Process Mapping: Tools and Techniques
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What is process mapping?

- process mapping is the task of defining what exactly a business does, who is responsible, and what is the standard by which the success of a business process can be judged.

Why is process mapping important?

• **Onboarding new employees.** Having a set of documented processes for new employees to follow can shorten training time, put less strain on other staff members, and help to ensure consistency and continuity of output.

https://www.smartdraw.com/business-process-mapping/
Why is process mapping important?

• **Communicating processes to others.** At times it is necessary to be able to show a process to others. The visual structure of a business process map makes it easier to understand the process without having to read (and try to comprehend) a long, narrative description.

https://www.smartdraw.com/business-process-mapping/
Why is process mapping important?

• **Process improvement and re-engineering.** Once a process is documented and understood, it can be analyzed to improve efficiency.

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Steps Involved in Business Process Mapping

• Identify the process you want to document
• Gather information from process participants via interviews or observations
• Identify the start and end points of your process
• Break the process into distinct tasks and decision points

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Basic Components of Business Process Mapping

• **Process.** The overall workflow from a starting point to its successful completion.

• **Tasks or Activities.** Something performed by a person or a system.

• **Flows.** This is indicated on the process map by connecting lines and arrows.

• **Events.** These are triggers that cause a process to begin, end, or may redirect a process to a different path.

• **Gateways.** Decisions that can change the path of the process depending on conditions or events.

• **Participants.** Specifically naming the people or systems that perform the tasks or activities.

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Primary Objective of Process Mapping: Visually display what happens in a process.

- Top Down Flow Chart
- Simple Process Flowchart
- Swim Lane Flow Chart
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Graphic symbols represent the nature and the flow of the steps in a process:
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Enterprise Process Map for making a deposit using graphic symbols:
Top Down mapping generally does not use graphic symbols and is defined by starting and stopping points, milestones and the how to of the process.

- **Procedure:**
  - 1st: Define your starting and stopping points.
  - 2nd: Define the milestones (the what’s)
  - 3rd: Complete your drill down (the how’s)
Example of a Top Down Process Map:

**Bob’s Morning Ritual**

**Process Name:** My Morning Ritual

1. **1.0 Wake Up**
   - 1.1 Hit snooze alarm
   - 1.2 Open one eyelid
   - 1.3 Get up
   - 1.4 Stumble to bathroom
   - 1.5 Start shower
   - 1.6 Let warm up
   - 1.7 Get into shower

2. **2.0 Wash Up**
   - 2.1 Rinse body
   - 2.2 Wash hair
   - 2.3 Wash Body
   - 2.4 Shave face
   - 2.5 Finish shower
   - 2.6 Dry off
   - 2.7 Brush teeth
   - 2.8 Do hair

3. **3.0 Get Dressed**
   - 3.1 Hang up towel
   - 3.2 Put on clothes
   - 3.3 Put on shoes
   - 3.4 Check mirror
   - 3.5 Kiss wife ‘g’bye

4. **4.0 Travel**
   - 4.1 Make travel cup
   - 4.2 Leave house
   - 4.3 Get into car
   - 4.4 Drive to work
   - 4.5 Park car

5. **5.0 Arrive At Work**
   - 5.1 Walk to desk
   - 5.2 Drop off bag
   - 5.3 Make cup of tea
   - 5.4 Check email

**KEY LEARNING:**
Don’t have too many steps at the highest level – combine so that there are maybe 5 to 8 steps at the top. One benefit of Top-Down Flow Chart is the hierarchical view of process steps and ability to see a big picture.
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Top Down Mapping does not:

• Show who does what when.
• Does not show activity processing time.
• Does not answer what if’s.
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Example of Swim Lane Process Map- Enterprise Gating Process
A swim lane process map sometimes called a cross-functional diagram, is a process flowchart that provides more information on who does what than a top down. It can also be expanded to show times—when tasks are done and how long they take.
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In a **Swim Lane** processes are grouped by placing them in lanes.

1. Lanes can be either horizontal or vertical, depending on the process flow diagram.
2. Each lane is allocated to an actor or group of actors.
3. Process steps which are performed by one an actor or group are drawn in that person's lane.
4. Arrows provide directions for hand off from lane to lane.
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Example of Swim Lane Map, Dr. John Grout, Campbell School of Business

Swim Lane Process Map*

* Adapted from map by John Grout, Campbell School of Business, Berry College, Mount Berry, Georgia
Swim lane maps take more time to develop.

- Help identify time traps—which processes take the longest—as well as capacity constraints, or which resources get bogged down because of work.

- Ideally, after identifying the current process, teams should try to map out a better process, based on the information provided in the diagram.
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• **A simple process flowchart** is probably the most versatile of the commonly used flowchart types and can be applied to virtually anything.

• **A simple process flowchart** shows inputs, activities, decisions and outputs of a process, partial process, or even a single process step. These are shown in a successive manner without denoting all the different functions within the concerned process.
Example of a Simple Process Flowchart: Cashing a Check
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Flowchart

Definition
A flow diagram of an algorithm or a process

Example
Fix the lamp