Map Your Process

CREATING A PROCESS MAP
THAT DRIVES CHANGE

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Introduction

The first time I saw a "good" **process map**, I was struck by how **transformative** it could be if used correctly. I thought back to previous employers and realised just how they would have **benefited** from having agreed, consistent and up-to-date processes in place. The benefits seem obvious to me now, but looking back, there seem to be **five key reasons** why these companies didn't see process documentation as business critical.

1. On the surface, everything was **working fine**, so why document their ways of working? It's just for solving problems, isn't it?

2. Smaller companies see **process mapping** as a "big business" solution and not applicable to them.

3. There was a misconception of what makes good process mapping. The view was that they didn't need "**boxes and arrows**" to tell them how to do a job. Good process mapping is so much more than this.

4. There weren't people with the requisite skills to create good process documentation within the organisation.

5. Perhaps the most common reason was that they just didn't have time to document and maintain process documentation. Couple this to the reasons above and the importance and **priority** plummets.

We'll come back to point five again at the end of the document, but having implemented **process management** at numerous companies over the last twelve years, I can confidently debunk the first three. Even when everything seems to be going well, there can be swathes of inefficiencies, risk and variation under the surface which, if addressed, could save huge amounts of time and money. We have worked with businesses of fewer than ten people, and helped them to successfully deploy process management systems, so size doesn't have to be a barrier to **success**. You'll notice that I've used the term "process management" there. **Process mapping** is the foundation for process management (e.g. process measurement, analysis, optimisation etc), so if it is being seen as just "boxes and arrows" then the true power of what is being created will be missed.

This document does not get into process management but does provide you with the **key considerations** and approaches to beginning that journey through good process mapping.

I hope that you find the content **helpful** and that it helps you to start creating **meaningful** process documentation.

Good Luck!
John Stanton | Director | Map Your Process

Map Your Process

STAGE 1

PREPARATION

1) BE CLEAR ON WHY YOU ARE DOCUMENTING YOUR PROCESSES

2) ENGAGE WITH THE PEOPLE WHO PERFORM THE ACTIVITIES

3) CREATE AN OPEN ENVIRONMENT

4) CONSIDER HOW DETAILED YOUR MAP SHOULD BE

5) CHOOSE THE SOFTWARE YOU WILL USE FOR MAPPING

1 BE CLEAR ON WHY YOU ARE DOCUMENTING YOUR PROCESSES

Without an end goal or vision in mind, the chances are that the exercise will merely result in a one-time snapshot of your company, lacking the critical information that you require. Where this happens, the diagrams will neither inform nor drive change and will quickly become obsolete due to lack of use and maintenance. When you are clear on your goal - map your processes accordingly and gather relevant supporting information.

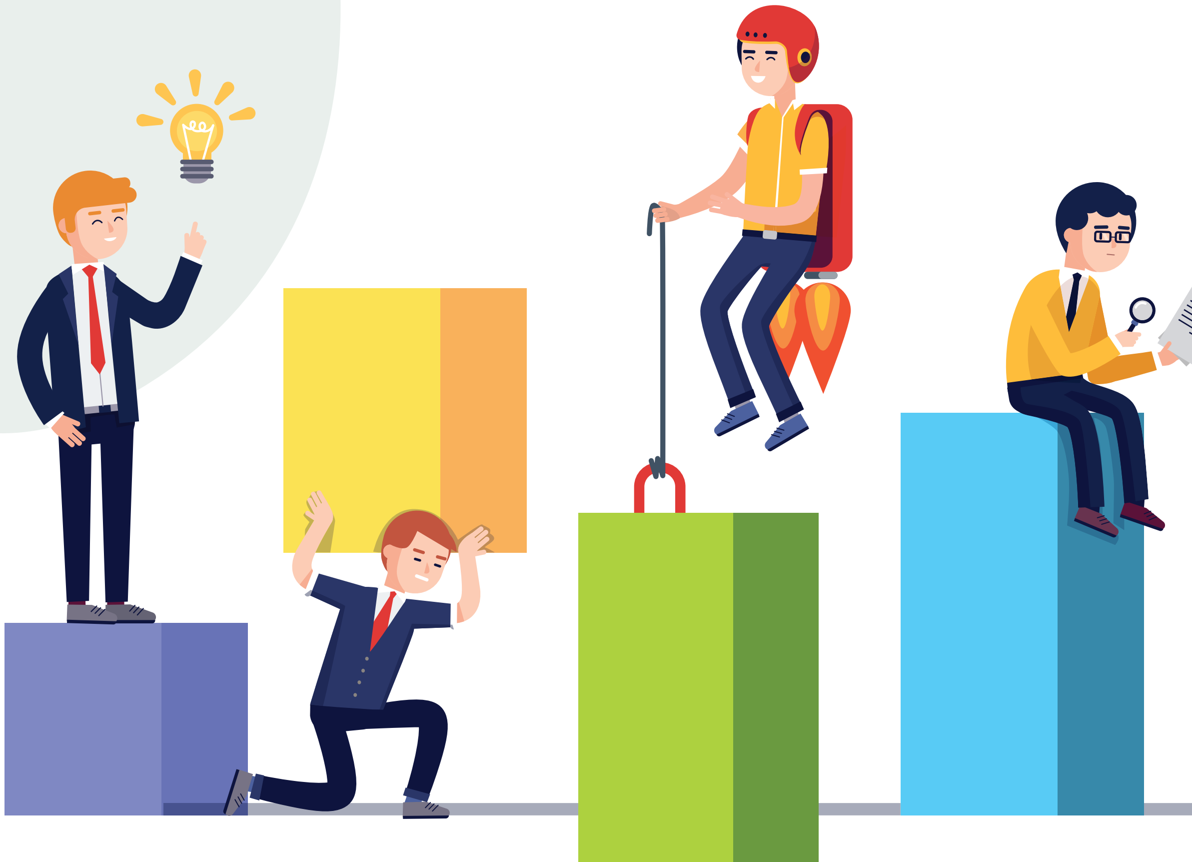
Here are some of the reasons that a business might choose to start documenting their processes:

- Establish clarity around their current processes.
- Develop consistent ways of working.
- Remove key person dependencies.
- Identify inefficiencies and duplication of effort.
- Understand and manage risk points.
- Build a foundation for successful change.
- Create effective staff training.
- Drive regulatory compliance.
- Calculate business process costs.
- Prepare for investment or sale.

This isn't an exhaustive list, but it covers the majority of reasons why clients might engage us. There are also additional benefits (e.g. increased staff engagement) that can be derived off the back of good process documentation.

2 ENGAGE WITH THE PEOPLE WHO PERFORM THE ACTIVITIES

If you are going to successfully map the current process, then it makes sense to speak to those with the hands-on experience of executing the work. Management is more likely to visualise activities as they should be performed, not how they actually are. Those who perform the tasks day-in, day-out are best placed to describe the true state, picking up on system workarounds, client-specific activities, exceptions and rework. Of course, to ensure that you do get the true picture, you need to create an environment where people feel able to speak honestly, which brings us on to our next point…



3 CREATE AN OPEN ENVIRONMENT

If your staff don't feel comfortable giving the true state, then you're going to end up with a sanitised, inaccurate view of your organisation. When capturing your as-is processes, it's likely to be the case that it reveals inefficiencies, risks, and activities that aren't widely known. It needs to be made clear that for better or worse, you need to understand the actual way of working and that there is something of an amnesty for any poor processing that is identified. Create the right environment, incentivise process excellence and you will be rewarded with the results.

4 CONSIDER HOW DETAILED YOUR MAP SHOULD BE

Consistency is critical when mapping multiple processes, and a key part of this is deciding on the level of detail you map to. Too high and you'll miss out on the gold, too low and you'll get bogged down in unnecessary detail, creating maps which no one will use. So what is the right level of detail to map to? Unless you're mapping your processes in order to automate them in some way, then going to "keystroke level" is rarely necessary. We recommend going to a level above keystroke—e.g. if describing the set up of a client on a system, we would capture the key elements (Enter Client Contact Details, Enter Client Payment Details) rather than going into the specifics of what information needs to be added. Where the mapping software allows, consider attaching screen recordings of the detail and attach them to the map. This brings us neatly onto....

5 CHOOSE THE SOFTWARE YOU WILL USE FOR MAPPING

There are many software options for capturing your processes - too many to go into here. However, there are solutions to suit varying ranges of ambition in terms of what you want to deliver from the mapping initiative as well as significantly different budgets.

At the risk of sounding like a broken record, before doing anything, think about what it is you want to achieve. You'll potentially be capturing a lot of information and while the software might do all that you want to do today, if it doesn't support your future ambitions, you might find it hard to migrate from one platform to another.

We're always happy to discuss the options available, so please get in touch if you would like to talk about this.

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STAGE 2

GETTING STARTED

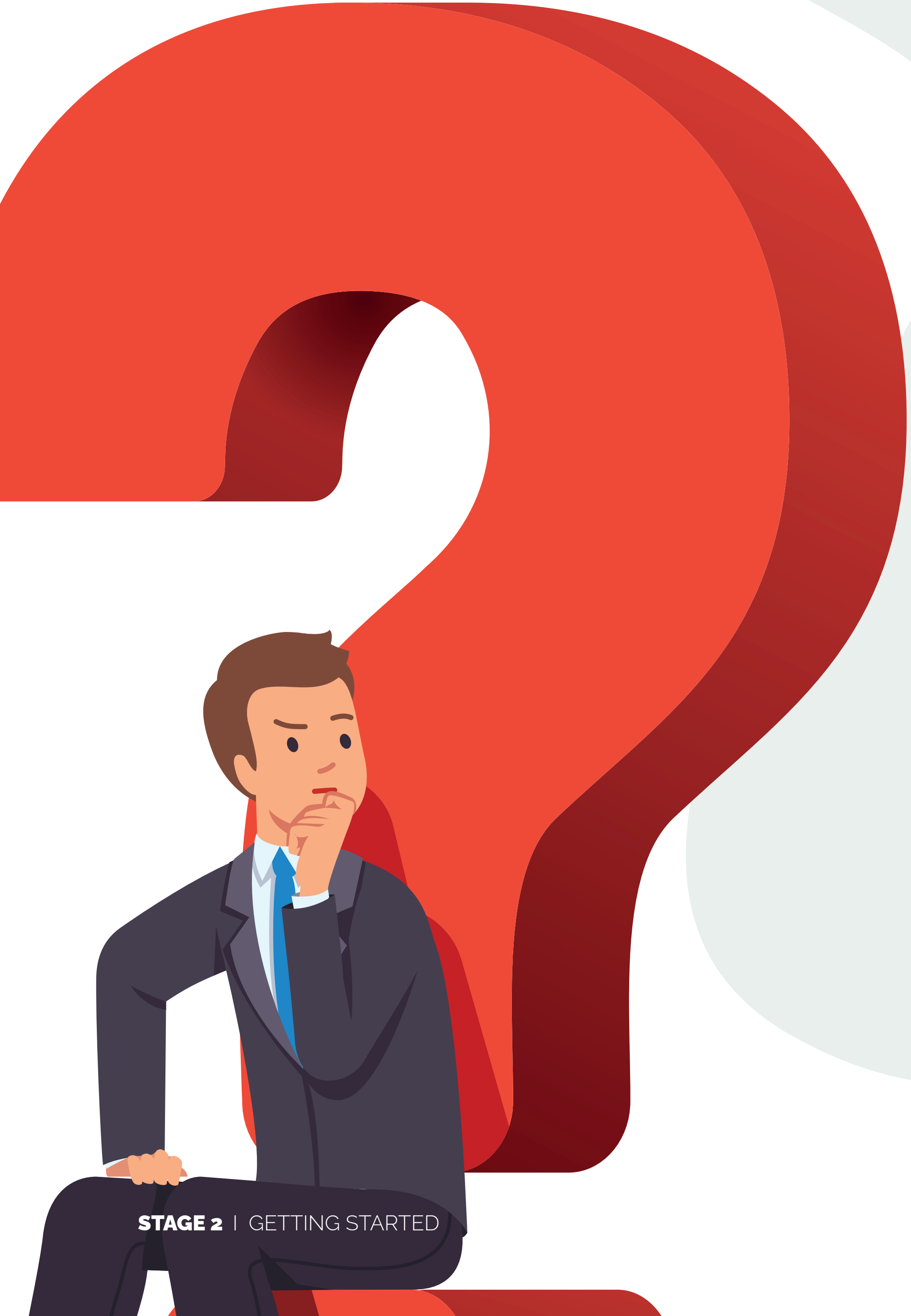
1) TRY NOT TO MAP YOUR OWN PROCESSES

2) FOCUS ON MAPPING THE ‘AS-IS’ PROCESS TO START WITH

3) FRAME THE PROCESS BEFORE YOU MAP THE STEPS

4) MAP THE ‘HAPPY PATH’ FIRST

5) DON’T TELL PEOPLE HOW THEY DO THEIR JOBS



1 TRY NOT TO MAP YOUR OWN PROCESSES

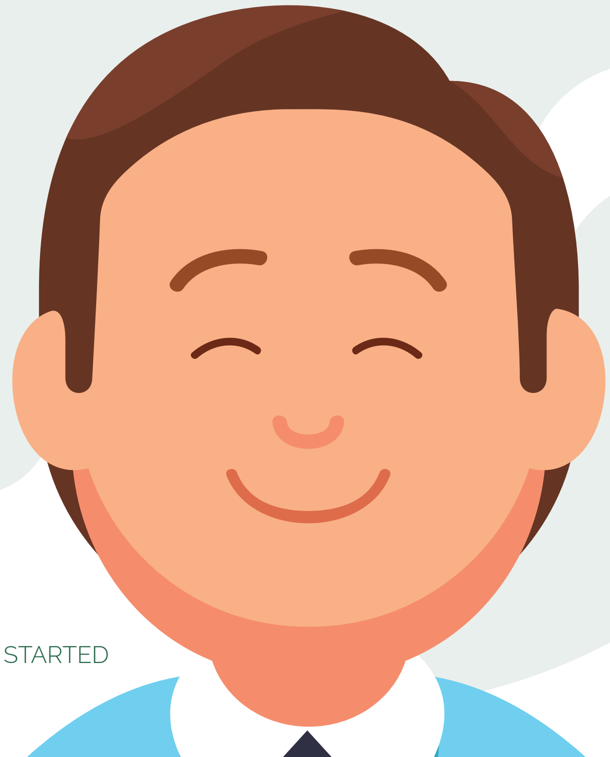
In a perfect world, you should try and avoid mapping your own processes as much as possible. This is because without the independence of another person interviewing, it is very easy for steps to be missed. The chances are that the process being mapped is second nature to you, but that actually increases the probability of parts of the process that are 'obvious' to you, being overlooked. Having someone challenge the process and ask questions - "What happens if…?". "What do you do when…?" - will go a long way to ensuring no elements of the process are missed out.

2 FOCUS ON MAPPING THE AS-IS PROCESS TO START WITH

When we talk about the as-is process, we mean how the process is actually performed today, not how it should be or how you want it to be. These three things are often very different. If you do not capture the as-is process, then any projects that use the information will be basing requirements and recommendations off of incorrect data, leading to under delivery, post-implementation workarounds or delays. It's critical that you understand the process in order be clear as to what needs to be done to move to the optimal way of working. The exception to this is where a process lacks any clear definition and/or is performed differently each time it is executed. In these instances, attempting to map an as-is process will add little value and as such, the aim should be to define a 'to-be' process which must be adopted by all users

3 FRAME THE PROCESS BEFORE YOU MAP THE STEPS

Set the start and end points for your process. If you don't, there is the possibility the process starts to run outside of what you set out to map - especially where the people you are interviewing are responsible for several, interconnected tasks. Your initial input should be the trigger for the process taking place, e.g. 'Complaint from a client via email' or even '10 am Friday morning' where a process takes place at a specific time. The output should be the final piece of the process, e.g. 'Report sent to client', 'All exceptions resolved'. By framing in this way, it keeps the subject matter experts (SME) focused on the process that they are describing and directs them towards a specific, agreed endpoint.



4 MAP THE 'HAPPY PATH' FIRST

The 'happy path' is the term used to describe a process flow working as it should - i.e., without errors, exceptions or rework. We always recommend that this is mapped first to create the simplest view of the process. If you start documenting exceptions as you encounter them, you run the risk of disappearing down a 'rabbit hole', losing direction and clarity around the outcome of the process. It makes sense to note where an exception or rework exists and revisit these once you have the happy path documented.

5 DON'T TELL PEOPLE HOW THEY DO THEIR JOBS

When working with an SME to document how they perform a task, the chances are that you are taking them away from their day-to-day role. This will often mean that they want to get back to their daily tasks and as such, be keen to make the mapping session as short as possible. As a mapper, your job is to take the SME's knowledge and create the process map from this. Don't be tempted to suggest the next step or ask questions that are too leading in nature. It's too easy for them to blindly agree, meaning that you run the risk of missing steps or not documenting the as-is process.

Map Your Process

STAGE 3

CHECK THE MAP

1) WALK THROUGH THE PROCESS ONCE CAPTURED

2) ENSURE YOU HAVE ALL SUPPORTING INFORMATION

3) REVIEW THE PROCESS WITH A SECOND PERSON

1 WALK THROUGH THE PROCESS ONCE CAPTURED

The initial documentation of process, will heavily rely on the SME providing you with the relevant information. When the process map is complete (including adding any supporting information), walk through the process with them - them hearing it back might get them to pick up on something that they have missed or isn't quite right in the flow.

2 ENSURE YOU HAVE ALL SUPPORTING INFORMATION

As we have already alluded to, people's time is a precious commodity, so make the most of it while you have it. There will always be some follow up questions as you find out more about other processes, or when a new piece of information comes to light, but you need to avoid recovering old ground to ask for information that should have been gathered already. The walk through of the completed map is a good time to makes sure that all supporting information (e.g. templates, file locations, links to external websites etc) is in place. If anything is missing, arrange for the SME to provide it asap and agree where in the map it will be attached. No one wants a third run through of the same process just to agree which attachments are needed!

3 REVIEW THE PROCESS WITH A SECOND PERSON

Just because one person or group executes a process in a certain way, it's no guarantee that the rest of the team follow the same procedure. After you've mapped the process with the first SME, get a second person to talk you through the same process without showing them the diagram (it's too easy for them to agree with it) and note any deviations from what is already documented. Once they have provided their view of the process, show them the diagram that you have already captured. If what they described was in line, then walk them through the process and double check that it aligns with their way of working. Where you identified differences, work with the second person to add these steps as process variants. It's important to note that this isn't about changing the map that you created with the original SME—you've already agreed that— this is about understanding where the same process is performed differently.

Map Your Process

STAGE 4

POST-MAPPING SUCCESS

1) MAKE THE PROCESS MAPS AVAILABLE TO ALL

2) ASSIGN THE RIGHT PROCESS OWNERS

3) KEEP YOUR MAPS UP TO DATE!

1 MAKE THE PROCESS MAPS AVAILABLE TO ALL

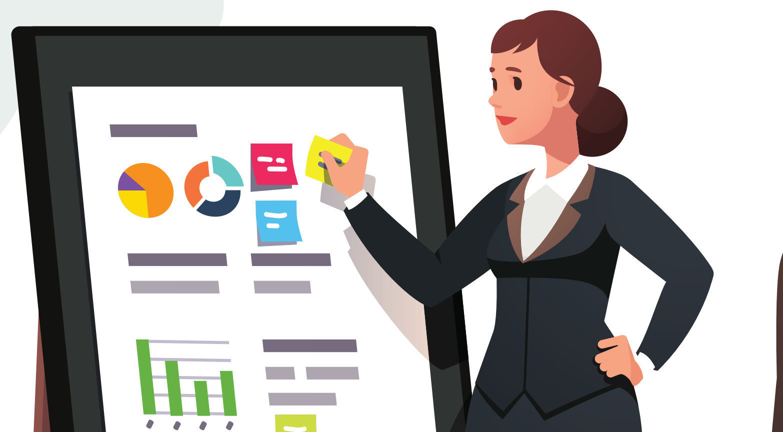
We emphasise to our clients that the process improvement journey has to be a collaborative one. If the diagrams aren't available to all, then the opportunity for sharing best practices and identifying better ways of working can be lost. The people who perform the activities day-in, day-out are the ones who are best placed to see where changes can be made. Assuming that there isn't anything in an 'as-is' process that is confidential, then why wouldn't you want to make the diagrams available to everyone?

2 ASSIGN THE RIGHT PROCESS OWNERS

All maps should have an owner. Someone who is responsible for ensuring that the map is kept up to date, reflective of the as-is process, and followed by all. The tendency is for the managers to automatically be made the owner of all relevant processes, but we think this is a missed opportunity. Allocating ownership a level or two down from managers (depending on your structure) can help foster greater responsibility within a business whilst not taking accountability away from management.

3 KEEP YOUR MAPS UP TO DATE!

We have seen instances of organisations allocating significant time to mapping their processes and then not maintaining them. Go back to the first page of this document: committing to keep the maps up to date is a key part of starting out on this journey. If you cannot or do not intend to keep the content current, then think about whether this is the right approach to achieve your goals. There are occasions where a one-off piece of mapping is all that is required, but if you intend using them in the longer term, they need to be maintained. From a regulatory perspective, failing to conduct regular reviews of the diagrams, renders them obsolete as they are not seen as a reliable source of information. While we always encourage our clients to update the diagrams as and when changes occur, we also recommend that they introduce a quarterly (or at least semi-annually) attestation process whereby all process owners are required to sign off that the diagrams remain an accurate reflection of the as-is process (including all attachments). Not only does this create an audit trail, but it will also quickly flush out any undocumented changes to the process.



Map Your Process

FINAL
THOUGHTS

As you've probably gathered from the various steps and point 5 from our introduction, there is a **time commitment** required if **process mapping** and management are to be done properly. This shouldn't be underestimated and consideration should be given to who will perform the mapping. Will you be able to regularly free up some of their time for this task? Think about why you are documenting your processes - does this help prioritise some key processes and reduce the initial time commitment?

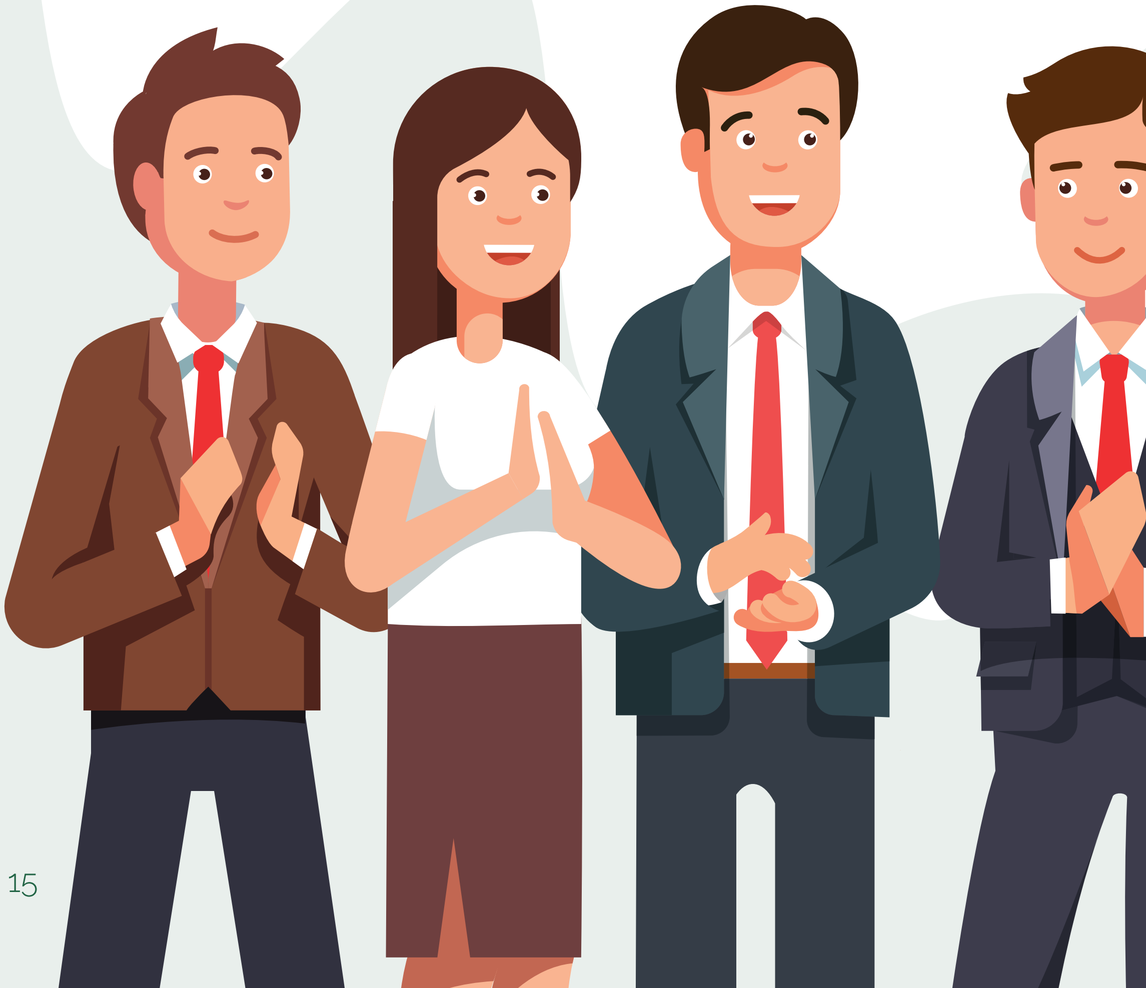
There also needs to be a **purpose** to creating process documentation, otherwise the chances are that it will not be done properly. The only thing worse than no process documentation is incorrect process documentation that people believe to be correct!

If you are going to document the processes with purpose, you need to follow a few basic rules:

- Be prepared to uncover the **truth** about how the business works
- Document how the process is really performed
- **Engage** with the people who perform the roles
- Document what happens when things go wrong
- Keep the map(s) **up to date**
- Use the maps to help inform **decision making** and projects

If you can't commit to all of these bullet points, then it might be worth taking a step back and **reassessing** whether this is the right thing to do. That's not to say you should stop at this point - there might be very good reasons why you can't commit to them, but it is worth considering whether there are other options available to you.

If you're still with us, then you're already **on track** to start **changing** the way your business operates!



We hope our guide will help you get set on your way to effectively mapping the processes within your business.

Like everything worth doing, the reality is that mapping your processes, keeping them up to date and using them to drive change takes time and effort, especially if you do it correctly.

If you don't have time to do this yourself, we can help.

We pride ourselves on helping our clients to develop a solution that perfectly meets their aims and capabilities.

If you would like to find out how we can help your business, then please contact us via one of the methods below.

Call us on +44(0) 1403 458138
Email enquiries@mapyourprocess.co.uk or
Book a call via our website
www.mapyourprocess.co.uk

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THANK YOU