



NJ PMI Chapter
May 6th Symposium 2013

Developing World-Class Process Maps

Lori Britt
(516) 551-7488
lbritt@majoroakconsulting.com

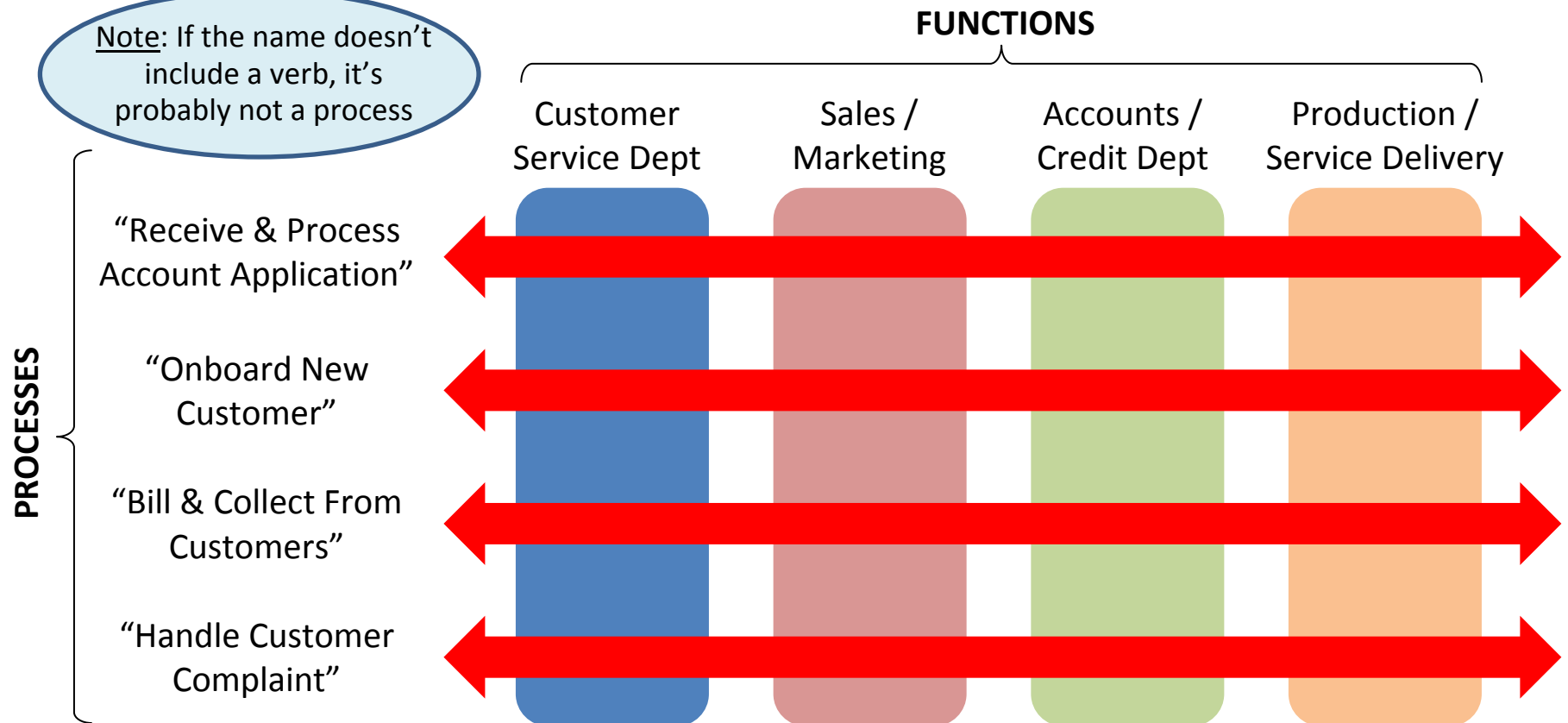
Agenda

- 🐘 Process Mapping – Background
- 🐘 Enterprise Mapping
- 🐘 Current State Mapping and Analysis
- 🐘 Capability Requirements
- 🐘 Future State Process Mapping
- 🐘 Q&A

Customers Experience a Company's Processes, Not its Functions

- Processes are what happen when functions come together to perform a task
- It's normally poorly designed and executed *processes*, not *functions*, that cause inefficiency and ineffectiveness in organizations

Note: If the name doesn't include a verb, it's probably not a process



Why map business processes?

Mapping processes enables organizations to:

👉 Understand what the process really is...

- Detailed information of what is currently happening, who does it, predictability
- Determine “real process” vs “perceived process”

👉 Measure the effectiveness and efficiency of the process

👉 Understand where waste and inefficiency exist

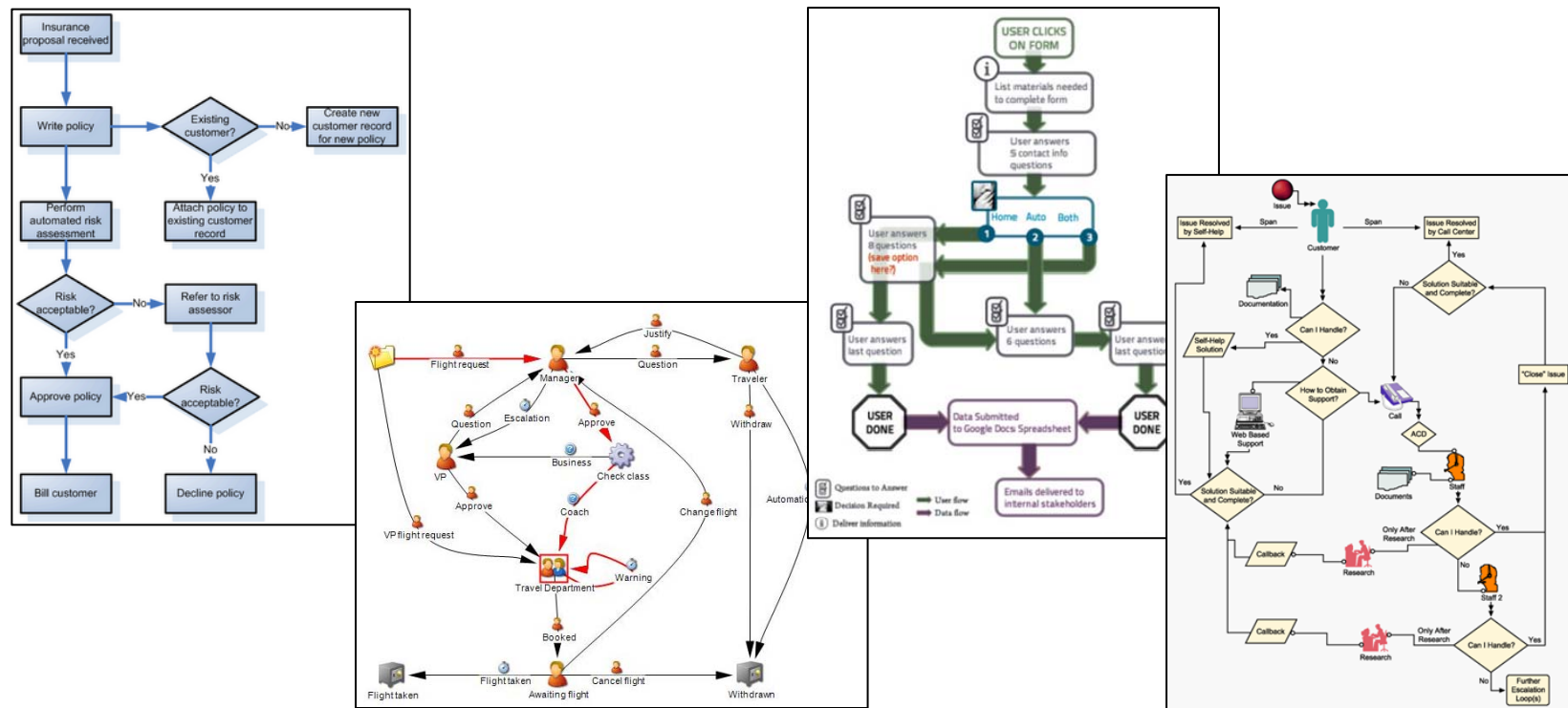
- Delays, unnecessary handoffs, duplication of effort, etc
- Impact on the customer or partners

👉 Develop new improved processes

- Reduce or eliminate inefficiency
- Improve the customer experience
- Clarify roles and responsibilities

There are many ways to document a process

- There are endless ways to map a process. The Major Oak methodology for process mapping is thorough, complete and valuable to uncover current state issues and define future state opportunities.



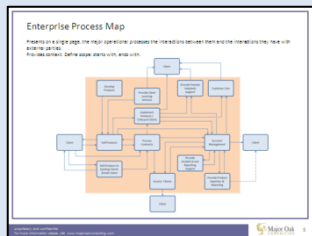
Process Mapping Examples

Process mapping involves a series of steps, from confirming process scope to future state design

🐘 Before beginning the process mapping journey, it is important not to immediately rush into the detail of process maps. Process mapping typically takes place across four phases.

Phase 1

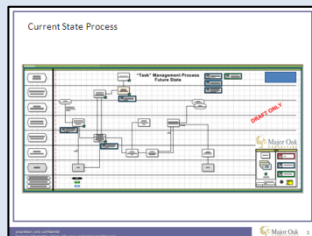
Enterprise Overview



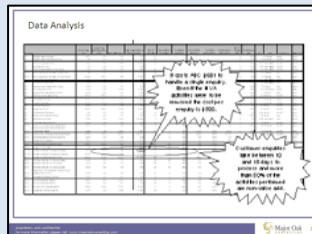
Enterprise Process Map

Phase 2

Current State Mapping



Current State Process



Data Analysis

Phase 3

Capability Requirements



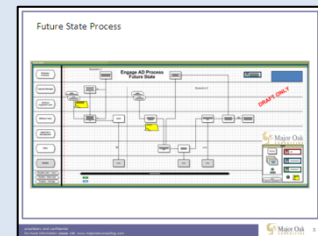
Future Directions



Capability Requirements

Phase 4

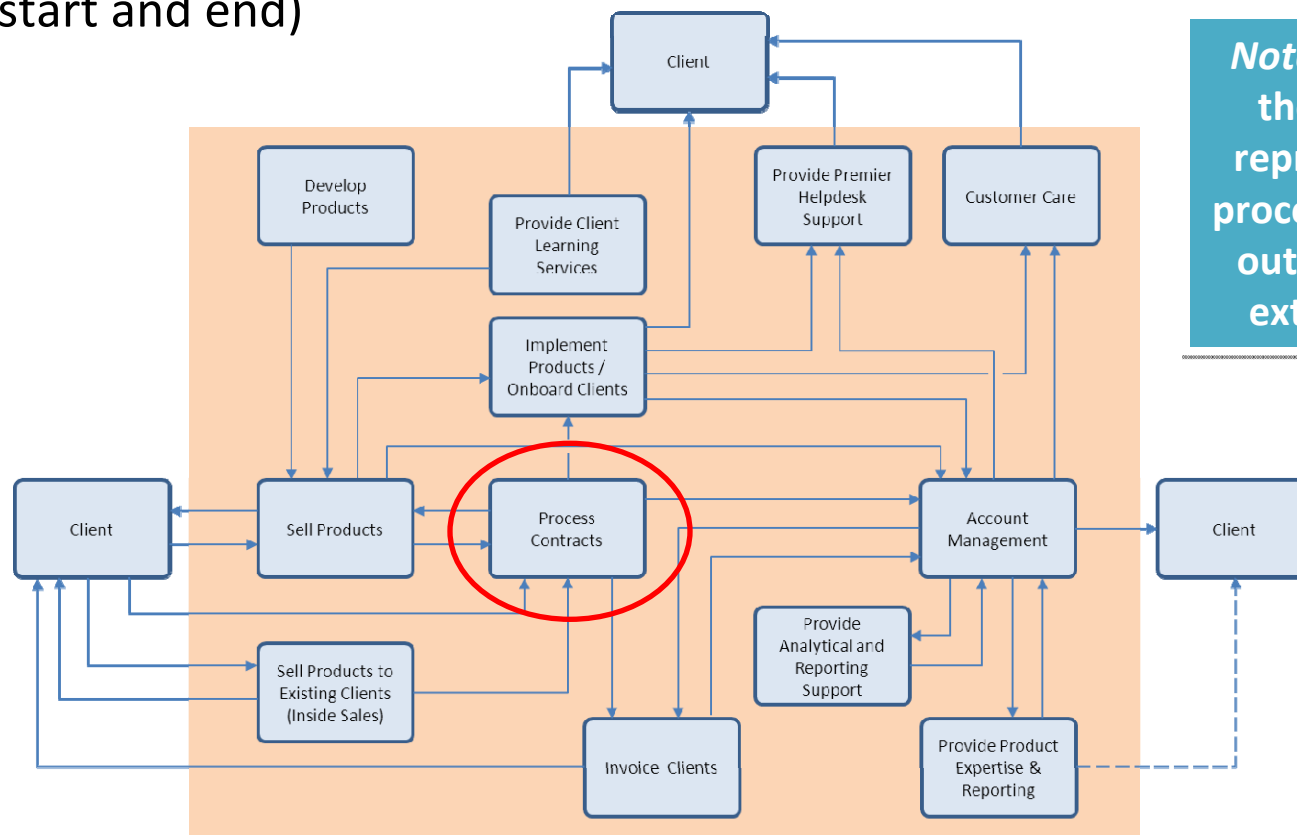
Future State Design



Future State Process

An Enterprise Process Map provides context and scope for your processes

- 👤 An Enterprise Process Map critically provides context (i.e. interfaces with other processes), as well as scope for processes (i.e. where the processes start and end)

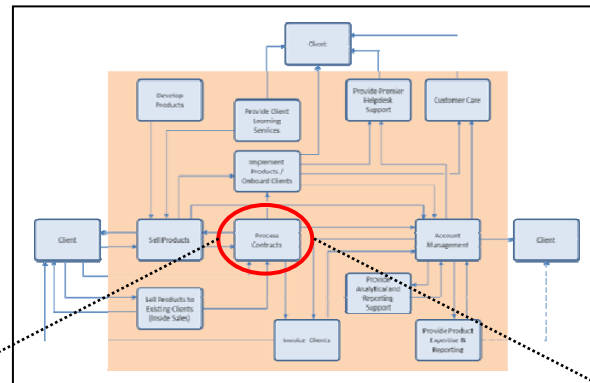


Note: Boxes inside the shaded box represent internal processes and boxes outside represent external parties.

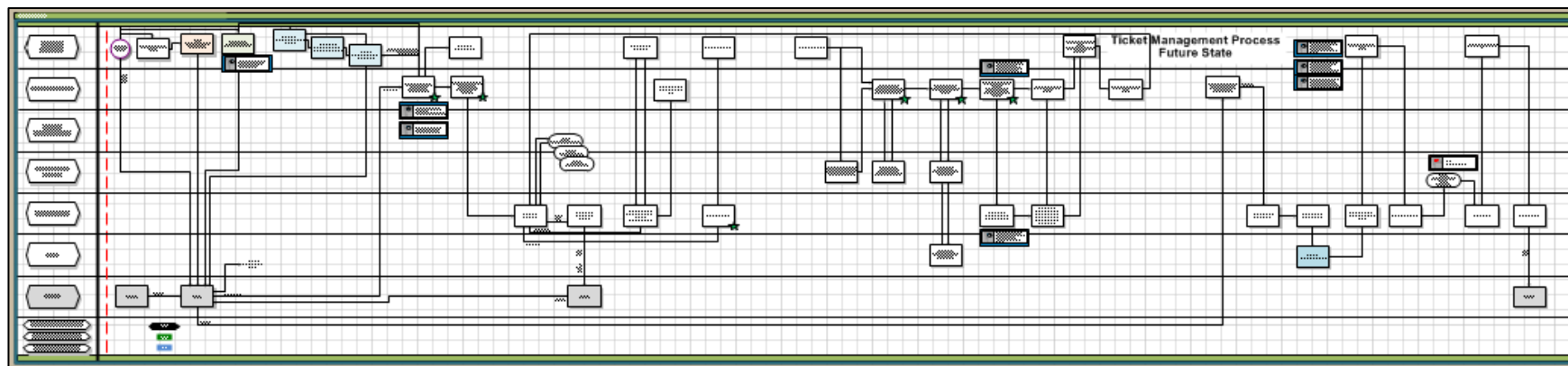
Enterprise Process Map (example only)

Each box on the Enterprise Process Map represents an individual process

- 👉 A process map presents the detailed activities of an individual process, who performs them, how they interact and which systems are used



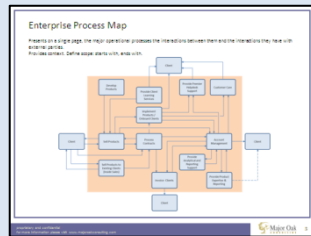
Enterprise Process Map



Process Map

Phase 1

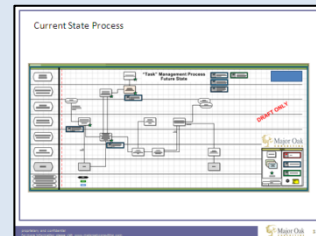
Enterprise Overview



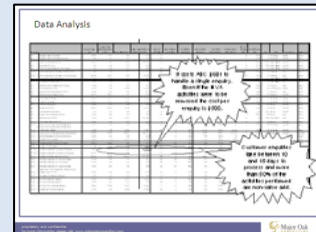
Enterprise Process Map

Phase 2

Current State Mapping



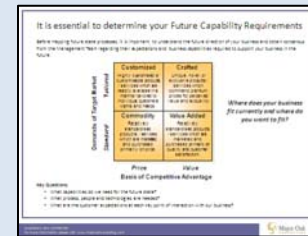
Current State Process



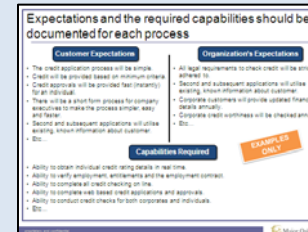
Data Analysis

Phase 3

Capability Requirements



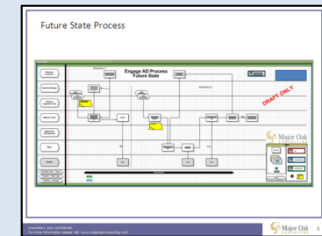
Future Directions



Capability Requirements


Phase 4

Future State Design



Future State Process

How do you begin mapping the current state?

-  A current state map focuses on what **ACTUALLY** happens in a process. Process mapping starts with an understanding of the process details by asking the following questions:

Current State Process Mapping

1. What are the specific tasks?
2. Who performs each task?
3. Who is the customer(s)?
4. Are there other stakeholders?
5. What are the decision points?
6. What systems are used?

There are many ways to gather data for current state process maps

Tools to capture process information and gain an understanding of the current state include:

Tip: Use a mixture of these techniques

- 🐘 **Existing documentation:** always leverage any process documentation that already exists
- 🐘 **Interviews:** one-on-one interviews with individuals who are managing, as well as performing the process
- 🐘 **Observations / Walkthroughs:** watching a process or individual in action – can be transaction specific
- 🐘 **Workshops:** targeted working sessions with a group of people involved in performing the process
- 🐘 **DILOs (“Day In The Life Of”):** shadowing individuals for a full day to experience first hand how they handle the process



**Conduct Interviews /
Observe Processes**

The process mapping workshop should be a fun and interactive experience

- 🐼 **Goal:** To attain a clear, agreed upon depiction of the current state process
- 🐼 **Duration:** Depends on the complexity of the process, but typically schedule a half day if under 8 attendees and full day if 8 or more attendees
- 🐼 **Attendees:** Include anyone that touches the process in the workshop
- 🐼 **Inputters to the process**
 - Process stakeholders – at least one person per stakeholder group
 - Individuals managing and performing the detailed process
 - Receivers of the output of the process (internal customers)
- 🐼 **Facilitator:** The primary role of the facilitator is to engage the attendees to ensure everyone is involved. The facilitator should be a skilled facilitator with process mapping experience
 - It's best when the facilitator is not connected to the process being mapped – so they remain unbiased by the discussion

In our experience, there is always healthy discussion about what really happens in the current state

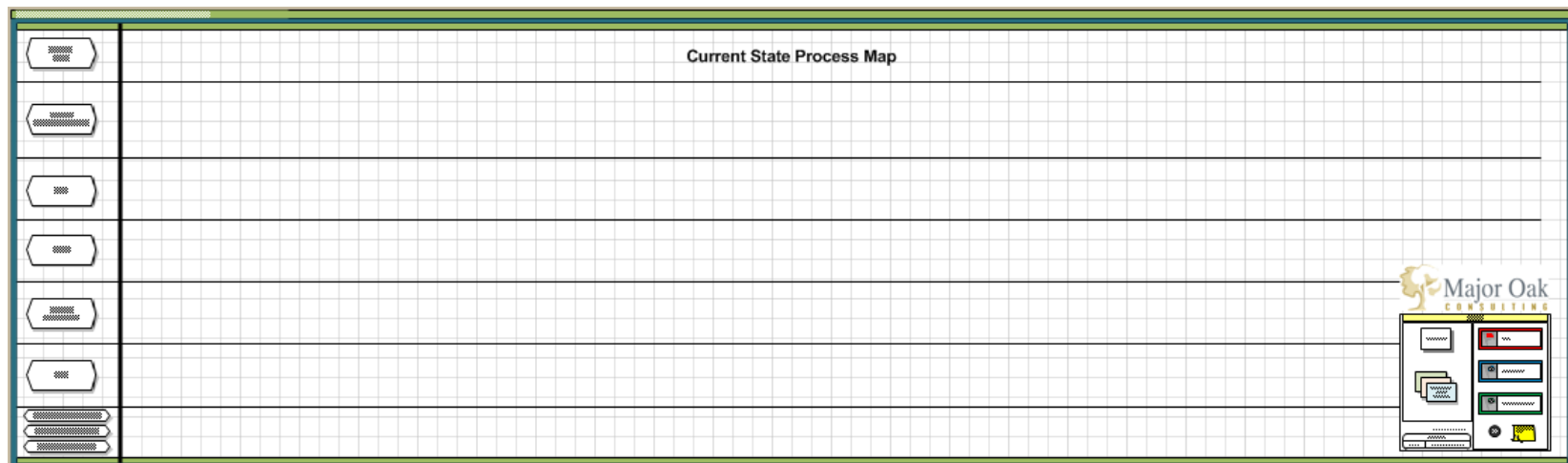
A process map without swim lanes is like a bike without pedals

It is extremely difficult, maybe impossible, to improve a process if you don't know who is responsible for performing the activity.

The benefits of swim lanes are:

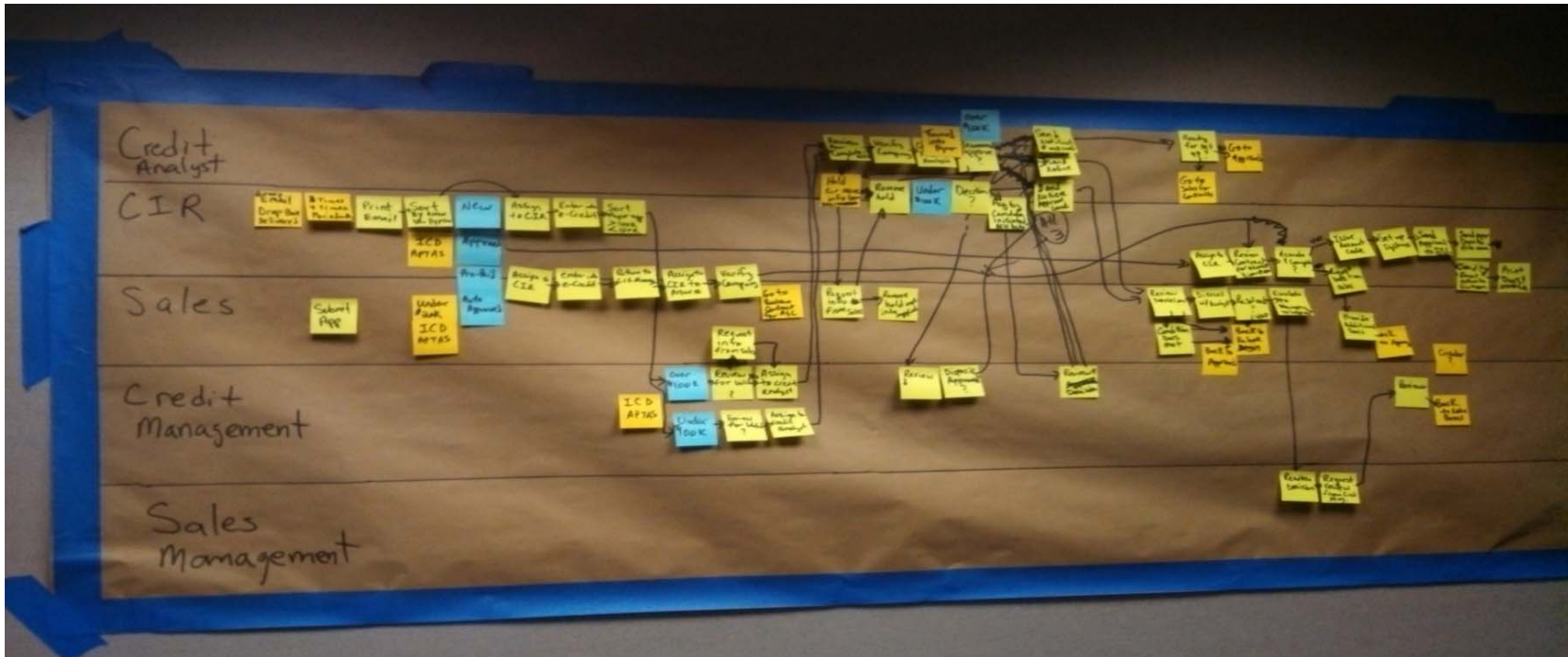
- 👤 You know who is responsible for each step in the process
- 👤 You can see how many people actually touch the process
- 👤 You can see the hand-off points and where things could fall through the cracks
- 👤 You can see back and forth interactions between the same people

Tip: Setup a swimlane for every process participant

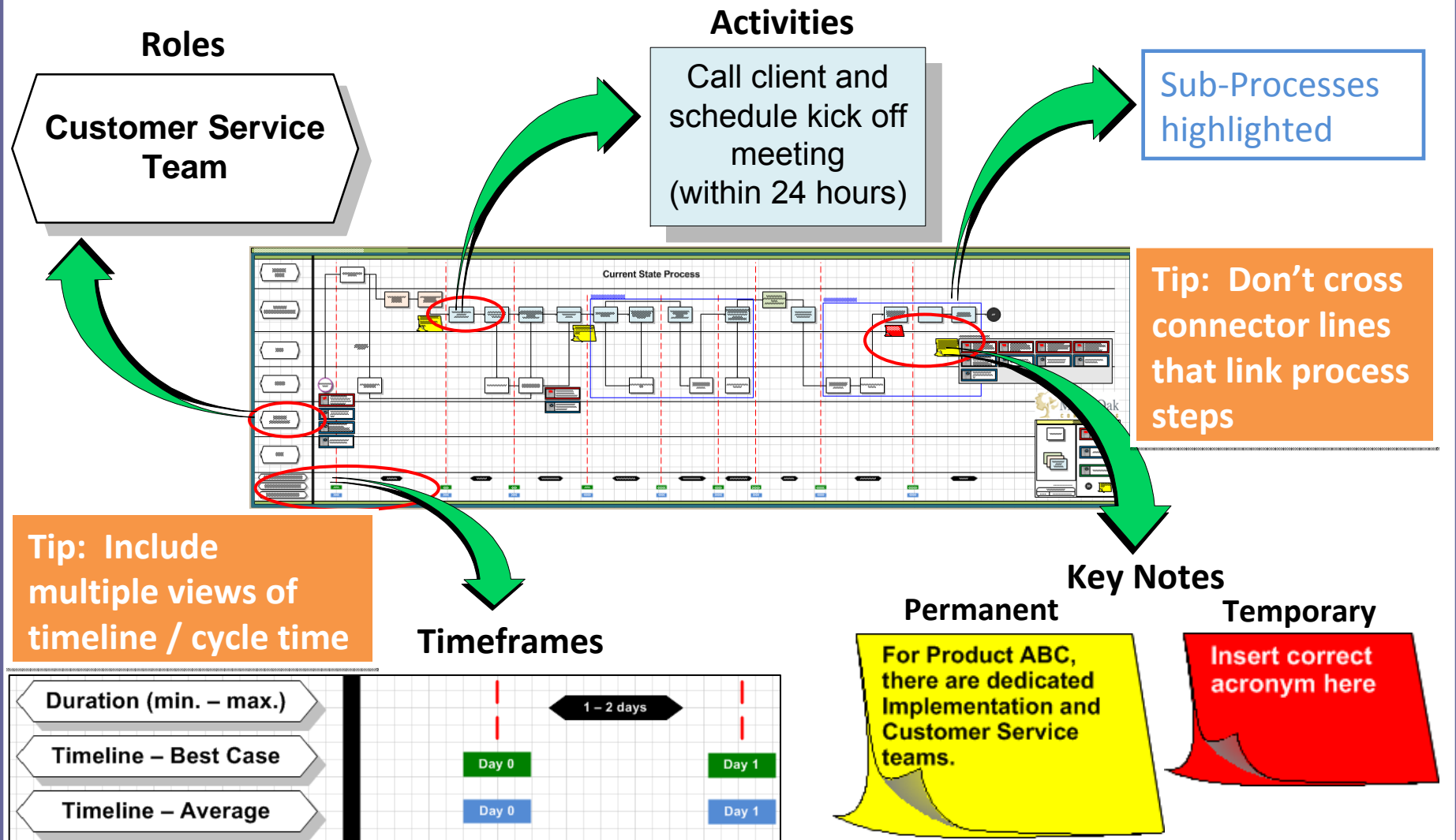


Workshops: Process Mapping is a science, but don't forget about the art

Process mapping is both a science and an art. The science is knowing the make-up of a process and being able to distill down to each specific task and decision point. The art is the creative process of how to draw the process on paper to make it come to life.



Key elements of your process map should include:



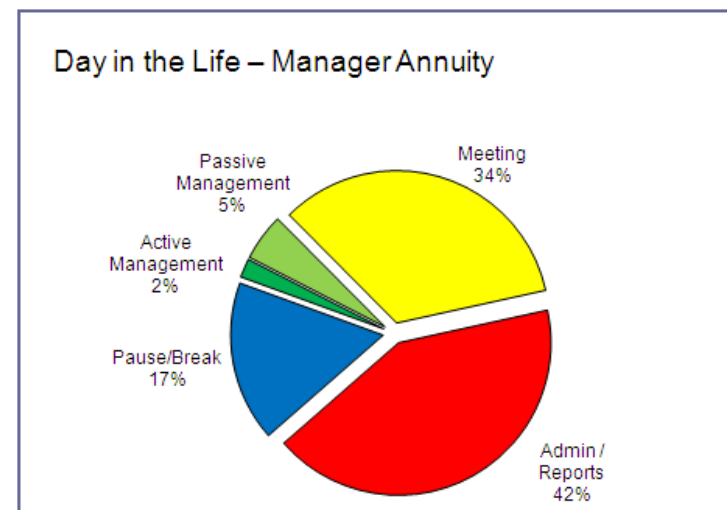
A current state map is the basis for uncovering process issues and opportunities for improvement

Once the current state has been mapped, it's time to validate, analyze and add supporting detail to the map. Examples of current state analysis include:

- 👤 Validate the map with the core functional team
- 👤 Identify manual tasks that can be automated
- 👤 Identify any task that can be eliminated (non-value added)
- 👤 Quantification of activities, tasks and transactions

Tip: Review the draft map with core team to validate you got it right

- Cycle times
- Volumes
- Defects
- Handoffs
- Wait times
- Costs
- Timeframes
- Process loops / rework



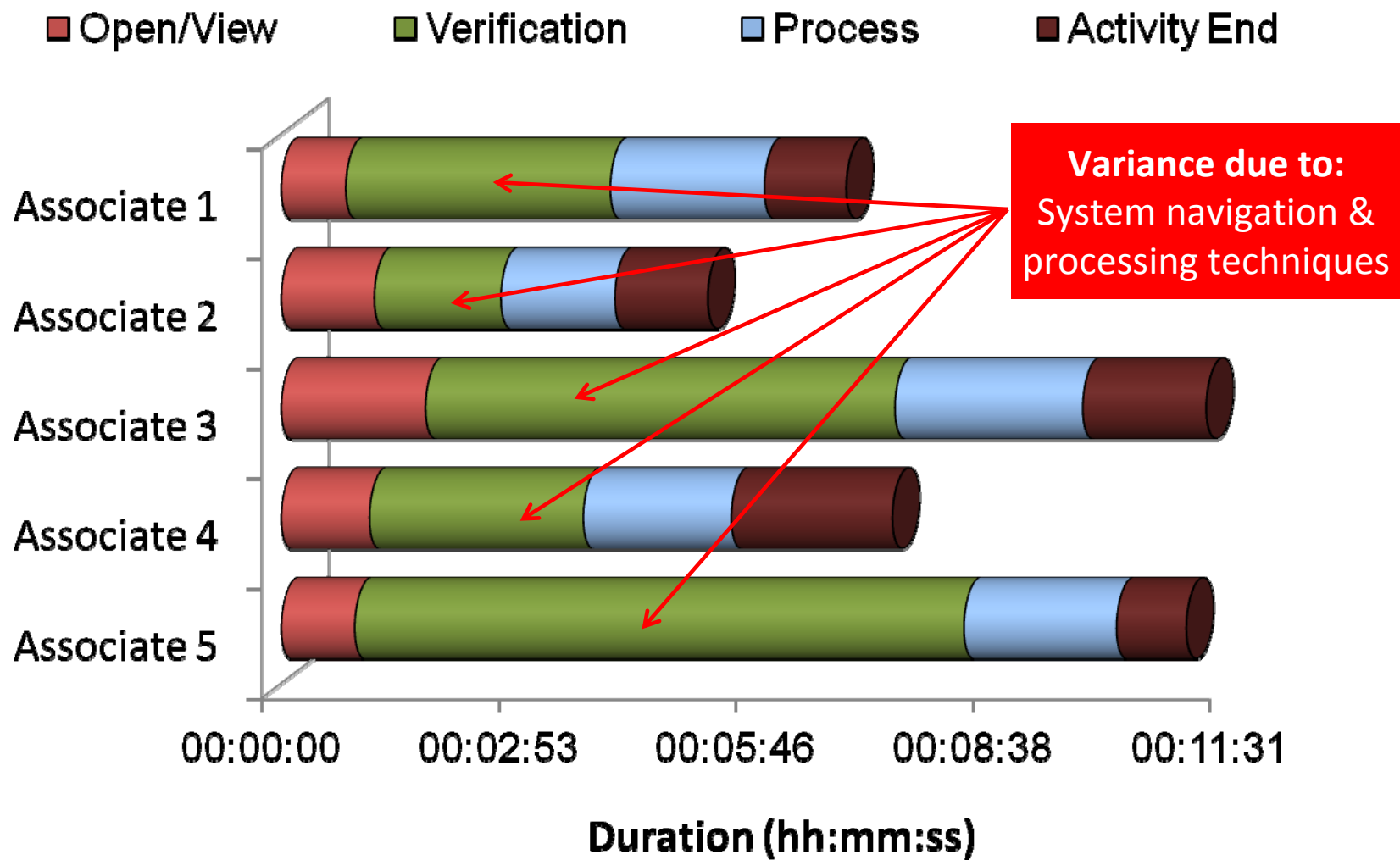
proprietary and confidential
for more information please visit www.maprockconsulting.com

Process Analysis can take numerous forms.
Here are a few examples: Activity analysis

Activities	Time (hrs)	Check	Transport	Operation	Wait	Storage
Email request in inbox	4				■	
Prepare quote request	2			■		
Send to manager for review	0.5		■			
Review quote for errors	1	■				
Take paper back to originator	1		■			
Prepare paperwork for client	2			■		
Follow up client	4				■	
Submit order	0.5			■		
Await confirmation of order	1				■	
File confirmation	0.5					■
No. of tasks	10	1	2	3	3	1
Cycle time (hrs)	16.5	1	1.5	4.5	9	0.5
%	100%	6%	9%	27%	55%	3%

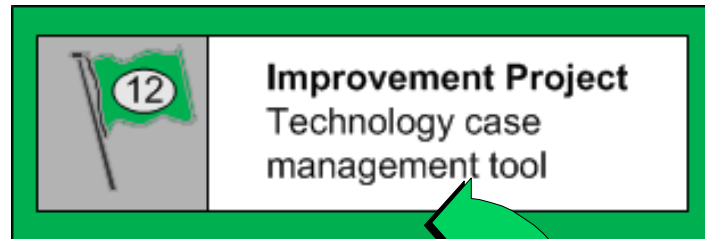
67% of time spent on NVA activities

Process Analysis Example: Resource variation

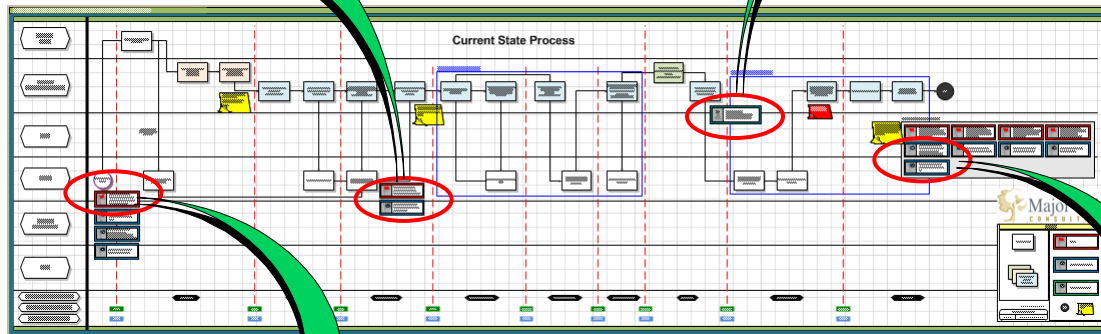
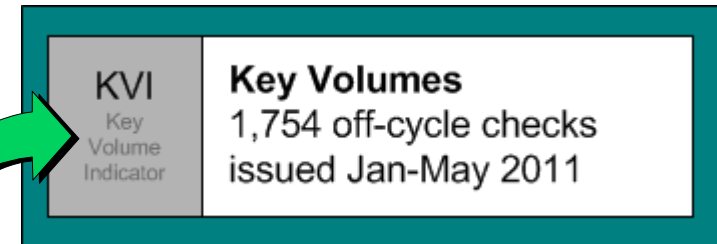


Now annotate the map, highlighting issues, opportunities, best practices and potential projects

Improvement Projects

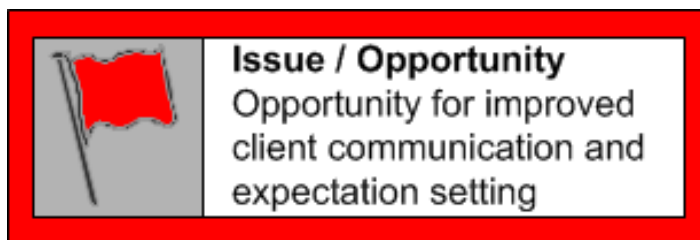


Key Volumes

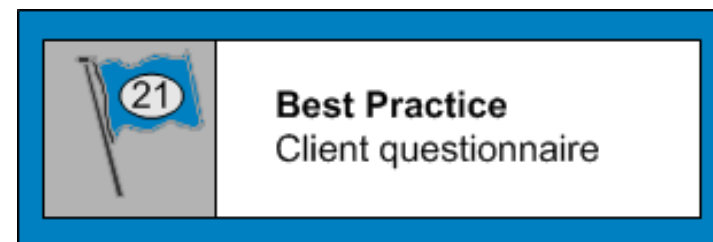


Advanced Technique:
Color code activity boxes to highlight activity sub-characteristics (manual, fax, regulatory, etc.)

Issues / Opportunities

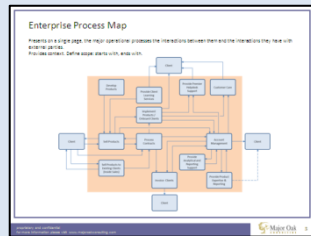


Best Practices



Phase 1

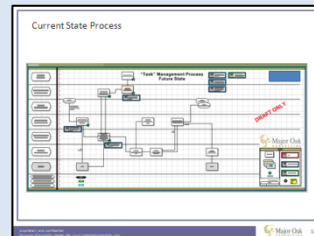
Enterprise Overview



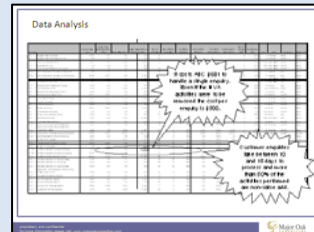
Enterprise Process Map

Phase 2

Current State Mapping



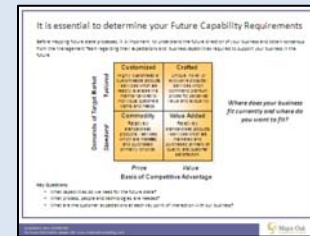
Current State Process



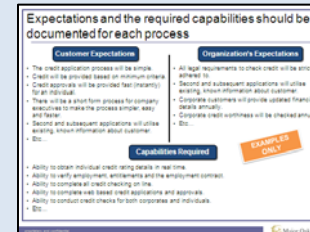
Data Analysis

Phase 3

Capability Requirements



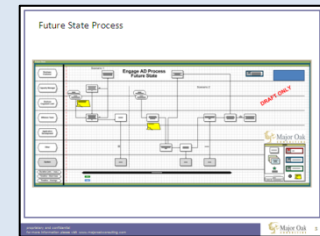
Future Directions



Capability Requirements

Phase 4

Future State Design



Future State Process

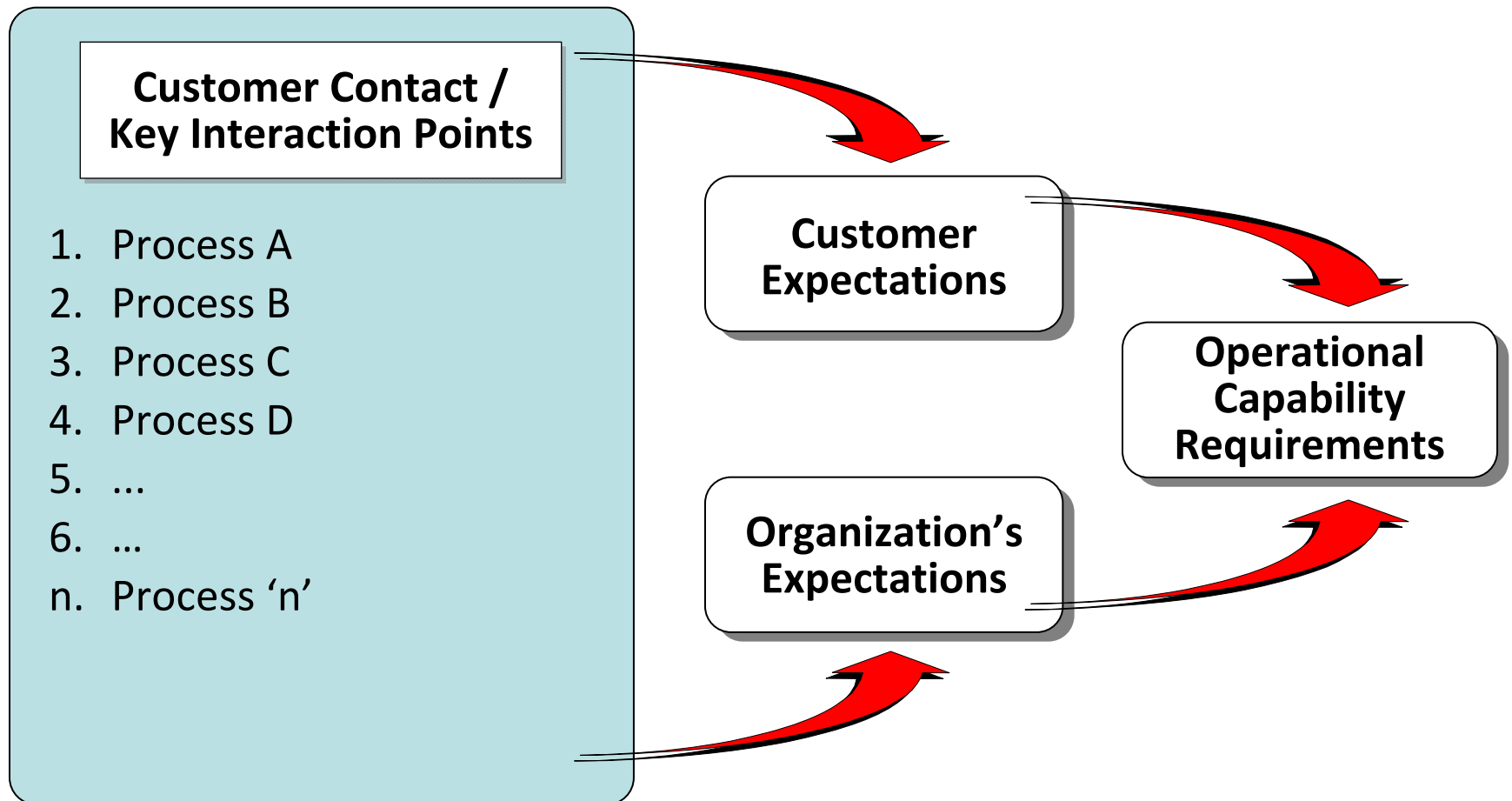
Capability Requirements must be determined before mapping your Future State Processes

Before mapping future state processes, it is important to understand the future direction of the business and obtain consensus from the Management Team regarding their expectations and business capabilities required to support the business in the future.

Key Questions:

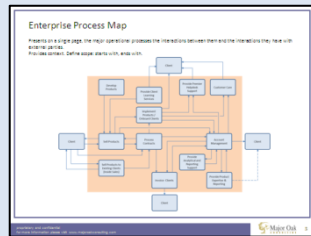
- 👤 What capabilities do they have today?
- 👤 What capabilities do they need for the future state?
- 👤 What process, people and technologies are needed?
- 👤 What are the customer expectations at each key point of interaction with the business?

Determine expectations at each customer interaction point and the capabilities required to meet them



Phase 1

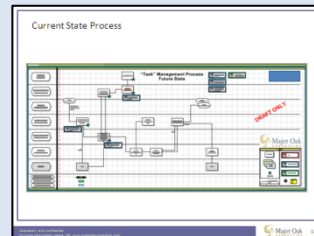
Enterprise Overview



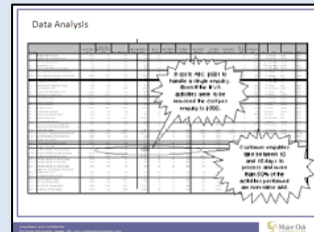
Enterprise Process Map

Phase 2

Current State Mapping



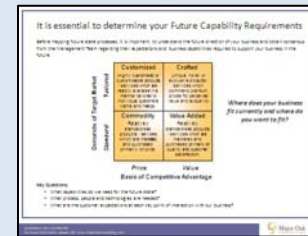
Current State Process



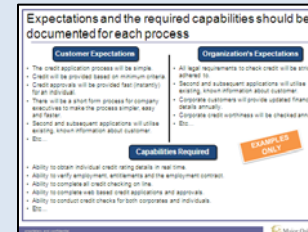
Data Analysis

Phase 3

Capability Requirements



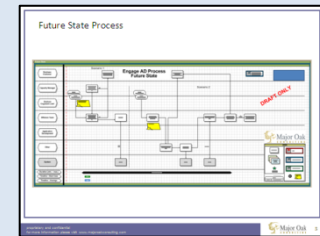
Future Directions



Capability Requirements


Phase 4

Future State Design



Future State Process

Future state mapping transforms from what actually happens to what should happen

 A future state map focuses on what SHOULD happen in a process by asking the following questions:

Future State Process Mapping

1. Who should perform each task?
2. What should be the specific tasks?
3. What should be the decision points?
4. Who is the customer(s)?
5. Who are the stakeholders?
6. How should we resolve the issues with the current process?

Future state maps typically begin with the current state, but starting with a blank page can be powerful

Start your 'ideal' state process map with one or all of the following techniques:

- 🧠 Use your current state process maps and analysis to identify non-value add steps

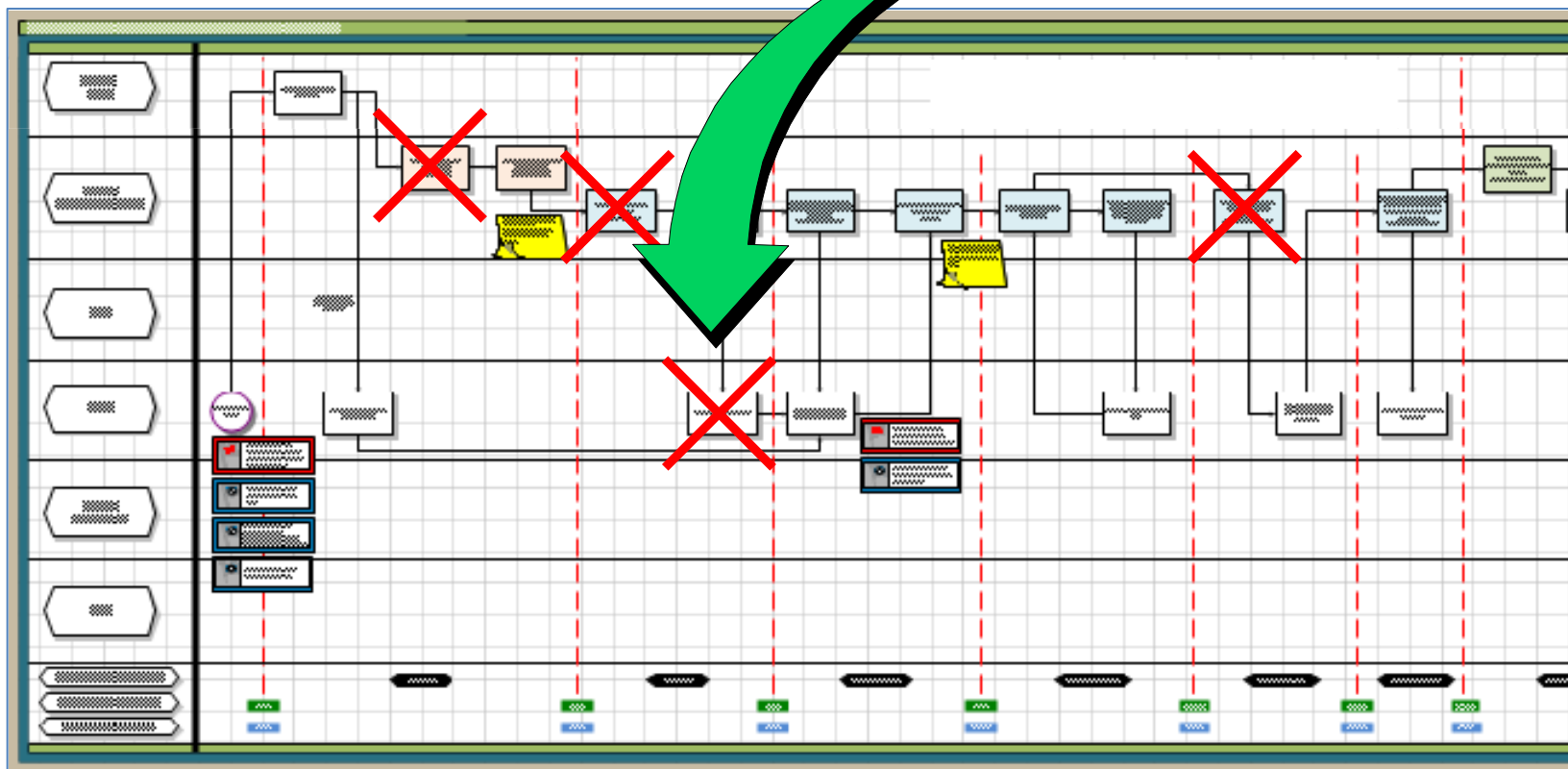
- 🧠 Re-sequence / amend the existing activities to streamline the process

- Consolidate activities to one role where possible to minimize hand-offs

- 🧠 Brainstorm fresh ideas from scratch (sticky notes!)

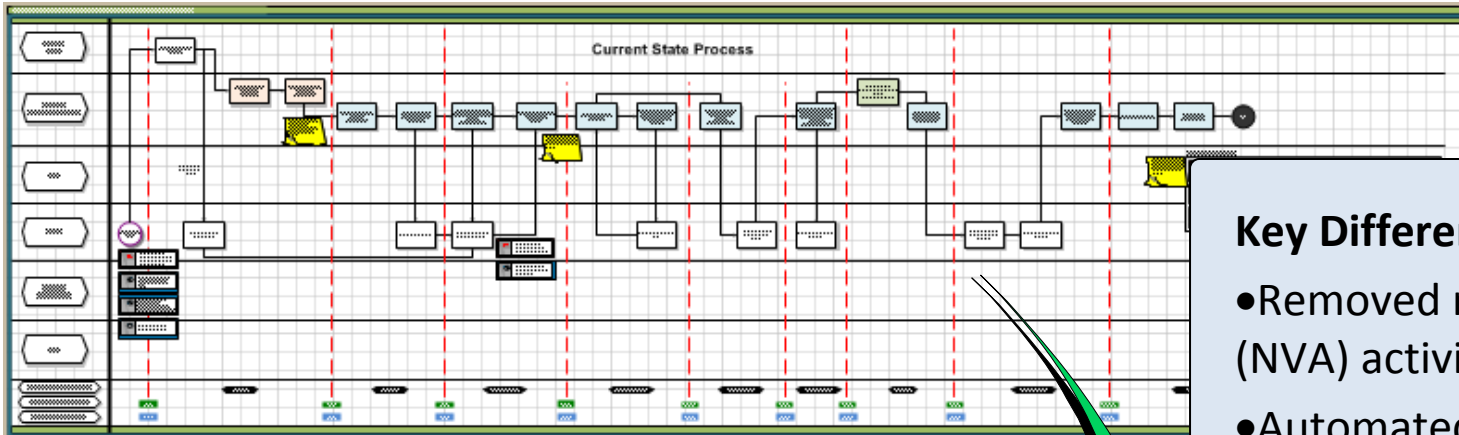
Identifying non-value add steps in the current state should involve all the relevant parties

Remove non-value add steps

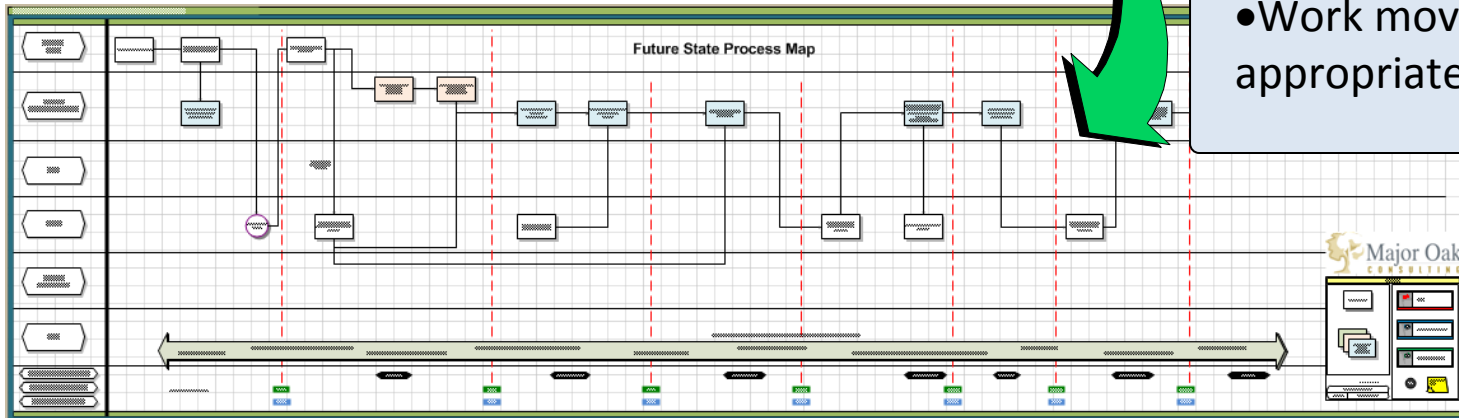


Ultimately, you'll have a future state process map

Current State



Future State



Key Differences:

- Removed non value-add (NVA) activities
- Automated steps
- Consolidated activities
- Work moved to the appropriate role

Wrap Up / Best Practices

Keep these Best Practices in mind when mapping within your organization

1. The people doing the work are **the best source** of realistic data
 - They are the factual authorities on that work – treat them with respect
 - To get the real story, remove “bosses” from room during process mapping
2. Generalities are the enemy of good process maps - push for specifics
3. Gather data with multiple approaches - explanation and demonstration
4. Quantify as much as possible – quantification = relevance
5. Validate the process map – multiple times if necessary
6. Swim lanes make the map much more relevant
7. Capture process exceptions, but don't map them
8. Real test is if the process map is vouched for by those doing the work
9. Break the process down into sub-processes wherever possible
10. The timeline tells a whole story in itself
11. Use flags, notes, colors and other visuals in your process maps

Questions?

Speaker Information

Thank You!

Please Complete an Evaluation Form.....

Loretta Britt Horvath

Vice President

Major Oak Consulting, LLC

lbritt@majoroakconsulting.com

516-551-7488