Exercise 6: What is Process Mapping? (45 minutes)

Objectives
- To use diagramming to understand the process you currently use.
- Provide basis for improving institutional decision processes and/or quality of services.
- Learn a basic technique for exploring the causes of inefficiencies, bottlenecks, and non-value added steps.

Inputs
- One of the most critical key issues that emerges from Exercise 4 & 5, OR
- A process that does not exist that your team would like to develop to support the Opportunity for Improvement.
- Appropriate Symbols and Sample Process Map.

Terms & Definitions
- **Process** - a logical series of related activities that converts input to results or output

  *Work process* - A chain of logically connected, repetitive activities that utilizes the organization’s resources to refine a process for the purpose of achieving specified and measurable results for internal or external constituents.

Appropriate Symbols
- Start with the basic symbols:
  - **Ovals** show input to start the process or output at the end of the process.
  - **Boxes or rectangles** show task or activity performed in the process.
  - **Arrows** show process direction flow.
  - **Diamonds** show points in the process where a yes/no questions are asked or a decision is required.
  - **Modified rectangle** shows a document.
  - **Parallelogram** for data
    - Usually there is only one arrow out of an activity box. If there is more than one arrow, you may need a decision diamond.
    - If there are feedback arrows, make sure feedback loop is closed; i.e. it should take you back to the input box.
Tasks

Constructing a Process Map

- Assign one member of the team to be the “Scribe”.
- Review Appropriate Symbols above and Sample Process Map for visual of symbols.
- Take a minute to collectively discuss the process being mapped or the new process being developed.
- First map the current state process and then the future state (improved) process.

Steps

Step 1: Determine the Boundaries

1. Where does the process begin?
2. Where does the process end?

Step 2: List the Steps

1. Using the appropriate diagram post-it notes, team members will document the tasks or steps of the current process. Use a verb to start the task description.

Step 3: Sequence the Steps

1. The team “Scribe” will document the task or steps on the poster board with the diagram post-it notes so you can move tasks if necessary.
2. Do not use the arrows until later. Completely document the process before connecting the steps with arrows.

Step 4: Finalize the Process Map

1. Ask the team: Is the process as systematic as it should be?
2. Ask the team: Are people following the process as charted?
3. Ask the team: What is redundant or what is missing?
4. Ask the team: Do we have consensus?

Outputs

- A process map of the current process and then future process you have identified for improvement
Sample Process Map

An oval is used to show the input to start the process or the output at the end of the process.

A box or rectangle is used to show a task or activity performed in the process.

Arrows show direction or the flow of the process.

A diamond shows those points in the process where a yes/no question is asked or a decision is required.

Yes

There is usually only one arrow out of an activity box. If there is more than one arrow, you may need a decision diamond.

No

Make sure every feedback loop is closed, i.e., every path takes you either back to or ahead to another step.

An oval is used to show the input to start the process or the output at the end of the process.
Exercise 7: Mapping Strategies for Change (1-hour)

Objectives
- Define actions required to meet your challenge
- Expand on the major ideas developed for the vision to develop increased levels of detail in designing process change.

Inputs
- Category Improvement Worksheet Pre-work
- Outputs from Exercises 4 and 5 where team members identified the current state and vision in the left and right panels of the Category Improvement Campaign Chart
- Flip charts and Post-it notes

Terms & Definitions
- Tree Diagram: To break a broad goal down into increasing levels of detailed actions which could be done to achieve the goal. The participants may start with brainstorming to attain the major task areas or means by which to achieve the goal.

Tasks
1. Identify one of the goals identified in the vision statement and briefly brainstorm four or five actions that can be undertaken to attain that goal.

2. Use Post-it note to document the goal and a note for each major action to be undertaken.

<table>
<thead>
<tr>
<th>Goal</th>
<th>Major Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Increased Industry Participation</td>
<td>Expand Internships</td>
</tr>
<tr>
<td>Restructure Program Advisory Councils</td>
<td></td>
</tr>
<tr>
<td>Seek Equipment Donations</td>
<td></td>
</tr>
</tbody>
</table>
3. Each of the major action headings is broken down into greater detail.
   a. Work from the goal statement and then the first-level detail, placed either to the
      extreme left or right or top.
      i. Then ask, "What needs to be addressed to achieve the goal statement?"
      ii. Keep repeating this question as the team burrows down to an increased level of
           detail.
      iii. Trees are most often broken down to the third level of detail. The drill-down
           should end where there are specific assigned tasks or the team does not have the
           information necessary to move farther.

4. Review the Tree Diagram to be sure that it is complete and that the steps appear to provide a logical
   sequence.
   a. At each level ask:
      i. Is there something that we have forgotten?
      ii. Do I really need to do this task to achieve the goal?
      iii. Will this action really provide what I need to achieve the goal?

5. Draw lines connecting the tasks and developing the tree.

6. Repeat steps 1-5 with the other high-level actions.

7. The team should then transfer the ideas that capture the group's best thinking into the center panel of
   their Category Improvement Chart.
Outputs

- Creative list of potential strategies for improving the selected Category

- Understanding of the uses and benefits of using a tree diagram to creatively generate ideas and organize actions with increasing levels of specificity to attain a goal.