The Basics of Process Mapping

What is Process Mapping?

Process mapping is stepping back from the work to identify what it takes to complete a task.

Process mapping as a tool for analysis can be used to identify:

- What might be in the way of better quality or service?
- What frustrations or disconnects can we eliminate?
- BOTTOM LINE: Let's understand it and make the work easier.

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- What successful techniques can be applied elsewhere?
- BOTTOM LINE: Let's recognize when work is done well.
Top 10 Triggers for Process Mapping

1. Implementation of New Technology
2. Large-Scale Reorganization
3. Small-Scale Reorganization
4. Retirement/Succession Planning
5. Service Improvement Initiatives
6. New Leadership
7. More Workload, Same Amount of Staff
8. Same Workload, Less Staff
9. High Turnover
10. Cyclical Workload Peaks/Corresponding Frustration

Top 10 Wins

1. Clarity
2. Streamlined Workflow
3. Transparency
4. Team Building
5. Back-up and Cross-Coverage
6. Training Tools
7. Improved Communication
8. Better Use of Technology
9. Improved Service
10. Documented Procedures
Getting Started

1. Identify the process to be analyzed
2. Get necessary support from your leadership
3. Identify the START/STOP to focus the work
4. Identify the participants critical to success
5. Invite participants to participate and engage in this work
6. Prepare the team by ensuring they understand the goals
7. Gather the team by scheduling regular meetings

Map the Process

Map the Steps
- map out the significant chronological steps
- focus on the MAJOR steps necessary to accomplish the work
- create sub-process maps if necessary

Review the Process Map
- Does it accurately reflect the work?
- Have we captured the steps in the right order?
- Do steps occur concurrently?
- Are special challenges and important factors reflected?
Map the Process (continued)

Adjust as Necessary
- only when you carefully review the map together do you find missing details, omitted steps, and obscure language that needs to be clarified
- never skip the review process

Analyze the Results
- What does the map show us?
- Capture recommendations for process improvements.
- Look for quick wins: easy to implement, fast to implement, cheap to implement, within a team’s control, and reversible

Reading the Map

Complete Several Drafts
- you will NOT get it right the first time

Review Each Draft
- review carefully, there’s a lot of information there

Capture Improvement Ideas
- ideas and suggestions naturally bubble up during the group’s discussion
- make sure to document them

Commit to Next Steps
- don’t just file the map away, work it
- ownership of next steps is critical
The Human Connection

Preparing the Team
- it’s critical to prioritize the work that needs to be analyzed – you must identify where valuable time and effort is best spent
- process mapping should never be a punitive action

Setting the Tone
- clearly state the goal and reason for this examination of workflow
- establish trust and rapport with the team
- excitement is contagious
- people can sense if you are not engaged, not interested, or have a pre-determined outcome

Understand the Resistance
- the group will be reviewing what is done, and why it is done that way
- the prospect that the work they have mastered might be changing can/will bring anxiety
- understand this… remember this… but keep the group moving forward

Grab the Opportunity
- in many cases no one has ever really examined how complex the work is
- What may appear to be a simple task actually takes a lot of effort and coordination
- process mapping sends a message that the work is important enough to understand
- this can be an effective way to support your staff
The Human Connection (continued)

Facilitation Challenges
- establish ground rules - right from the start
- be willing to pull the group back to the major steps
- be on alert, thinking through the work as it is described
- you will get used to asking, “What happens next?”

Encourage and Understand
- when the group makes progress, tell them
- when they identify improvements, support them whenever possible

Tools to Use
- Existing Standard Operating Procedures can give you a jump start
- Visio and OmniGraffle are helpful software programs
- Word and excel can also be used to create basic visuals

Lessons Learned

Think of it as completing a puzzle.
- How does one piece (step) fit (feed) into the next.
- Hold judgments.

Active Listening ...
- You must actively listen to the entire conversation.
- It helps if you are naturally inquisitive... “so how does this really work?”

What goes into those little boxes?
- Keep it simple, not complex
- Process steps should be stated as “actions” (use verbs)
- Update the map as you move through the project