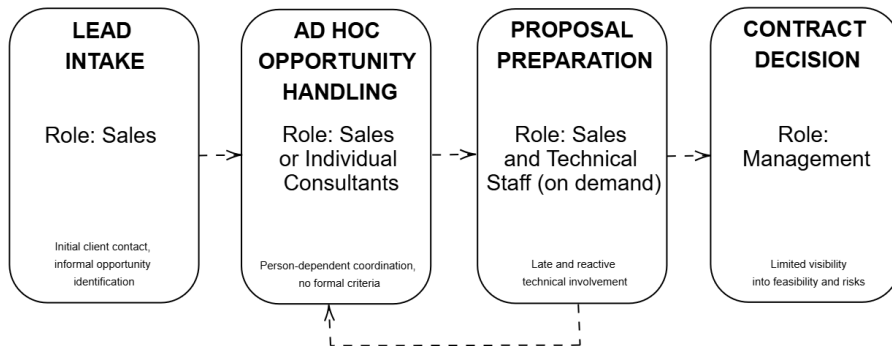


Figure 1. High-level conceptual representation of the presales process *before* the BPM intervention, illustrating ad hoc coordination, late technical involvement, and limited process visibility

Source: own elaboration based on Surdziel (2024).

The organisation lacked structured lead-qualification criteria, standardised documentation, and defined entry and exit conditions across presales stages. Opportunities were pursued opportunistically, regardless of strategic fit or resource availability. Because no key performance indicators were tracked, management had limited visibility into presales effectiveness, bottlenecks, or root causes of lost deals. Overall, the presales process exhibited typical symptoms of low process maturity: weak ownership, siloed coordination, limited transparency, and high vulnerability to process drift (Surdziel, 2024).

4.2. BPM-Based Intervention and Presales Process After Implementation

The presales process was selected as the entry point for BPM intervention due to its strategic importance for revenue generation and widespread dissatisfaction among employees involved in proposal preparation. The intervention followed the BPM lifecycle and combined process modelling, participatory workshops, and incremental organisational changes.

Process discovery began with interviews and cross-departmental workshops, during which the as-is presales process was modelled using BPMN 2.0 in the ARIS platform. For the first time, stakeholders could view the complete end-to-end process, including handovers, decision points, and cross-functional dependencies. This visualisation revealed missing inputs, redundant coordination loops, and the delayed

involvement of technical experts. Value stream mapping highlighted significant rework and waiting times, whereas root cause analysis linked these inefficiencies primarily to unclear responsibilities, inconsistent documentation, and reactive handling of opportunities. Based on this analysis, the presales process was redesigned to introduce greater transparency and shared ownership. A dedicated Presales Department was established to coordinate cross-functional activities, supported by the formal appointment of a Presales and Offers Manager. The redesigned workflow defined explicit entry and exit criteria, introduced a structured lead qualification phase, and mandated early technical feasibility assessment for complex or high-value opportunities. The Delivery Center was formally integrated into the presales function, ensuring that delivery constraints and technical considerations were incorporated into proposals from the outset.

To support learning and monitoring without imposing heavy technological requirements, several lightweight artifacts were introduced. These included a Project Barrier form to capture obstacles encountered during proposal preparation and a Win/Loss Analysis form to document reasons for successful and unsuccessful bids. Although a complete CRM system was still under deployment, a standardised shared repository was implemented to reduce data fragmentation and improve information consistency. Monthly review meetings were established to discuss ongoing opportunities, reflect on outcomes, and monitor emerging performance indicators. The intervention also addressed organisational dynamics associated with change. Initial resistance to formalisation was mitigated through participatory workshops, transparent communication, and visible executive support. Over time, employees began to perceive the redesigned process as a mechanism for reducing ambiguity and rework rather than as a form of bureaucratic control. Clarifying roles and responsibilities, combined with early cross-functional collaboration, reduced late-stage surprises and strengthened coordination among Sales, Technical teams, and the Delivery Center.

Process Owner: Presales

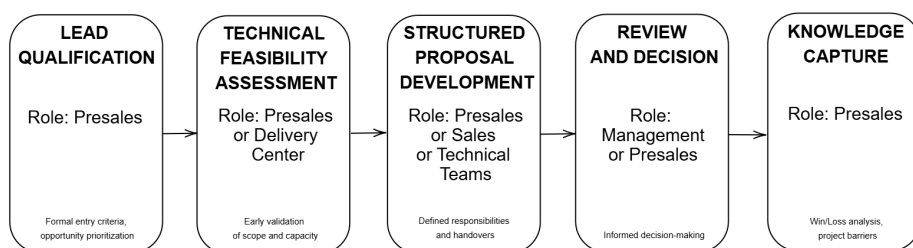


Figure 2. High-level conceptual representation of the presales process *after* the BPM intervention, highlighting defined process ownership, early technical feasibility assessment, and structured coordination

Source: own elaboration based on Surdziel (2024).

As a result, the presales process transitioned from an informal, drift-prone set of practices to a formalised, collaboratively managed workflow. While long-term performance effects require continued observation, early outcomes indicated reduced process drift, clearer ownership, and improved cross-functional alignment, creating a foundation for systematic monitoring and future process improvement (Surdziel, 2024).

5. Results

The BPM-based intervention produced a set of interrelated structural, performance-related, and organisational outcomes. The results are presented across four dimensions. First, formalising the presales process led to clearer ownership and more structured cross-functional coordination. Second, the introduction of fundamental performance indicators enabled the initial quantification of presales effectiveness and improved managerial visibility. Third, lightweight BPM artifacts supported learning and knowledge capture across departments. Finally, the intervention triggered observable cultural dynamics, including reduced resistance to formalisation and the emergence of shared ownership of processes. Together, these results illustrate how early-stage BPM interventions can mitigate process drift and stabilise coordination in a low-maturity SME context.

5.1. Structural and Coordination Outcomes

The BPM-based intervention resulted in clear structural changes that addressed the previously fragmented and informal presales function. Most notably, a dedicated Presales Department was established and assigned explicit responsibility for coordinating presales activities across Sales, Technical, Finance, and the Delivery Center teams. The appointment of a Presales and Offers Manager created a single point of ownership for the presales pipeline, replacing a previously diffuse, person-dependent coordination model. Figures 1 and 2 present high-level conceptual views of the presales process before and after the BPM intervention, abstracted from the detailed BPMN models developed in ARIS to preserve organisational confidentiality (Surdziel, 2024).

A key outcome was the formal integration of the Delivery Center into the early stages of the presales process. Technical experts were now systematically involved in feasibility assessments for complex and high-value opportunities, ensuring that delivery constraints informed proposal preparation from the outset. This structural integration reduced misalignment between sales commitments and delivery capabilities, thereby improving interdepartmental predictability. Beyond structural changes, the intervention created a shared, end-to-end understanding of presales work across departments, reducing the duplication of effort and inconsistent handoffs. The intervention replaced informal handovers and ad hoc coordination with clearly defined

responsibilities and cross-functional collaboration mechanisms, significantly reducing ambiguity in presales work. These structural changes improved alignment between business objectives and process execution by enabling systematic opportunity prioritisation, greater transparency and accountability, and earlier validation of delivery feasibility.

5.2. Performance Indicators and Early Quantitative Results

Prior to the intervention, the organisation did not systematically measure presales performance. As part of the BPM initiative, baseline indicators were established to provide transparency and enable future monitoring. Initial measurements indicated a win rate of approximately 25%, an average response time of 14 days from the initial client inquiry to proposal submission, and an average profit margin of approximately 25%. In addition to the baseline KPIs reported in Table 1, the organisation began routinely tracking operational volume indicators (e.g., proposals submitted) to support ongoing monitoring.

Table 1. Baseline and target KPIs in the presales process.

Key Performance Indicators	Baseline	Target
Win rate	~25%	≥35%
Average response time	~14 days	≤10 days
Profit margin	~25%	≥30%
Complexity index (tracked per stage)	High	Medium–High

Source: own elaboration based on Surdziel (2024).

Based on these baseline values, the organisation defined realistic performance targets aligned with its capacity and strategic objectives. These included increasing the win rate to at least 35%, reducing the average response time to 10 days or less, and maintaining or slightly improving profitability through better opportunity qualification and early feasibility screening. Table 1 summarises the baseline and target values. While the post-implementation observation period was too short to confirm sustained quantitative improvements, early monitoring indicated greater discipline in tracking opportunities and increased managerial visibility into presales performance. Notably, the introduction of KPIs marked a transition from intuition-based decision-making towards evidence-informed management. Establishing fundamental performance indicators reinforced process discipline and reduced process drift by making deviations and delays visible to both managers and operational staff.

5.3. Learning, Feedback, and Knowledge Capture

Among the lightweight BPM artifacts introduced, the Project Barrier and Win/Loss Analysis forms proved particularly instrumental in sustaining change by enabling structured learning and feedback. The Project Barrier form and the Win/Loss Analysis form enabled systematic reflection on presales outcomes, capturing recurring challenges such as delayed internal estimates, unclear client requirements, and slow response times. The early use of these artifacts revealed patterns that had previously remained implicit. For example, analyses of lost opportunities highlighted that prolonged response times were a contributing factor in several cases. By documenting such insights, the organisation began to accumulate actionable knowledge that could be reused across future bids, laying the groundwork for continuous improvement. These feedback mechanisms also supported cross-functional dialogue, as insights from sales, technical, and delivery perspectives were discussed collectively during review meetings. As a result, learning became a shared responsibility rather than an individual or informal activity.

5.4. Cultural and Organisational Dynamics

Beyond structural and performance-related outcomes, the intervention triggered observable cultural and behavioural changes. Initial resistance to formalisation—particularly among staff accustomed to flexible, informal working practices—gradually diminished as the benefits of clearer roles and reduced rework became apparent. Employees reported greater clarity regarding responsibilities and decision-making rights, reducing frustration and improving cooperation. Cross-functional trust improved as early technical involvement reduced last-minute surprises and re-negotiations. Sales personnel valued more reliable technical input, while engineers appreciated being engaged before commitments were made to clients. Over time, these interactions fostered a shared understanding of the presales process as a collective endeavour rather than a set of isolated tasks. Taken together, these dynamics indicate the emergence of shared process ownership, in which formal structures, basic metrics, and participatory routines support both coordination and adaptability. Although the long-term stability of these changes requires further observation, the results demonstrate that even in low-maturity SME contexts, lightweight BPM interventions can generate meaningful organisational and cultural improvements. These dynamics demonstrate how formalisation in a low-maturity SME can trigger an adaptive process in which initial resistance gives way to coordination, learning, and shared process ownership, directly shaping the observed outcomes.

6. Discussion

The intervention transformed an informal, fragmented presales approach into a structured, cross-functional process governed by clearly defined roles, supported by data, and aligned with business goals. In the context of low-maturity SMEs, this confirms that targeted, lightweight BPM practices can enable meaningful improvements without extensive tooling (Dumas et al., 2013; Harmon, 2019). Observed outcomes are consistent with early-stage maturity improvements: ownership, coordination mechanisms, and basic measurement precede the feasibility of advanced analytics (Di Ciccio, 2024). The case also illustrates that change management provides a useful scaffold for sequencing actions and anchoring new behaviours (Kotter, 2012). The findings also align with Abdelaziz and Khalil (2023), who highlight that presales success depends on early involvement across multiple functions, and with De Sordi (2023), who underscores the interplay among people, processes, and technology in driving performance. Using ARIS for BPMN modelling (Davis & Brabander, 2007) made process discussions tangible, allowing stakeholders to compare perceptions and agree on changes. The case demonstrates that even in SMEs, accessible BPM tools can facilitate collaboration and learning when paired with strong facilitation.

In response to MRQ, the study confirms that formalising a previously informal presales process is feasible even with limited analytical infrastructure. Basic BPM lifecycle activities, such as process identification, as-is modelling, redesign, and monitoring, were sufficient to establish ownership, structure, and a shared understanding. These steps did not require advanced technologies but were grounded in practical, participatory methods. The project uncovered organisational dynamics that included initial resistance, adaptation over time, and the gradual development of cross-functional trust. The establishment of a dedicated Presales Department and the integration of the Delivery Center helped break down silos and clarify responsibilities, making process ownership more visible and actionable. DRQ1 highlighted the effectiveness of targeted artifacts: the redesigned BPMN model, structured forms for proposal feedback and barrier tracking, and an initial KPI framework. These lightweight tools enabled reflection, learning, and the development of a rudimentary data culture—key enablers of sustaining change and mitigating process drift. Regarding DRQ2, the creation of the Presales & Offers Manager role and the introduction of a CRM system provided critical governance mechanisms that improved response times, proposal quality, and strategic alignment. Although these measures are still in early deployment, they represent concrete steps toward better integrating business goals with day-to-day process execution. Although the intervention produced immediate structural and cultural benefits, the long-term effects remain to be assessed. KPI tracking began only recently, and indicators such as the win rate, the proposal turnaround time, and profitability require further observation to confirm a sustained impact. As such, a longitudinal follow-up would be valuable for evaluating the stability of changes, measuring performance evolution, and assessing organisational learning.

The results should be interpreted with consideration for the single-case scope and the early stage of KPI tracking. Contextual factors, such as leadership engagement, acquisition-related integration needs, and a relatively flat organisational structure, shaped both the challenges and the outcomes. Nevertheless, the combination of structural changes (a dedicated Presales function), integration mechanisms (early Delivery involvement), and minimal artifacts (BPMN model, Win/Loss and barrier forms, baseline KPIs) appears to have stabilised presales work and initiated a cultural alignment around shared ownership and continuous improvement. This suggests a pragmatic pathway for SMEs to build process capability and readiness for future digital tools once data and routines are in place.

6.1. Research Limitations

This study is subject to several limitations that should be considered when interpreting the findings. First, the research employs a single-case explanatory design, limiting statistical generalisability. The results are therefore not intended to represent all SMEs or presales processes, but rather to provide analytical generalisation by illustrating mechanisms through which BPM interventions can influence organisational dynamics in low-maturity contexts. The findings are context-dependent. The focal organisation operates in the IT consulting sector and has recently undergone structural changes related to the acquisition of a Delivery Center. Factors such as leadership engagement, organisational culture, and acquisition-driven integration needs shaped both the challenges encountered and the outcomes observed. Similar interventions in other industries or organisational settings may therefore unfold differently. The post-implementation observation period was relatively short. While early structural, behavioural and coordination-related effects were clearly observable, long-term performance impacts—including sustained improvements in win rates, response times, and profitability—require longitudinal monitoring. The KPI framework introduced during the study represents an important foundation, but its full evaluative potential has yet to be realised. Data collection relied primarily on interviews, workshops, and practitioner-reported observations. Although triangulation was applied and multiple stakeholder perspectives were included, the qualitative nature of the evidence introduces a risk of subjective interpretation. Future studies could complement such designs with multi-case comparisons or quantitative analyses once more mature process data become available.

6.2. Managerial Implications

The findings of this study offer several actionable insights for managers in SMEs seeking to formalise drift-prone processes in low BPM maturity environments. First, the case demonstrates that establishing clear process ownership is a critical early intervention. The introduction of a dedicated Presales function and a single

accountable role significantly reduced ambiguity and improved coordination across departments. Prior BPM research similarly emphasises that role clarity and ownership precede successful process standardisation and performance improvement, particularly in low-maturity environments (Dumas et al., 2013; Harmon, 2019; Jeston & Nelis, 2008). The results highlight the value of lightweight BPM artifacts over advanced technologies in early transformation stages. Simple tools—such as BPMN models, basic KPIs, and structured Win/Loss or barrier-tracking forms—proved sufficient to stabilise coordination, support learning, and reduce process drift. This finding aligns with SME-focused BPM studies showing that excessive technological ambition can hinder adoption, whereas minimal, purpose-driven artifacts foster engagement and sustainability (Okręglicka et al., 2015; Er & Nurmadewi, 2021; Gabryelczyk et al., 2022). Managers should prioritise early cross-functional involvement, particularly from delivery or technical units, in customer-facing processes such as presales. The early integration of the Delivery Center reduced late-stage surprises and improved feasibility alignment, reinforcing prior findings that presales effectiveness depends on timely collaboration between sales and technical expertise (Abdelaziz & Khalil, 2023; De Sordi, 2023). The case illustrates that formalisation does not necessarily increase bureaucracy when implemented incrementally and in a participatory manner. Initial resistance diminished as employees experienced reductions in rework and uncertainty, supporting the view that BPM initiatives succeed when they balance structure with adaptability and emphasise learning rather than control (Harmon, 2019; Jurczuk, 2021). For practitioners, this suggests that BPM adoption in SMEs should be framed as a means of enabling coordination and shared ownership, rather than as a compliance-driven exercise.

7. Conclusions

This explanatory case study demonstrated how a medium-sized IT consulting firm formalised a drift-prone presales process using BPM principles in a low process maturity context. The intervention established clearer ownership through a dedicated Presales function, improved role clarity, and enabled the earlier involvement of technical expertise in proposal development. Together with lightweight artifacts (e.g., Project Barrier and Win/Loss Analysis forms) and basic KPI tracking, these changes reduced ambiguity, supported coordination across functions, and fostered shared process ownership.

The study contributes to BPM-in-SMEs research by providing an organisationally grounded explanation of how early-stage BPM formalisation can mitigate process drift and support capability building under resource constraints. For practitioners, the case suggests that incremental formalisation—focused on ownership, handovers, and simple measurement—can yield meaningful benefits without requiring advanced BPM technologies. The findings should be interpreted in light of the

study's limitations. As a single-case investigation conducted over a limited time horizon, the results emphasise explanatory depth rather than broad generalisation, and long-term performance effects require further observation. Future research could extend this work through longitudinal tracking and comparative case studies across industries, regions, and governance structures. Such studies could also examine how SMEs progress from fundamental process formalisation and data capture towards the adoption of more advanced BPM technologies as process maturity increases.

Acknowledgement

This research project was partly supported by the programme "Excellence initiative—research university" granted to the AGH University of Krakow.

References

1. Abdelaziz, M., & Khalil, T. (2023). Exploring the presales process in high-tech companies. *IEEE Engineering Management Review*, 51, 51–58. DOI: [10.1109/EMR.2023.3284348](https://doi.org/10.1109/EMR.2023.3284348).
2. Bartelheimer, C., Wolf, V., & Beverungen, D. (2023). Workarounds as generative mechanisms for bottom-up process innovation. *Information Systems Journal*, 33(2), 350–378. DOI: [10.1111/isj.12435](https://doi.org/10.1111/isj.12435).
3. Benner, M.J., & Tushman, M. L. (2003). Exploitation, exploration, and process management: The productivity dilemma revisited. *Academy of Management Review*, 28(2), 238–256. DOI: [10.5465/amr.2003.9416096](https://doi.org/10.5465/amr.2003.9416096).
4. Brzychczy, E., Kluza, K., & Gdowska, K. (2024). Exploring hybrid modelling of industrial process – mining use case. In *BPM Proceedings* (pp. 302–313). Springer Nature Switzerland. DOI: [10.1007/978-3-031-50974-2_23](https://doi.org/10.1007/978-3-031-50974-2_23).
5. Davis, R., & Brabander, E. (2007). *ARIS Design Platform: Getting started with BPM*. Springer-Verlag.
6. De Sordi, J. (2023). *Management by Business Process: A Managerial Perspective of People, Process, and Technology*. Palgrave Macmillan. DOI: [10.1007/978-3-031-11637-7](https://doi.org/10.1007/978-3-031-11637-7).
7. Di Ciccio, C., Fdhila, W., Agostinelli, S., Amyot, D., Leopold, H., Krčál, M., Malinova Mandelburger, M., Polančič, G., Tomičić-Pupek, K., Katarzyna, G., Grisold, T., Sliž, P., Beerepoot, I., Gabryelczyk, R., & Plattfaut, R. (2024). *Business process management: Blockchain, robotic process automation, Central and Eastern European, educators and industry forum*. In *BPM 2024 Blockchain, RPA, CEE, Educators and Industry Forum, Krakow, Poland, September 1–6, 2024, Proceedings*. Springer Nature Switzerland. DOI: [10.1007/978-3-031-70445-1](https://doi.org/10.1007/978-3-031-70445-1).
8. Dumas, M., La Rosa, M., Mendling, J., & Reijers, H.A. (2013). *Fundamentals of Business Process Management*. Springer-Verlag. DOI: [10.1007/978-3-642-33143-5](https://doi.org/10.1007/978-3-642-33143-5).
9. Er, M., & Nurmawati, D. (2021). Analysis of business process management capability and information technology in small and medium enterprises in the garment industry (multiple case studies in East Java, Indonesia). *Electronic Journal of Information Systems in Developing Countries*, 87(1), e12154. DOI: [10.1002/isd2.12154](https://doi.org/10.1002/isd2.12154).

10. Gabryelczyk, R., Brzychczy, E., Gdowska, K., & Kluza, K. (2022). Business process management in CEE countries: A literature-based research landscape. In *Proceedings* (pp. 279–294). Springer International Publishing. DOI: [10.1007/978-3-031-16168-1_18](https://doi.org/10.1007/978-3-031-16168-1_18).
11. Harmon, P. (2019). *Business Process Change: A Business Process Management Guide for Managers and Process Professionals* (4th ed.). Morgan Kaufmann.
12. Jeston, J., & Nelis, J. (2008). *Business Process Management: Practical Guidelines to Successful Implementations* (2nd ed.). Butterworth-Heinemann.
13. Jurczuk, A. (2021). Barriers to implementation of business process governance mechanisms. *Engineering Management in Production and Services*, 13(4), 22–38. DOI: [10.2478/emj-2021-0029](https://doi.org/10.2478/emj-2021-0029).
14. Kotter, J.P. (2012). *Leading Change*. Harvard Business Press.
15. Okręglička, M., Mynarzová, M., & Kaňa, R. (2015). Business process maturity in small and medium-sized enterprises. *Polish Journal of Management Studies*, 12(1), 121–131. URL: <https://pjms.zim.pcz.pl/article/115894/en> (09.09.2025).
16. Ozkan, B., Koops, M., Türetken, O., & Reijers, H.A. (2024). The Influence of Business Process Management System Implementation on an Organization's Process Orientation: A Case Study of a Financial Service Provider. *Information Systems Management*, 41(4), 377–398. DOI: [10.1080/10580530.2023.2286980](https://doi.org/10.1080/10580530.2023.2286980).
17. Rosemann, M., vom Brocke, J., Van Looy, A., & Santoro, F. (2024). Business process management in the age of AI – three essential drifts. *Information Systems and e-Business Management*, 22, 415–429. DOI: [10.1007/s10257-024-00689-9](https://doi.org/10.1007/s10257-024-00689-9).
18. Sliż, P., Berniak-Woźny, J., Siciński, J., & Balbuza-Kudzian, M. (2024). Dojrzałość procesowa organizacji w Polsce. *Raport 2024*. DOI: [10.13140/RG.2.2.33481.56169](https://doi.org/10.13140/RG.2.2.33481.56169).
19. Surdział, M. (2024). *Optymalizacja procesów biznesowych oparta na danych w przedsiębiorstwie z branży IT*. Bachelor's Thesis. AGH University of Krakow, Faculty of Management, Krakow, Poland.
20. Yin, R.K. (2018). *Case Study Research and Applications: Design and Methods* (6th ed.). SAGE Publications.