

## Current State Mapping Tips

### Why Process Mapping:

- Highlight problem areas
- Compare and contrast the **actual** versus the **assumed** flow
- Goal: The current state map reflects *agreement* among process owners.



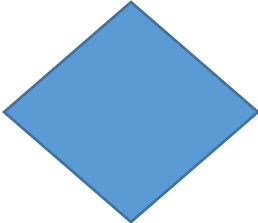


### Planning for Process Mapping:

- All individuals who touch the process at any stage should help create the process map.
- Interview or observe people performing the process.
- Make arrangements:
  - Space suited for producing visual chart on walls
  - Communicate with team
  - During mapping, have a refrigerator to capture brainstorm ideas, helps maintain *focus* and begins to identify *future* state
- As a facilitator:
  - Ask questions
  - Guide group towards an outcome
  - Remain neutral

Probe to achieve an understanding of the entire picture of the **work** being performed.

- **What** is happening? (customer calls?)
- **When** it is happening? (day of week, year?)
- **How often** is it happening? (30 applications/week?)
- **Who** is doing it? (function or title?)
- **Where** it is happening? (building location?)
- **How** is it being done? (manually or online?)
- **How long** does it take? (actual task itself?)
- **Why** is it being done? (to verify correct info?)

## Flowcharting

Flowchart Symbols		
Oval		Beginning and ending steps in a process
Rectangle		A description of a process step or activity, including a verb
Diamond		A decision or "if/then" point in a process where the process splits into one of two directions depending on the circumstances
Connector		A place where a process jumps to another place in the process
Arrow		The direction of the process flow

### Flowcharting Tips:

- Map from left to right
- **Identify the beginning and end steps first**
- Identify who owns/completes each step (the title of position- NOT the person's name!)
- Label the chart! (include: Process Title, Date flowchart completed, who was involved)
- Process can occur at the same time, with one process shown above or below the other
- Utilize different colors to help identify different workgroups and individuals; waste
- **Never flow alone.** Involve the people that conduct the process- not just the people that manage it.

**REMEMBER:** You're not going to break anything! Strive to ensure the process map is accurate and reflects the work that is actually done **CURRENTLY!**

Step	Key Point	Reason	
<b>Prepare to Flowchart</b>			
1	Determine the scope of the flow chart	Stating the first and last steps in the process aids in setting the scope	It is easy for scope creep to occur in a flowcharting effort if the beginning and ending boundaries are not defined up front
		Determine who needs to be included in the flowcharting effort based on the defined scope	Those who actually perform the work are the best ones to get an accurate depiction of how the work actually occurs
<b>Draw the Flowchart</b>			
2	Place the first step in the process in an oval	The oval shape indicates the beginning or end step of a process	Using standard flowchart symbols helps communicate reliably to those who read the flowchart
3	Place each subsequent step in the process in a rectangle	Steps may be run vertically or horizontally on the page	
4	When a decision point is reached, write a binary question in a diamond and develop the two paths from the decision	A binary question may be yes/no or any other question where the answer is one of two options	By convention decision points only have two paths so that the chart is easy to follow
5	Place the ending step in the process in an oval		The oval signifies the end of the flowchart