



**Organizational elements involved in the alignment between strategic planning and BPM  
from the theory and perspective of Latin American professionals.**

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**Summary**

Today, the practice of aligning strategic planning with business process management (BPM) is the first and most important phase in organizations of different types and sizes that are willing to manage their growth in an agile way; in addition, to be prepared for the challenges of innovative processes with the digital transformation. This led us to ask ourselves the question: What are those organizational elements that intervene in the alignment of strategic planning with BPM? Thus began the purpose of this study, to identify those organizational elements involved in this alignment, through a methodology with an exploratory - analytical approach from a qualitative - naturalistic route, where the theoretical was enriched with the contribution of the experience of professionals from Latin America. As a result, seven organizational elements were identified, grouped according to their characteristics in two dimensions. This would allow organizations to have a broader alignment approach, providing them with an integral vision of their operations to

sustainably prolong their years of growth and maturity, and strengthen their organizational culture from an innovative and transformative environment.

Keywords: digital transformation; business process management; BPM; alignment between planning and management.

## **Introduction**

The constant changes that arise in the world generated by demand and social commitment force private, public, social organizations, and also higher education institutions to opt for agile management models that are the basis for the implementation of a digital transformation process.

Current management models place the alignment between planning and management of business processes as a starting point to give value and agility to the organization. Agility when integrated with technology allows you to face new challenges and manage change to avoid the generation of chaos. The aforementioned chaos could be caused by organizational structures that make their strategic strength the functional hierarchy of their operations, because management is disconnected or poorly connected with their strategy.

Currently, the models of excellence in business process management are not only oriented to the execution of improvements and control of business processes (Trilles, n.d.), they also focus on the strategic alignment of their management; adopting new policies and increasing quality levels (Barrera et al., 2019). BPM is one of the methodologies that is characterized in proposing a life cycle that begins with a phase of understanding the strategies and objectives of the organization to be aligned with the management of its business processes, in order to guarantee a convincing value proposition for customers (ABPMP, 2019).

Therefore, the question arises: What are the organizational elements involved in the alignment between strategic planning and business process management?

With the intention of clearing this question, it is proposed to identify the organizational elements involved in the alignment between strategic planning and business process management, through a bibliographic analysis and the experience of Latin American professionals. This in order to provide organizations with a guide to build their own models of alienation according to their nature, criteria and horizons of fulfillment of their goals; In addition to favoring the change of organizational culture by promoting integral and agile thinking in management, whose result is to improve their maturity levels to face transformative challenges.

## **Theoretical context**

To better understand the paradigm approach of aligning objectives and strategies with business processes, we start from the definitions and characteristics of strategic planning; business process management; research contributions on this alignment paradigm; the first phase of the BPM lifecycle and the emerging categories identified in this document.

### *Strategic planning as a dimension of BPM alignment*

Thus, Kabeyi (2019) states that strategic planning consists of long-term planning where its purpose is established, that is, the achievements that are proposed to be achieved at the end of a certain time; and, a second that defines the strategies, objectives, priorities, processes, activities and committing resources to achieve the purpose. However, Condarco (2009) in his research reveals that even today there are organizations that first establish their strategies or processes before establishing their purposes.

With respect to strategies Tapera (2014) identifies four levels; strategies that relate to the so-called corporate business; the strategies of the business units that relate to their organizational structure; strategies at the functional level that relates to the value chain and processes; and, operational strategies that refer to how to organize each element of the business.

At this point it is valid to add what was expressed by the informants of this research in reference to this dimension of alignment, which mention that an organization presents an agile planning, when it formulates its long, medium and short-term objectives from an approach that contextualizes all the environments of the organization and feeding back from an analysis of the results of each previously aligned process. and their strategies translate these objectives to be included in the alignment of their BPM; allowing to strengthen an organizational culture that manages risks and thus minimize uncertainty in management by knowing and anticipating the barriers that the process could face.

### *Business Process Management (BPM)*

Regarding the management of business processes, Martínez Martínez & Cegarra Navarro (2014) groups the processes into strategic ones that are related to the first level of so-called corporate strategies and the operational and support processes that are related to the other three levels of strategies. In turn, Reijers (2021) defines a group of so-called business processes that are not only related to the last three levels of strategies mentioned in the previous paragraph, but also cover different organizational limits such as locations in relation to geography, products and services that are generated, organic structures, specialties or functions or levels of management, among others.

Likewise, in the business process group it is essential to understand the roles of the people involved, the workflow, as well as the technologies involved in its execution (Reijers, 2021); adding what is mentioned by Machado Mateos & Rodríguez Sánchez (2020) who emphasizes in addition to what has already been indicated, that this group of processes is where staff act together to achieve integration and results.

Among the organizational elements that emerge in this research within the management of business processes is the organic structure, According to Machado Mateos & Rodríguez Sánchez (2020) mentions, that organizations must be structured following a series of criteria, such as, production processes, their functions, their customers, geographical areas, their products, services they generate and their personnel. Organizations increase in size and complexity and find it difficult to centrally operate (Martínez Martínez & Cegarra Navarro, 2014). For these reasons, Bonatti (2020) argues that types of structure such as matrix arise as a result of responding to these more complex environments. It complements what was said by these authors, in that the design of a matrix structure or its variants is optimized by being included within an alignment of strategic planning with the management of business processes.

Another element that emerges are the indicators for the efficient performance of agile and quality management. According to Machado Mateos & Rodríguez Sánchez (2020) they mention that the indicators are metrics that are designed from three fundamental criteria such as: effectiveness to achieve the proposed goals, efficiency to achieve the goals but optimally and effectiveness. Bitkowska (2018) argues in one of her investigations that these indicators should be managed by a centralized and separate organizational unit, created to offer specialized services, support in the field of process management and provide recommendations and guidelines for the operation of processes with the aim of raising the level of efficiency and effectiveness of the

process initiatives implemented. Harmon & Wolf (2012) complements that this type of offices or units can coordinate all the work of the process within the organization, monitor the performance of the process or undertake projects and provide support for the efforts of change or transformation of the organization.

Consequently, BPM is considered a holistic discipline because it focuses on the performance of the organization through the management of business processes (Suša Vugec et al., 2018). Likewise, Zelt et al. (2019) propose to move BPM away from the assumption that it is a tailor-made approach. Similarly, Dumas et al. (2018) considers BPM to more than one science also an art in management that facilitates communication between stakeholders and stakeholders, where results are consistent when taking advantage of opportunities for improvement.

### *The BPM methodology*

In the research conducted by McCormack & Johnson (2020) reveals how BPM-oriented organizations tend to outperform organizations without such an approach, because they balance their functional and horizontal structure with process management, without leaving aside strategic decisions and the scope of the organization's objectives.

For their part, Fischer et al. (2020) describe in their research five companies that successfully addressed digital transformation by aligning their structures, operations, strategies and information technologies through BPM. Therefore, Sebastián et al. (2017) argue that, although BPM has contributed to companies sustainably adapting their organizational structures and operations, the impact of digital transformation has been mainly limited to controlled business scenarios.

Likewise, Granda & Bermeo (2022) argue in their applied research that a correct alignment between the objectives and processes of organizations allows the latter to improve in parameters of eliminating or reducing waste, duplication of tasks, over-processing and waiting time.

It should be noted that the authors frequently mention about organic and functional structures, this could be because one of the concerns of organizations is that increasing in size also increases its complexity so they always look for a structure that allows to be flexible but orderly for expansion. Because of this, Martinez Martinez & Cegarra Navarro (2014) argues that a horizontal structure divides the work in a flexible and agile way, in addition to specializing the

functional. On the other hand, Bonatti (2020) mentions the stable and variable matrix structure, which responds to more complex environments, by facing changes in an agile way, but with a high cost in its implementation; in addition to the stress faced by the organization caused by the cultural change in its beginnings.

Hence, organizations apply the BPM approach as a strategy to prolong the years of growth they experience by achieving their purposes; because it facilitates the execution of changes in an agile way, without affecting quality and above all keeping their management focused on their strategies and goals (Barrera et al., 2019). In addition, Fischer et al. (2020) highlight that this approach fosters within organizations, innovation and creativity processes, which ultimately provide an overview of the organizational resources and competencies that are assigned to the execution of business processes.

### *The BPM Lifecycle*

In sum, we can frame the present context in the BPM life cycle (Figure 1). The first phase of the cycle tries to guarantee a comprehensive approach by starting from the understanding of the strategies and goals set by the organization, and its alignment with its processes, through organizational limits (ABPMP, 2019). Similarly, Fischer et al. (2020) describe this cycle as a management framework that is based on six dimensions: strategic alignment, governance, methods, IT, people and culture. In turn, Rentes et al. (2019) argue that alignment is a main factor in the life cycle, considering BPM as an effort that increases to achieve the objectives set.

### **Figure 1**

#### *The phases of the BPM lifecycle*



*Note.* ABPMP (2019)

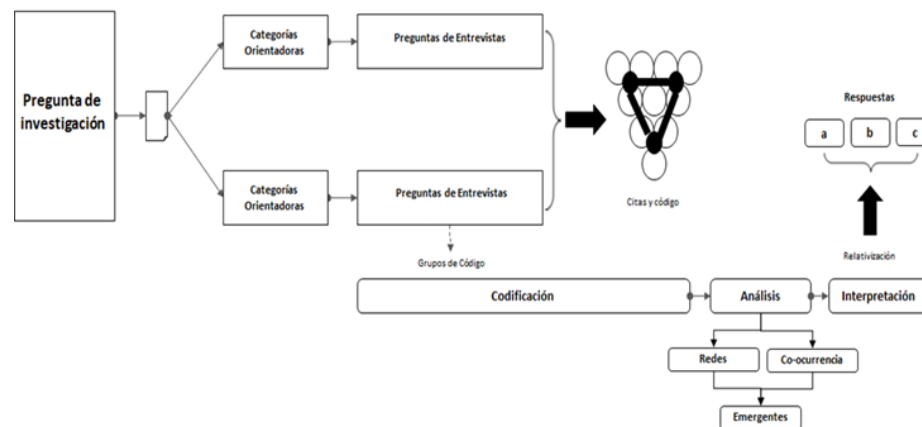
### **Methodology**

Since the data obtained from the theoretical are greatly enriched by the experiential experience and the comparative analysis of each route (Brown et al. 2020) and (Hernández et al.

2020), this research has an exploratory - analytical approach from the basis of a qualitative - naturalistic route in the managerial sciences (Figure 2), adapted from the proposal of González et al. (2022).

**Figure 2**

*Outline of the qualitative – naturalistic research path*



*Note:* Adapted from *Qualitative Research Route – Naturalist: An alternative for managerial studies* (p. 338), by González, et al, 2022, Journal of Social Sciences.

The sample was obtained by the non-probabilistic method for convenience due to the difficulty presented when accessing professionals with a focus in the field of BPM. The number of informants in the sample was based on the position of Nielsen (2000) and Robles (2011) who maintain that about 85% of the research objective is obtained from the responses of a number between five to fifteen informants and Galeano (2020) adds that exceeding this interval of informants could fall into a decrease in the scope of said objective.

For these reasons, eight (8) professionals, called informants, who had profiles and experience for the purposes of the topics of this study, were selected, there was equity with respect to gender; and, in addition, being from different Latin American countries, a broader perspective of the subject investigated was obtained.

The eight informants who participated were, three from Peru members of the Association of BPM Professionals (ABPMP for its acronym in English); a director of institutional planning at a university in Ecuador; a quality assurance analyst from a university in Ecuador and member of

ABPMP; A PhD in quality assurance from Colombia; and, two professionals with experience in quality with emphasis on BPM from Chile and Ecuador.

For data collection, a semi-structured interview was designed and used for the eight professionals. The analysis of the data obtained was carried out with the help of the use of the computer tool Atlas.ti.

In principle, two guiding categories were established: (1) strategic planning and (2) process management, these guided the postulates, statements, expressions and approaches that various authors expose in the theoretical context and the approach of the interview to professionals. The questions posed to these professionals were framed from their point of view and experience about the importance, benefits and elements of an efficient alignment of strategic planning and business process management.

After which, and once the interviews with the informants were completed, their answers were thoroughly examined for codification and standardization (Figure 3). As expressed by González et al., (2022) in hermeneutic triangulation the meanings were emerging throughout the codification, and these elements were eventually reintegrated as a single structure, which allowed to deepen the information and give it a due meaning.

After coding, an in-depth analysis of each code and the quotations made by the informants was carried out. First, the co-occurrence between the codes and the documents was analyzed, in figure 4 the relationship of the codes and the documents according to their rooting and density is observed, and in table 1 we find the relative frequencies of each column in relation to the informant and the codes, and in relation to the entire table, This allowed us to find temporal and spatial dimensions related to the study.

After that, the semantic network was generated. According to González et al. (2022) describes the semantic network as a schematic representation where the codes and the hermeneutic triangulation obtained are shown by means of a graph. For this reason, Figure 5 shows the systematic organization of the resulting codes and their coherent interrelationship between each of them; This analysis, apart from giving a broader perspective of how each code was related, allowed us to observe how each of the codes is linked and interacts between each of them and it can also be noted that many of them converge in the efficient performance code.

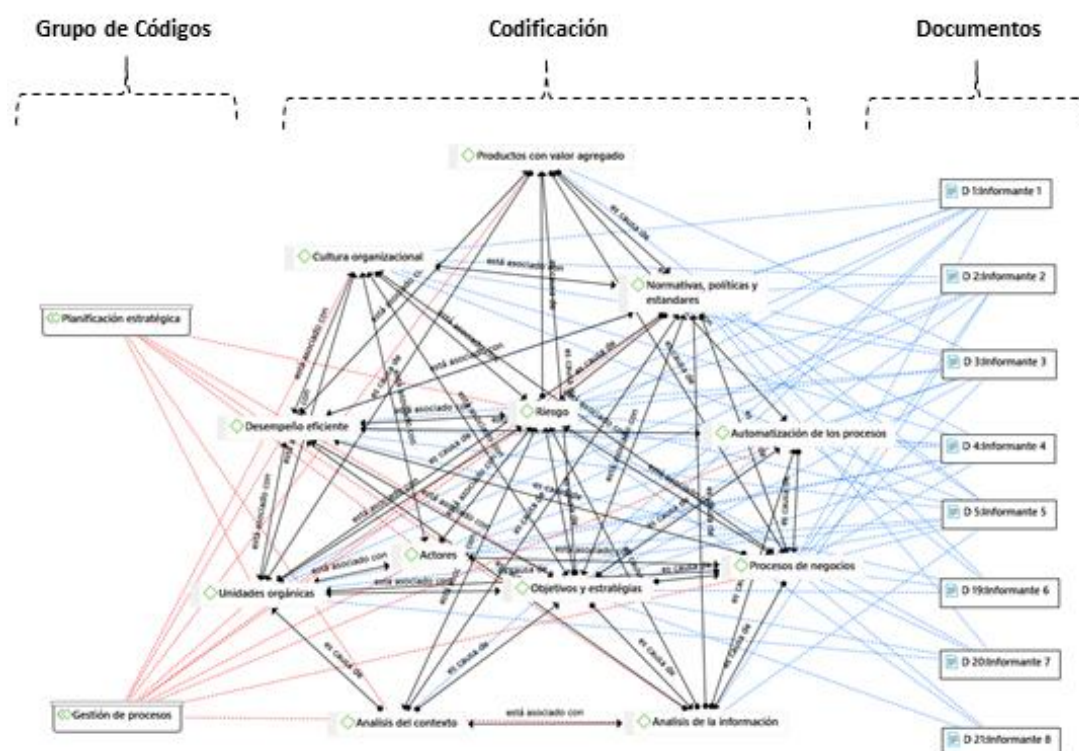
Finally, emerging categories were identified. According to González et al. (2022), defines the emerging category as the analysis that reconstructs the study, in order to reveal the



fundamental aspects according to each analysis carried out. This was done by calculating the emergence index (I.E.) that was obtained by adding the rooting values with the density of each code, allowing to obtain those extraordinary codes (I.E. > X), where the equis is the arithmetic mean of the values of the column I.E. which in this case is sixteen (X = 16). In Table 2 we can see the categories that emerged from the study and in Figure 6 the semantic network of the six codes that determined the emerging categories was generated for a better analysis.

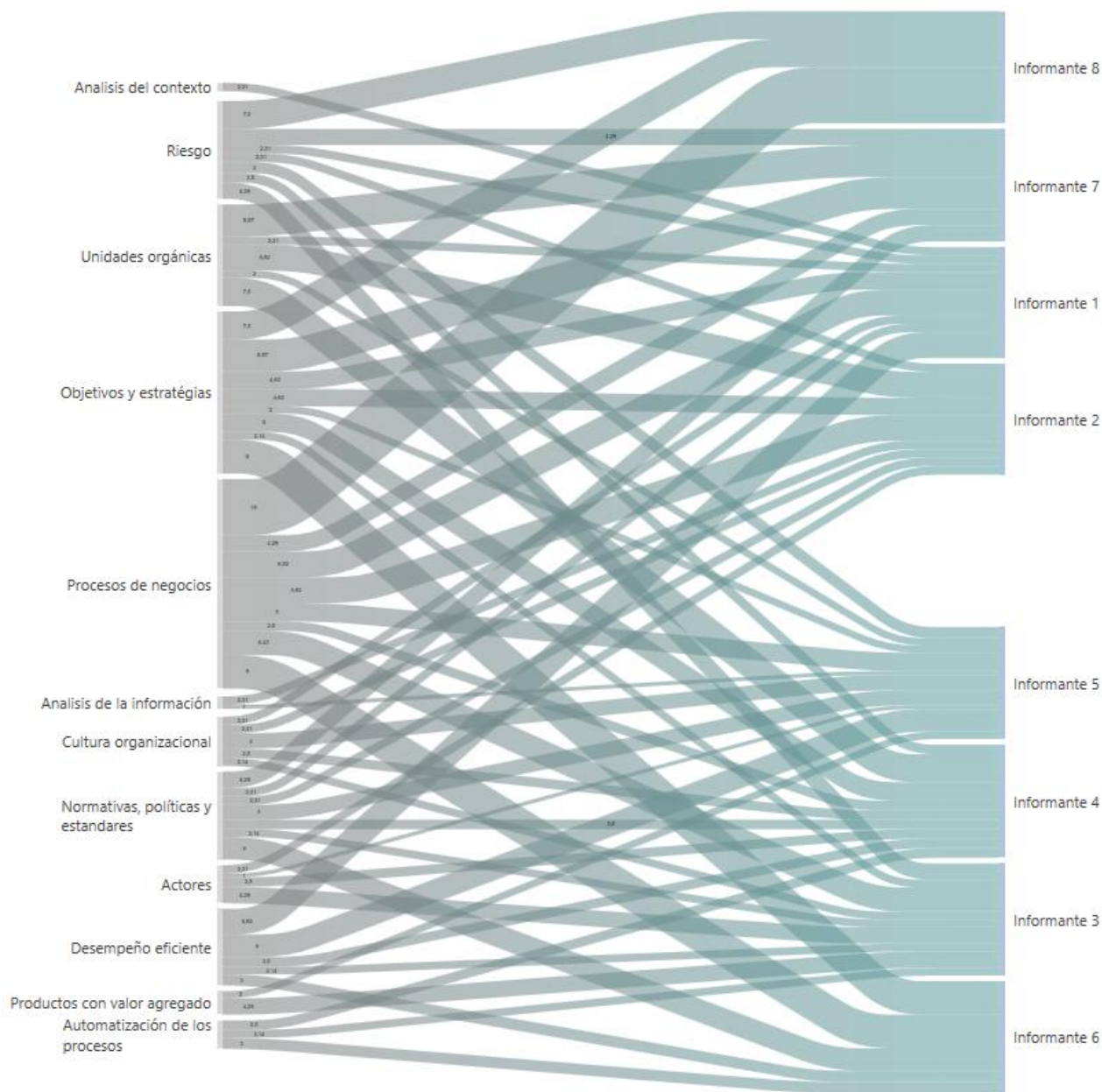
**Figure 3**

*Codification of informants' expressions*



**Figure 4**

*Sankey diagram of the co-occurrence of Codes and informants*



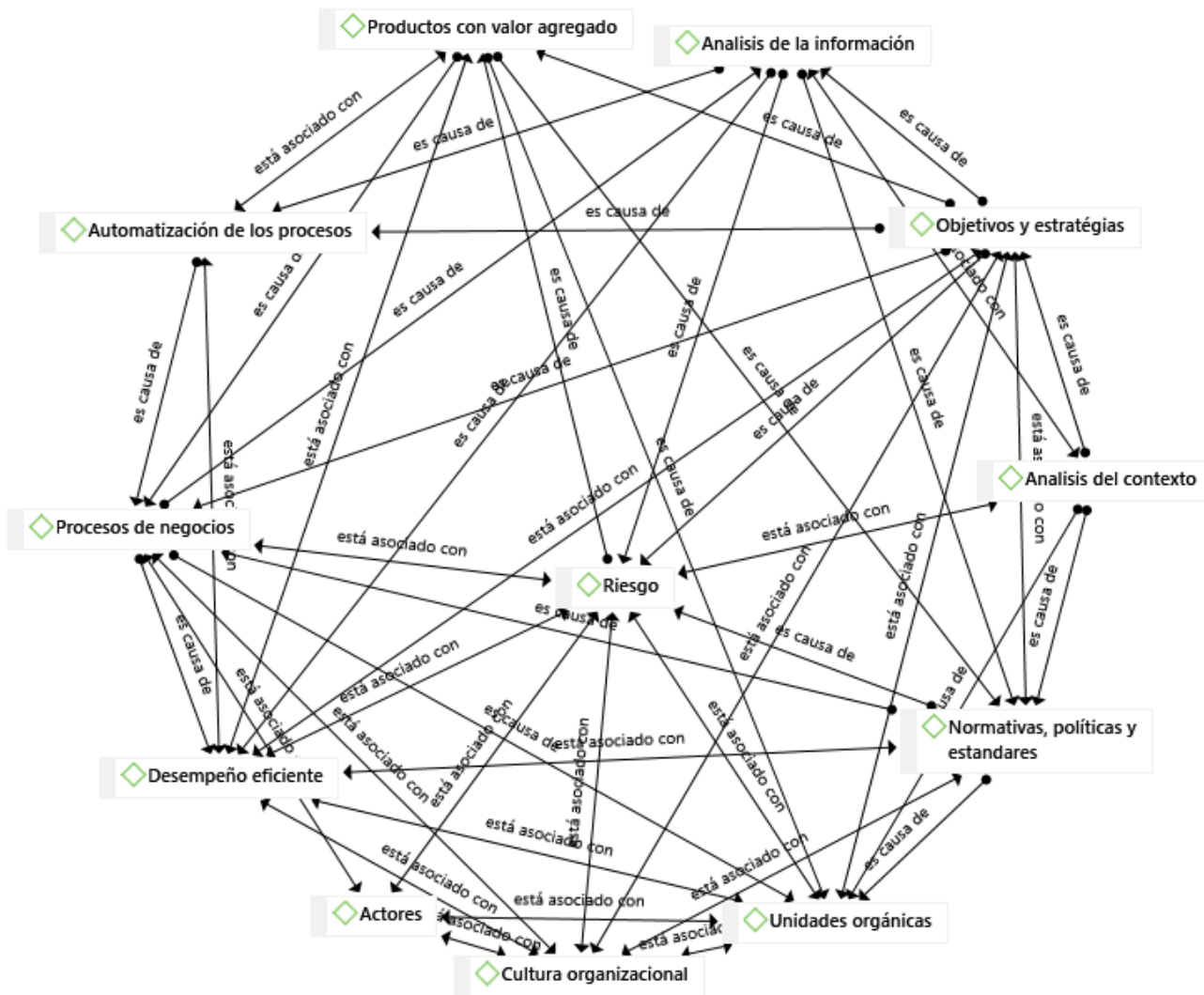
**Table 1**

*Relative frequency of co-occurrence of Codes and informants*

Code	Informante1 Gr=6		Informant 2Gr=4		Informant 3Gr=6		Informant 4Gr=4		Informant 5Gr=12		Informant 6Gr=8		Informant 7Gr=7		Informant 8Gr=4		Total	
	Row	Board	Row	Board	Row	Board	Row	Board	Row	Board	Row	Board	Row	Board	Row	Board	Row	Board
Actors Gr=5	0,00%	0,00%	22,86%	0,96%	42,46%	1,79%	24,77%	1,04%	9,91%	0,42%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	100,00%	4,21%
Analysis of information Gr=2	0,00%	0,00%	69,77%	0,96%	0,00%	0,00%	0,00%	0,00%	30,23%	0,42%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	100,00%	1,38%
Context analysis Gr=1	100,00%	0,96%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	100,00%	0,96%
Process automation Gr=3	0,00%	0,00%	0,00%	0,00%	28,04%	0,89%	32,71%	1,04%	0,00%	0,00%	39,25%	1,25%	0,00%	0,00%	0,00%	0,00%	100,00%	3,18%
Organizational culture Gr=8	17,41%	0,96%	17,41%	0,96%	16,16%	0,89%	18,86%	1,04%	30,17%	1,67%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	100,00%	5,52%
Efficient performance Gr=12	33,66%	2,89%	0,00%	0,00%	10,42%	0,89%	12,16%	1,04%	29,17%	2,50%	14,59%	1,25%	0,00%	0,00%	0,00%	0,00%	100,00%	8,57%
Regulations, policies and standards Gr=11	9,80%	0,96%	9,80%	0,96%	9,10%	0,89%	10,62%	1,04%	16,99%	1,67%	25,48%	2,50%	18,20%	1,79%	0,00%	0,00%	100,00%	9,81%
Objectives and strategies Gr=15	10,62%	1,92%	10,62%	1,92%	4,93%	0,89%	11,51%	2,08%	4,60%	0,83%	20,72%	3,75%	19,73%	3,57%	17,26%	3,13%	100,00%	18,10%
Business Processes Gr=21	12,35%	2,89%	12,35%	2,89%	11,47%	2,68%	4,46%	1,04%	8,92%	2,08%	16,05%	3,75%	7,64%	1,79%	26,76%	6,25%	100,00%	23,36%
Value-added products Gr=4	0,00%	0,00%	0,00%	0,00%	68,18%	1,79%	0,00%	0,00%	31,82%	0,83%	0,00%	0,00%	0,00%	0,00%	0,00%	0,00%	100,00%	2,62%
Risk Gr=10	8,81%	0,96%	8,81%	0,96%	16,37%	1,79%	9,55%	1,04%	11,46%	1,25%	0,00%	0,00%	16,37%	1,79%	28,64%	3,13%	100,00%	10,91%
Organic units Gr=11	8,45%	0,96%	25,36%	2,89%	0,00%	0,00%	27,47%	3,13%	7,33%	0,83%	0,00%	0,00%	31,40%	3,57%	0,00%	0,00%	100,00%	11,38%
<b>Total</b>	12,50%	12,50%	12,50%	12,50%	12,50%	12,50%	12,50%	12,50%	12,50%	12,50%	12,50%	12,50%	12,50%	12,50%	12,50%	12,50%	100,00%	100,00%

Figure 5

Semantic network of the alienation paradigm of strategic planning and business process management



**Table 2**

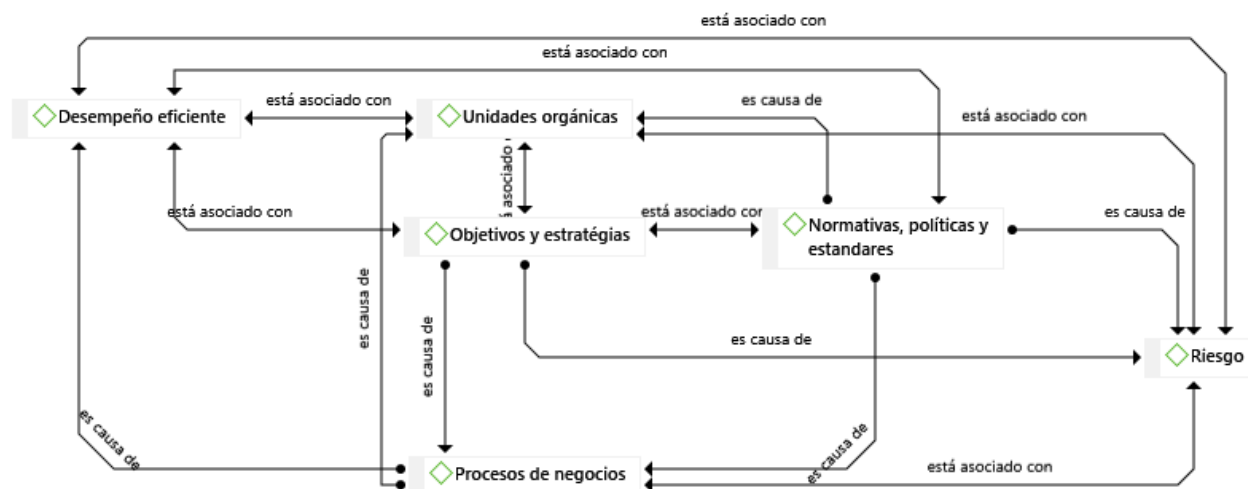
Results of the emergency index.

Code	Rooting	Density	I.E.
Business processes (*)	21	10	31
Objectives and strategies (*)	15	10	25
Efficient performance (*)	12	9	21
Regulations, policies and standards (*)	11	9	20
Risk (*)	10	10	20
Organic units (*)	11	9	20
Organizational culture	8	7	15
Value-added products	4	7	11
Actors	5	4	9
Analysis of information	2	7	9
Process automation	3	5	8
Context analysis	1	5	6

Note. The asterisk (\*) shows the codes that determine the pop-up categories.

**Figure 6**

Semantic network of the alienation paradigm of strategic planning and business process management



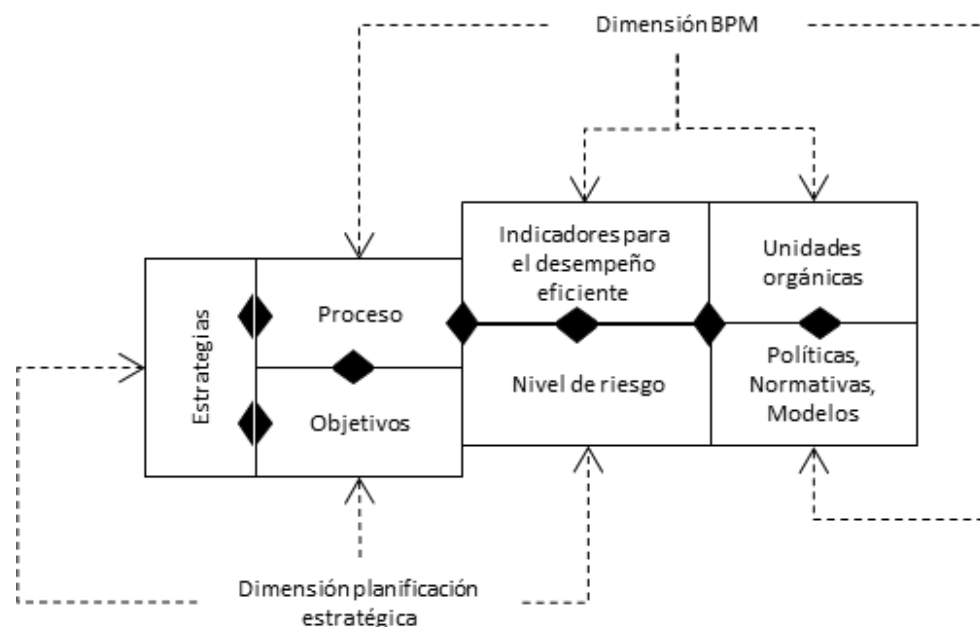
## Results

According to the exploration and analysis of the theoretical context and the experience of the professionals interviewed, seven organizational elements were obtained that were derived from the emerging categories: (1) objectives; (2) strategies; (3) level of risk; (4) business processes (5) indicators for efficient performance; (6) regulations, policies and standards; and, (7) organic units. Due to the relationship and the same nature between certain organizational elements, it was effective to group them into two dimensions, these derived from the guiding categories: Strategic Planning and Business Process Management.

Figure 7 graphically presents the factors of the proposal resulting from this study and Table 3 details the contribution of each organizational element with the alignment.

**Figure 7**

*Graphical representation of organizational elements for the alignment of strategic planning with business process management.*



**Table 3***Contribution of each organizational element to the alignment of strategic planning with BPM*

<b>Dimension</b>	<b>Organizational elements</b>	<b>Contribution to alignment</b>
Strategic planning	1. Objectives	It charts the way forward, ensuring that organizational elements are considered in every decision making.
	2. Strategies	It allows to meet the objectives not only in the short term, but also in the medium and long term, ensuring that there is no impact on the culture and organizational climate.
	3. Risk level	It reduces uncertainty by designing a management from a vision of anticipating barriers that could bring delays or a high number of unplanned and short-term changes that hinder management.
Business Process Management (BPM)	4. Processes	Avoids overload, waste and work clutter; by designing processes from a broad and comprehensive context that allow effective corrective actions, by outlining controls and changes that align with the other elements.
	5. Indicators for efficient performance	Increases decision-making from the analysis of management results through pre-designed and automated parameters and metrics that evaluate activities in an integral way and aligned with the goals.
	6. Regulations, policies and standards	Increases automatic decision-making by integrating into the design of management decision tools, internal guidelines or policies, and standards or legality external to the organization that align with the objectives and strategies of the organization.
	7. Organic units	It organizes an organic structure focused on the processes and goals set, through the creation, adjustments, unification or elimination of organic units according to their level of functional relationship or operation with the other elements of the alignment.

The rest of the codes are part of the management and are positively affected by the organizational elements of the alignment, in relation to adding value to the products that satisfy the users, through an automation of effective processes, the correct workload for each role and the correct analysis of the information obtained through data mining techniques; Not to mention that they will be part of the context of the next planning and its alignment.

## Conclusions

The research identified seven organizational elements, grouped into four dimensions, involved in the alignment between strategic planning and business processes; This allows the construction of an agile management that translates into integral, flexible, adaptive, which positively affects the organizational culture and performance, while considering technology, all this benefiting the organization in achieving its goals and sustainability over time, by delivering to its customers an innovative product.

It was demonstrated that the organizational elements of alignment positively influence the relationship with the organizational culture and The actors, when translating that digital improvements and transformations have a lower degree of uncertainty and the fulfillment of roles in each person does so responsibly by feeling part of the fulfillment of the goals because they know them and get involved in their activities.

In conclusion, an agile management to achieve the success of product innovation, requires in an essential way that organizations align their strategic planning with the processes and organizational elements so that it connects the personnel, technology and organizational culture with their priorities and organizational processes through appropriate methods that allow to achieve continuous improvements in management performance.

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