ONTASK

A Blueprint for Process Mapping

Introduction

Workflow automation is one of those business buzzwords you probably hear all the time, but might not totally understand. That's okay, we get it - from BANT to CAN-SPAM to ROI, you have enough lingo to learn in today's business environment. But the reality is, if you really want to improve your business processes and increase your bottom line, you should probably listen up. Workflow automation, by definition, replaces manual and paper-based processes with digital solutions to make sure that the right people get the right information at the right time. It is the automation of predictable and repeatable steps to create consistency and increase efficiency.

Workflow automation is exciting, and we're all eager to build a better workplace, right? But in order to create the most effective workflows, you will need to start with process mapping. What is process mapping? We thought you'd never ask. Process mapping involves creating a visual representation - a blueprint, if you will - of the steps, stakeholders, and information that makes up a process. Mapping out all of this information can help you to review and audit how your current processes are conducted and how they can be improved. This provides visibility into inefficiencies that can be eliminated before adding automation and perpetuating the problems. Ready to get started? Let's dig in.

Getting Started

Just like you would create a blueprint before building a house, process maps should be created before building an automated workflow. Initially mapping out your process forces you to hold a magnifying glass up to the way your organization operates and break it down into manageable pieces for review. You'll need to determine the specs of the process by asking questions like, "How do we accomplish this? Is this really the best way it should be done? What are the boundaries of this process (where does it start and end)? How many people should be involved? What is the time frame or frequency? What does the end goal look like?"

The best way to pick a process to start with is by taking stock of all the processes at your organization and creating an inventory list. From time off approvals to tax forms, every organization is bogged down by manual processes that distract them from their core business. While you may feel like you have a good grasp on your processes, when you actually take the time to write them all down, you might be surprised by just how many there are to be addressed. If you feel like you don't have enough insight into all areas of the business to create a comprehensive list, consider scheduling meetings with department heads to break down their day-to-day activities. Identifying these processes and prioritizing them in terms of urgency will help you get off to a strategic start.

Now that the foundation is set, it's time to bring in the crew and get to work.

Process map in 3,2,1….

There are 3 key steps to take to map your processes before implementing workflow automation.

STEP 1

SKETCH OUT THE STEPS

Get your pencil- it's time to sketch. At this stage, you'll want to start visualizing the high-level steps that take place throughout the process. Make sure to gather and include all relevant stakeholders to help you complete the sketch and ensure your process map reflects reality. Have an open discussion about how the process plays out from start to finish to get everyone aligned. You'll need to understand the order of the key stages in the process and where the handoffs between people or departments take place. Keep in mind that, at this stage, the sketch should reflect the "as-is" state of the process, not the "should-be". That will come later. This first step is critical to getting alignment and creating transparency into the inefficiencies of current processes and opportunities for improvement.

STEP 2

ADD THE DETAILS

Once you've sketched out the 30,000 ft view of your process, it's time to zoom in and fill in the blanks. Details like participants, inputs, and problems add color to the process and help it come to life. This provides the utmost clarity for showing detailed connections and the proper sequence of events. If possible, try to also provide expectations for time limits at each stage so all team members are clear on how fast this process should pass through the workflow.

PEOPLE

Understand the key stakeholders, including internal and external participants, facilitators, and approvers that will play a role in the process. There should be at least one person responsible for moving each step in the process along. Be sure to use roles or job titles, not departments or actual names. This will help the process maintain longevity as it won't be attached specifically to particular employees.

INPUTS & OUTPUTS

Inputs refer to documents, forms, or other information that would need to be input by one of the stakeholders at each stage, such as proposal quotes or time off requests. Outputs would be documents or information that are entered or enhanced, think signed contracts or completed forms. To ensure accuracy, these specifics should be gathered through conversations or interviews with the identified people involved. Inputs and outputs can also refer to other software systems, like your CRM or Document Management System, that would need to be involved or integrated.

PROBLEMS

Through interviews, discussions, and observations from Step 1, this is the stage where you should begin to identify common problems or complications that occur throughout current processes as they stand. Mark up your original sketch to include these and note them in the correct stage at which they occur. You may also consider adding more details like severity and frequency. Stakeholders may bring up problems or issues that are not severe, or happen very infrequently, and might not warrant a process re-design.

STEP 3

BUILD & IMPROVE

Now it's time to gather your tools and start building. Considering the initial sketch you completed in Step 1, along with the details you collected in Step 2, you're ready to move beyond the current process and begin to build out the new process as it should be, and as it will be activated through workflow automation. This final map, or blueprint, should incorporate feedback from stakeholders and work to optimize current processes before implementing a workflow automation system. This map should also keep in mind the context of what you are trying to achieve by automating this process. Are you hoping to save time? Increase accuracy? Reduce paper? All of the above? How will your proposed solution achieve this goal?

Sample improvements include:

- Evaluating value-added activities
- Eliminating redundancy
- Simplifying process reports and forms
- Reducing cycle time
- Eliminating bureaucracy

Identifying those improvement goals and executing accordingly can help ensure that all of your business processes are driving value without sacrificing unnecessary time and money. Once implemented, your process should continue to be monitored and tracked against its original goal. You may need to evolve the process over time to accomodate organizational changes and ensure that it is still driving efficiency. So, be sure to elicit regular feedback from stakeholders on any problems or opportunities for improvement.

How Can Workflow Automation Work for You?

Now that you know the steps to take to map out and improve processes, you'll want to start thinking about how to put this knowledge into action to improve your organization. What are some processes at your workplace that always elicit a groan from staff? Is it sales contract management? Time sheet tracking? Or worse, the dreaded employee performance appraisal process?

Every business experiences headaches from manual, time-consuming processes. Embracing workflow automation can eliminate these frustrations and incite a digital transformation across all departments at your organization. However, your automation efforts can only be truly optimized by first executing process mapping exercises. Executing the steps throughout this eBook can help establish a new mindset at your organization that positions business process improvement as an ongoing initiative, where continuous evaluation and feedback drive long-term efficiency and effectiveness.