Process Mapping Cheat Sheet

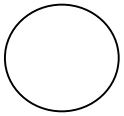
Step 1: Identify the process:

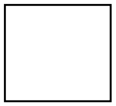
- What is done a lot (high-volume work)?
- Where and when have things gone wrong for clients or services; adverse events?
- Where are client outcomes less than desired or expected, based on the literature or experience?
- What do clients complain about?
- What creates problems for staff?
- Where are resources wasted?
- Where should evidence-based practices be in place where they currently are not?
- Where does the process start and end?
- What are the main process steps?

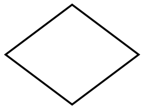
Step 2: Map the process:

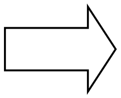
- Use newsprint and put each step on a sticky note to create an easily updatable map
- Map the process in sequence, including activities that happen in parallel
- Map the key processes that are marked for improvement
- Create a global map first – just the main steps, then fill it in with detail as necessary
- Involve key people at every level and from every department to make sure the map is complete
- Map what actually happens, not the ideal, including what happens when problems occur

Conventional symbols that represent different activities:


Oval – the start and end of the process


Box – the tasks or activities of the process


Diamond – a question that is asked; a decision is required


Arrow – the direction or flow of the process

Step 3: Analyze the process:

- How many steps are there?
  - How many steps add no value for the client?
  - How many people are involved?
  - Is there any duplication of work?
  - Are there any bottlenecks?
  - How long does each step take?
  - How long between each step?
  - Could any of the above be reduced?
  - What delays occur on a regular basis?
  - Where are there problems for the client?
  - What do clients complain about?
  - Where are there problems for the staff?
  - Which tasks add value? Which tasks do not?
- Are these the best steps for the process?

Step 4: Redesign the process:

- Review process map and identify services provided at each step and forms used
- Target and eliminate/streamline redundant or unnecessary steps
- Assess if staff activities are maximizing their expertise
- Define which activities or tasks can only be accomplished by a specific category of worker
- Determine what tasks can be shifted
- Rebundle activities to balance workload, minimize inefficiencies and enhance quality

- Is this the best order for the process?
- Is the right person doing each step?
- What information is given to the client at each step and what information do they need?
- How can best practices be implemented into this process?

Common Problems

- Waiting Delays
- Rework
- Excessive Handoffs
- Interruptions
- Many requirements for decision & approval
- Poorly defined requirements

Common Solutions

- Combine steps
- Manage interruptions
- Revise clinic hours
- Schedule staff when resources are needed
- Standardize process
- Build in quality checks
- Improve show rates
- Staff huddles