

WORKFLOW MAPPING

Workflow mapping is a relatively straightforward process, but take a bit of time to ensure you have the process right. Below is a simple step by step guide to assist you in mapping out the process.

1

COLLECT INFORMATION

Gather information on the current process by interviewing people and/or making observations about how the process is conducted. Identify what tasks people undertake, how they undertaken them, how long they take to complete the task, and what resources they use to complete the task.

Ensure your information gathering is thorough and complete. In gathering the information determine where the process begins and where it ends. If a process has more than one possible end, ensure you understand this and collect information for all possible process scenarios.

2

LIST & ORDER THE PROCESS

Set up a table and list out the steps in the process, from start to finish. Try to frame it in terms of an action, i.e. fill out, submit, analyse etc. Also include the business rules and who is responsible when writing out your list.

Refer to example below.

There are other mapping techniques available, include flow diagrams etc. There are also online tools available to assist. Once mapped, ask others to review the map to ensure you have reflected it accurately.

PROCESS	BUSINESS RULE	RESPONSIBLE PERSON/DIVISION
1. Fill out expense form	Must be completed monthly	Employee
2. Submit expense form via email	Must be completed monthly	Employee
3. Line manager receives expense form via email	Must open form for review	Line Manager/Supervisor
4. Line manager reviews expenses and determines validity against policy	Must review expenses within 5 days of receiving them	Line Manager/Supervisor

3

ANALYSE AND IDENTIFY AREAS FOR IMPROVEMENT

Check the process for delays, bottlenecks, waste, double-handling or responsibility concerns and create tasks to help overcome or avoid them.

Business processes are designed to be performed optimally, that is: with efficiency, productivity and effectiveness. Ask yourself “How can I optimise this process?; Is there any technology that would make this process more efficient?; Is there an entirely different way to get this task done more effectively?”.

4

MAP IDEAL WORKFLOW

Following the analysis of the current workflow and where you have identified areas for improvement, map an ideal workflow where redundancies are removed, rework/rehandling is minimised, delays are reduced etc.

Test this ideal workflow with key people involved in the process to determine whether the ideal workflow resonates.

5

DETERMINE THE GAPS

Review the current and ideal workflows side by side, and list the process/ activities that have been removed from the current to the ideal workflows. Of the removed processes, determine what you would need to do differently to ensure you can still meet the required outputs.

For example, you have a process in which employees are required to monitor a piece of plant at regular intervals. They record the various functional parameters for that item of plant, record these parameters in an excel file, and the manually compare those parameters to the ideal parameters for the plant. If the parameters look like they are not within normal operational requirements, then the employee will alert the maintenance team, who will then inspect the plant and confirm whether the parameters are okay. In an ideal world, there would be no requirement for staff to inspect the plant, and instead maintenance personnel would simply be notified when parameters were such that failure was predicted.