

# Process Mapping

LEIT 564: Performance Technology and Training  
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## What is it?

Process Mapping is the technique of using flowcharts to illustrate the flow of a process, proceeding from the most macro perspective to the level of detail required to identify opportunities for improvement. Process mapping focuses on the work rather than on job titles or hierarchy.

## Why Use It?

To allow a team or individual to identify the actual flow or sequence of events in a process that any product or service follows. Process maps can be applied to anything from the travels of an invoice or the flow of materials, to the steps in making a sale or servicing a product. They help address questions related to individual and team performance, quality of work life, and work design. Questions such as, “When do people perform best? worst? What types of errors are made? Why? Do people need more training, variety, information or power to do their jobs better and more easily? How can we design the work for the best speed, accuracy, efficiency, and enjoyment?”

Process mapping allows a team to picture the work itself outside of the organization’s hierarchy. The most common pictures of a person’s job(s) have been organization charts. Process maps help us picture the work *itself*, not the organization.

## What does it do?

Sometimes the first reaction to process mapping is, “These are just flowcharts. We’ve always used these.” Perhaps this is so, but oftentimes traditional flowcharts:

- are done only when a process is FIRST designed
- are done WITHOUT INPUT from those doing the work
- describe what someone THINKS happens, not what really happens
- are not used to examine the requirements of BOTH people and workflow
- are not used to look for performance BREAKTHROUGHS

Process mapping can:

- show unexpected complexity, problem areas, redundancy, unnecessary loops, and where simplification and standardization may be possible
- compare and contrast the actual versus the ideal flow of a process to identify improvement opportunities
- allow a team to come to agreement on the steps of the process and to examine which activities may impact the process performance
- identify locations where additional data can be collected and investigated

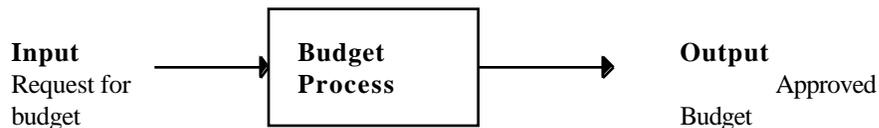
## How do I do it?

Choose a process that EXISTS TODAY.

1. Determine the frame or boundaries of the process.
  - a. Clearly define where the process under study starts (INPUTS) and ends (OUTPUTS)
  - b. Determine the level of DETAIL that must be shown on the map to clearly understand the process and identify problem areas

*The map can be a simple macro-flowchart showing only sufficient information to understand the general process flow, or it might be detailed to show every finite action and decision point. You may choose to begin at a macro-level and then choose which areas require added detail.*

2. Begin mapping at the most MACRO LEVEL. Don't feel too silly to start with a one-box block macro diagram like this:



3. Add DETAIL ON ACTIONS AND PEOPLE. This type of map is sometimes called a Relationship Map. (see example A attached.) A relationship map shows the steps in the process as well as who performs them. Relationship maps point out opportunities and probability of errors during transactions or “hand-offs.”

*To ensure your maps are accurate reflections of what is actually happening today, you may want to combine an observation technique called “shadowing” and a one-on-one interview technique. Shadowing, or following a person while they are completing the actions, may be sufficient if you are already familiar with the process. If you are not familiar with the process, you will likely need to interview the people involved to understand what they are thinking/doing during each action.*

*Process mapping can also be done in a group brainstorming session. Start by agreeing on steps 1 and 2 above. Then have the group brainstorm all of the actions that take place during the process. Use a post-it note for each step. Then, as a group, sequence the steps on a relationship map and add transactions, until the group is satisfied with the results. In most cases, this should still be validated with a shadowing or observation technique (if practical).*

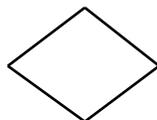
4. Use SYMBOLS to describe (map) the process.



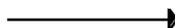
An oval denotes points where inputs enter or outputs exit.



Rectangles denote a process (action) step.



A diamond denotes a decision.



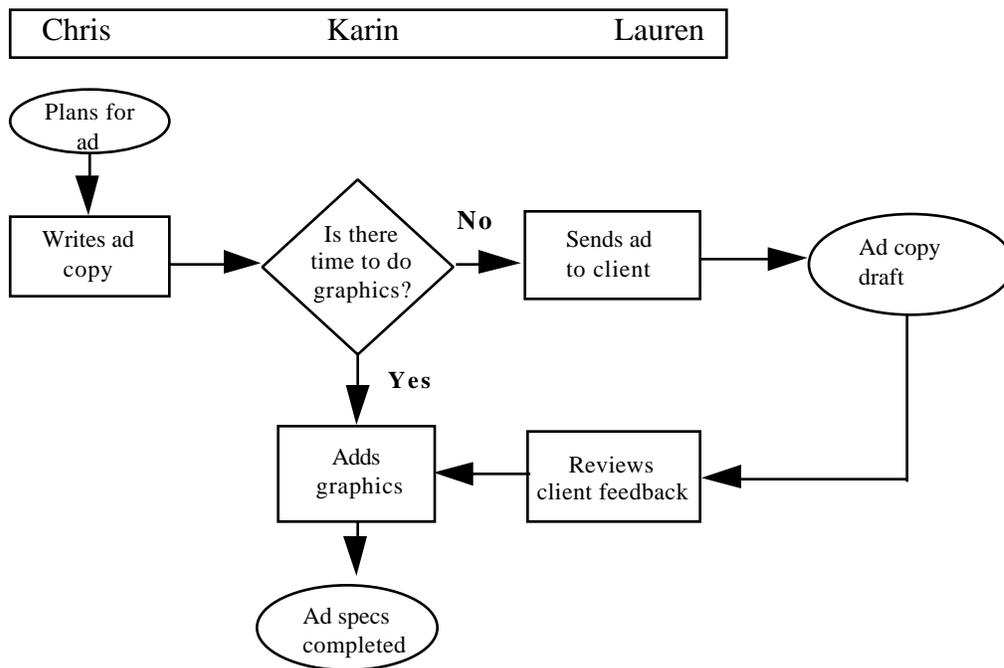
Arrows show the direction or flow of the process.

*Keep the map simple using the basic symbols listed on the previous page. Be consistent in the level of detail shown. (A macro-level map will show key action steps but no decision boxes. An*

intermediate-level map will show action and decision points. A micro-level map will show minute detail.) Label each process step using KEY WORDS that are clearly understood. Don't forget to title the map and date it (as processes have a tendency of changing sometimes on their own!)

5. Note suspected causes of variability (errors, time wasters, etc.) for inputs, actions, and transactions. (see example B)
6. Brainstorm suggestions for process improvement.

### Examples:



See Examples A and B attached.