Process Map Instructions

A process map — also known as a “flow chart” — is a visual representation of the sequence of steps in a process. Understanding the process as it currently operates is an important step in developing ideas about how to improve it.

**HOW TO BEGIN:** Many teams may have experience with process mapping, and for some teams this may be new. The following information will give us a common framework within the practicum.

1. **Assemble a team**: Select no more than 8 people who are very familiar with the process.
   * **TIP**: Identify and involve all key people involved with the process at the beginning – planning ahead enables you to give people plenty of notice. This includes those who do the work in the process and if possible, families. If certain individuals can’t participate in creating the process, involve them by interviewing them before the sessions and/or by showing them the developing process map between work sessions and obtaining their feedback.
2. **Gather your materials.** Using the right materials to physically produce the process map makes life easier. Computer software is available for drawing process maps. Software is useful for drawing a neat final process map, but the method given here works better for the messy initial stages of creating the process map. Some suggested materials:
   * Paper (flip chart paper or other paper you can stick to wall with tape or blue tack)
   * Marker pens
   * Post-it notes - These are so helpful as you move action steps around
   * Flip charts (to display the ground rules, hold ideas or issues to be discussed at a later date)
3. **Select the boundaries of your process**: Each process has a beginning and endpoint. This is important so you can stay on track and not tackle too much at once.
4. **Brainstorm the main steps of the process.** Write each on a card or sticky note. Sequence is not important at this point, although thinking in sequence may help people remember all the steps.
   * **TIP:** Decide on the level of detail before you start brainstorming the steps of the process. This is sometimes difficult to determine however; a rule of thumb is to start broad and then work down to detail in subsequent revisions. Many teams have experience in creating process maps, and for others this will be a new activity. If your team is experienced and has already created a process map for your process, then take this opportunity to add more detail. For those teams new to process mapping, start with a higher-level process map.
   * **TIP:** Map what actually happens in the current process rather than what you would like to be happening, or what should be happening according to policy or expected standards of practice. It’s tempting to process map what you WISH the process flow should be, but focusing on your current process will allow you to begin to identify gaps, or problems in your process: missing stakeholders, poor connections, or unclear steps.
5. **Arrange the activities in proper sequence**: Use the process map symbols below to outline the process steps. Beginning and end steps are written inside circles, process steps are written inside squares, and decisions are written inside diamonds.
   * **TIP**: Don’t worry too much about drawing the flow process map the “right way.” The right way is the way that helps those involved understand the process. The team exercise of building the process map and seeing the process globally are the factors that are critical for success rather than what the actual process map looks like in the end.
6. **Process map the flows and interconnections**: When all activities are included and everyone agrees on the sequence of activities, draw arrows to show the flow of the process.
7. **Reflect**. Reflect as a group on 2 questions:
   * Are there areas or steps where the process is unclear? If there is a step where different team members have different understandings or opinions about how it works, that step is likely not clearly defined. Put a cloud around these steps.
   * What are the differences between the ideal process and current process? Take some notes.
8. **Observe (optional).** Observe the process (at least once) that you selected to map from the perspective of your client. If this isn’t possible, do a simulation and make it as real as possible to try to learn about the client’s experience. Write down key learning using the table below.

|  |  |  |  |
| --- | --- | --- | --- |
| Positives | Negatives | Surprises | Frustrating/Confusing |
|  |  |  |  |

**Commonly-Used Symbols in Detailed Flow Process maps:**

