Current State Process Mapping
(Half Day Session)

Participant's Workbook

EXCELLENCE✦CANADA

improving performance, recognizing excellence | améliorer le rendement, reconnaître l'excellence

Contents

INTRODUCTION TO THE TRAINING COURSE

This Workbook is used to support the Current State Process Mapping Course (Half Day Session) classroom training course.

This Workbook is yours to keep. Please use it to record any notes you may take during the training session.

This course is part of the Excellence Certificate in Process Management program. If you are interested in learning more, please visit http://www.excellence.ca/en/knowledge-centre/products-and-tools/excellence-canada-certificate-in-process

Overall Course Goal

Introduce an approach to process mapping that will enable you to be more effective in managing processes in your organization.

Detailed Course Objectives

By the end of the training course, participants should be able to:

a) Define processes in terms of Suppliers, Inputs, Process, Outputs, and Customers

b) Identify, analyze and improve core business processes

c) Document the flow of a process from inputs to outputs and to provide a focal point from which to analyze opportunities for improvement

d) Map processes at three levels of detail (Level 1, 2 and 3 Process Maps).

Agenda

1. Introduction
2. What is a Process?
3. Process Mapping
   – Mapping Activity
4. Process Mapping for Improvement
5. Wrap-up

Excellence Canada

Founded in 1992 by Industry Canada, Excellence Canada (formerly the National Quality Institute) is an independent, not-for-profit organization that is committed to advancing organizational excellence across Canada. Since its inception, Excellence Canada has helped thousands of Canadian organizations across many sectors. As Canada's national authority on Quality and *Healthy Workplace*® practices, Excellence Canada has created a uniquely Canadian model, providing measurable standards for all Canadian organizations to strive for.

For more details, visit the Excellence Canada Website at www.excellencecanada.ca.

Mission Statement: To Help Improve Organizational Performance and Recognize Excellence

Vision: To Promote and Enable Excellence in Every Organization in Canada

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About the Canada Awards for Excellence

Patron for the Awards

His Excellency the Right Honourable David Johnston, C.C., C.M.M., C.O.M., C.D., Governor General and Commander-in-Chief of Canada

About the Awards Program

The Canada Awards for Excellence (CAE) is an annual awards program to recognize business excellence in quality, customer service, and workplace health. Since 1984, the Awards have been presented to private and public sector organizations of all sizes that are world class. This prestigious award is tangible evidence of an organization's level of excellence.

Definition of a Process

A Process is a series of <u>definable</u>, <u>repeatable</u> and <u>measurable</u> steps which transform some _____ from <u>supplier</u> into a useful result or _____ for an internal or external <u>customer</u>.

Definition of a Process	
Definable:	• can be described & documented
Repeatable:	
Measurable:	• either the whole process or each step
Input:	• raw materials or info used to start the process
Suppliers:	
Output	• the result of the process
Customer:	

Where does a process reside if it is not documented?

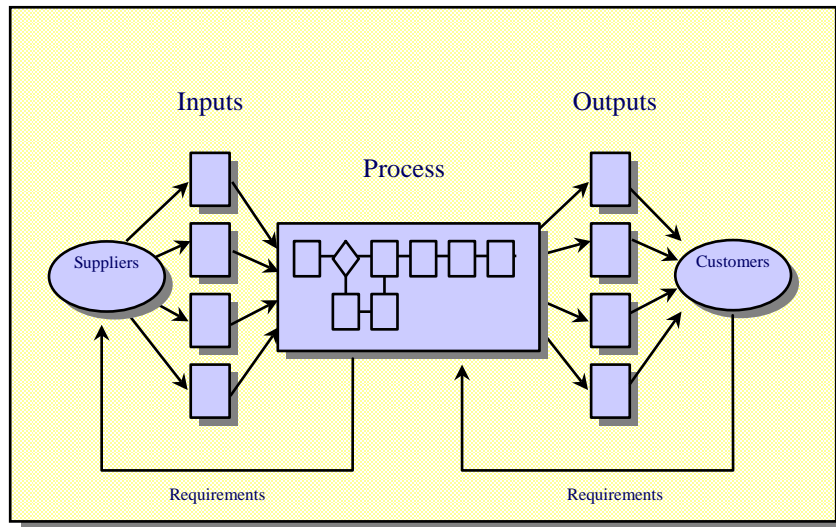| Can you think of an example of a process that is not repeatable? |
|---|
| |

Examples of processes from the class.

SIPOC

What does a process look like without requirement loops?

Examples of Requirements (and ways to gather them)

Optional: EXERCISE/ HOMEWORK

"Thinking About" your Customers & Suppliers

List anyone who you would consider to be your customer and your supplier in your organization.

Who is your customer? - User of Output	Who is your supplier? - Supplier of Input
Reflection on the list above	

Process Types

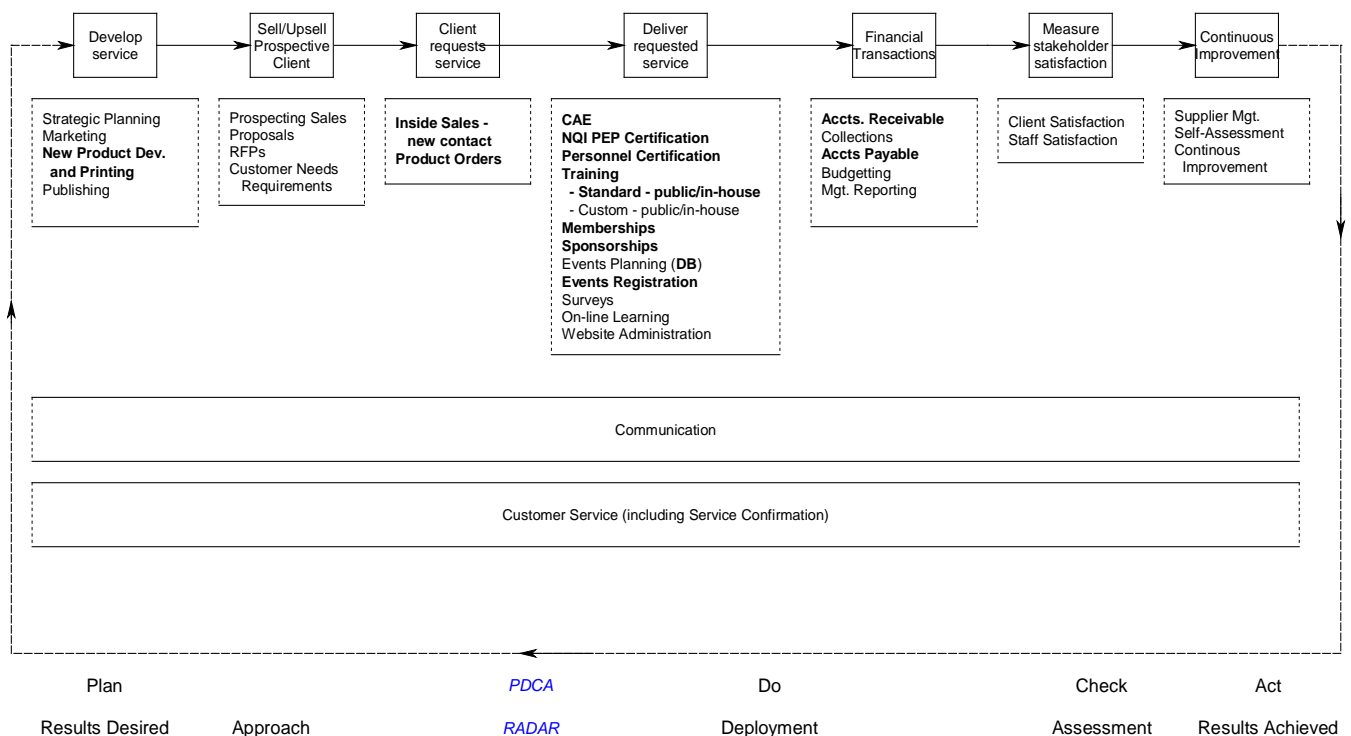| Customer Processes	Support Processes
Those that have a touch point with external customers. **General Examples** • Register for Events • Sell Products and Services • Process Claims • Dealing with customers on the phone	Those that have touch points with internal customers. **General Examples** • Hiring Employees • Reviewing Individual Performance • Determining Funding Strategy • Developing Annual Budgets

Key Processes – Those that have strong linkage to:
- Improvement goals in the organizations
- Meeting customer/client needs
- The business plan
- The mission and vision of the organization
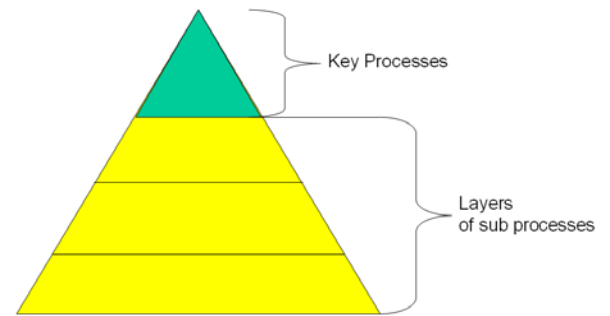
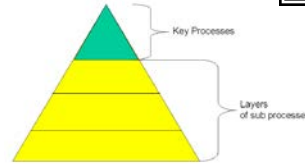Example: Excellence Canada has 9 Key processes

Develop service	Sell/Upsell Prospective Client	Client requests service	Deliver requested service	Financial Transactions	Measure stakeholder satisfaction	Continuous Improvement
Strategic Planning Marketing **New Product Dev. and Printing** Publishing	Prospecting Sales Proposals RFPs Customer Needs Requirements	**Inside Sales - new contact** **Product Orders**	**CAE** **NQI PEP Certification** **Personnel Certification** **Training** **- Standard - public/in-house** - Custom - public/in-house **Memberships** **Sponsorships** Events Planning (**DB**) **Events Registration** Surveys On-line Learning Website Administration	**Accts. Receivable** Collections **Accts Payable** Budgetting Mgt. Reporting	Client Satisfaction Staff Satisfaction	Supplier Mgt. Self-Assessment Continous Improvement

Communication

Customer Service (including Service Confirmation)

Plan		*PDCA*	Do		Check	Act
Results Desired	Approach	*RADAR*	Deployment		Assessment	Results Achieved

"Thinking About" your Key Processes

What is a key process for your organization?

List at least 1 key process for your organization that you are familiar with in the space below

Why Manage Processes?

- Focus efforts on customer satisfaction
    - Aligning efforts towards common objectives

- Improve processes
    - Optimizing process resources
    - Maximizing overall efficiency

- Synchronize process activities
    - Leveraging synergy
    - Avoiding sub-optimization

What is Leveraging Synergy?	What is sub-optimization?

PROCESS MAPPING

"If it works, it works.
if it doesn't work, it doesn't work.
Working harder at what doesn't work,
doesn't make it work."

Definition of a Process Mapping

A Process Map is a chart that shows how work flows through the functions in an organization. It captures and records how a particular input is processed by identifying each step required to convert inputs to outputs.

Why do Process Mapping?

- Promotes process improvement
- Creates a pictorial of the way we work "A picture is worth a thousand words"
- Gives employees a better understanding of how their work is linked to the duties of other employees
- It helps prepare to focus on Customer Identification (PEP Level One)
- It helps us understand and communicate several of your existing processes, and establish a baseline for improvement (PEP Level Two)

When do we use Process Mapping?

- You want to see which activities are done by each participant
- You want a broader understanding of what's going on
- You want to see the handoffs that occur between participants and functions
- You want to identify process issues such as rework loops, disconnects and unneeded steps
- Help a team come to agreement on how work is performed.
- Train people on how to carry out a job.
- Investigate where and why bottlenecks or errors might occur in a workflow, as well as redundant activities and wasted efforts.
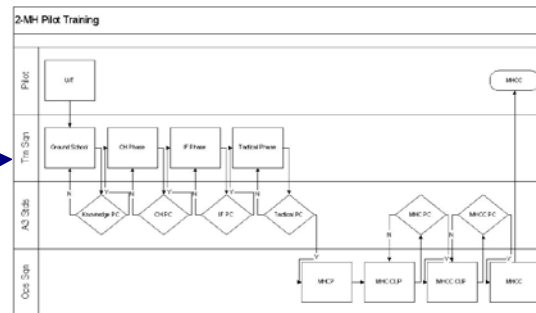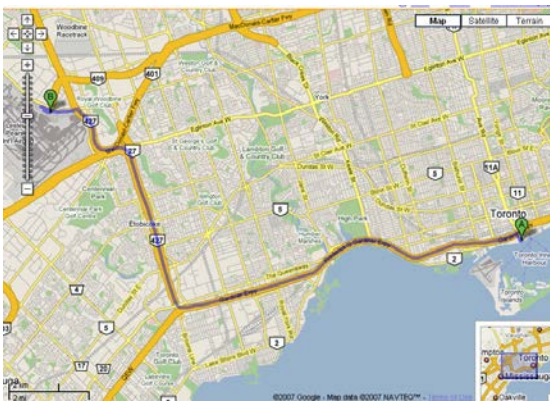- Help design a new workflow.

Why is now a good time for you?

Process Mapping 'Voice of the Process'

- It is critical to document your process in order to understand how it behaves.
- Process maps become the "voice of the process."

Uses for Roadmaps when we go on trips	How does this link with process mapping and processes?

## Some important notes on process mapping:

| Important note:	Reflection:
Most process maps uncover things you didn't know. There is an "ah-ha" that occurs when building them	
Should be an "as is" representation	
Are there for analysis, not just documentation	
Are created by asking the "experts"	
Can be at three levels of detail	

Process Mapping Levels

- **Level 1**
    - High Level
    - The "WHAT"

- **Level 2**
    - Shows process in more detail
    - The "WHO DOES WHAT"

- **Level 3**
    - Transactional Level
    - Sometime referred to as a Flow Chart
    - The "HOW"
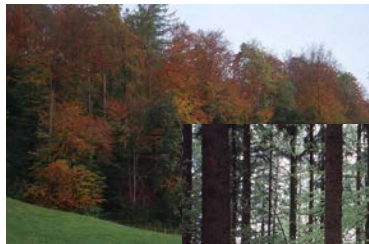
Forest
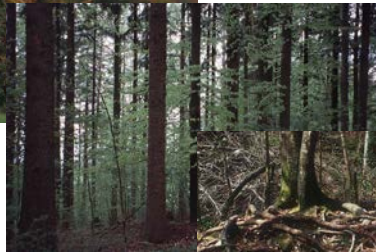
Trees

Roots

EXCELLENCE CANADA
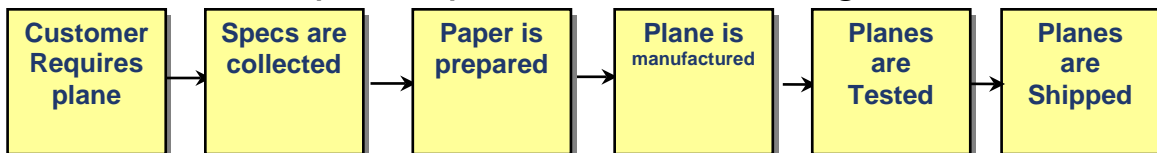
Level 1 Map – The What?

- A level one map shows the process at its highest level.

- Typically 5-7 steps,

- Useful to orient management to what you are doing.

Important facts about a Level 1 Map

Paper Airplane Manufacturing

Customer Requires plane	Specs are collected	Paper is prepared	Plane is manufactured	Planes are Tested	Planes are Shipped

Analyzing a level 1 map	
1. What is distinctive about this map?	
2. What language are we using?	
3. How many words?	
4. What symbols are we using?	
5. How many symbols are we using?	
6. What is the main question that this map answers?	

Process Mapping Symbols (Level 1, 2 & 3)

Symbol	Symbol Name	Symbol Description
	Activity	Show a Process or action step. This is the most common symbol in process mapping.
	Decision	Indicates a question or branch in the process flow. Typically, a Decision shape is used when there are 2 options (Yes/No, No/No-Go, etc.)
	On-Page Connector	This symbol is typically small and is used as a Connector to show a jump from one point in the process flow to another. Connectors are usually labelled with capital letters (A, B, AA) to show matching jump points. They are handy for avoiding flow lines that cross other shapes and flow lines. They are also handy for jumping to and from a sub-processes defined in a separate area.
	Off-Page Connector	Off-Page Connector shows continuation of a process onto another page. When using them in conjunction with Connectors, it's best to differentiate the labels, e.g. use numbers for Off-Page Connectors and capital letters for Connectors.
	Terminator	Terminators show the start and stop points in a process. When used as a Start symbol, terminators depict a *trigger action* that sets the process flow into motion.

The Most commonly used process mapping symbols

The vast majority of Process Maps rely on just 5 of the process symbols to do all the heavy lifting:

Activity   **Decision**   **Connectors**   **Terminator**

In fact, if you use other shapes, many people won't know what they are for, so you should probably add a shape symbol key to your map.
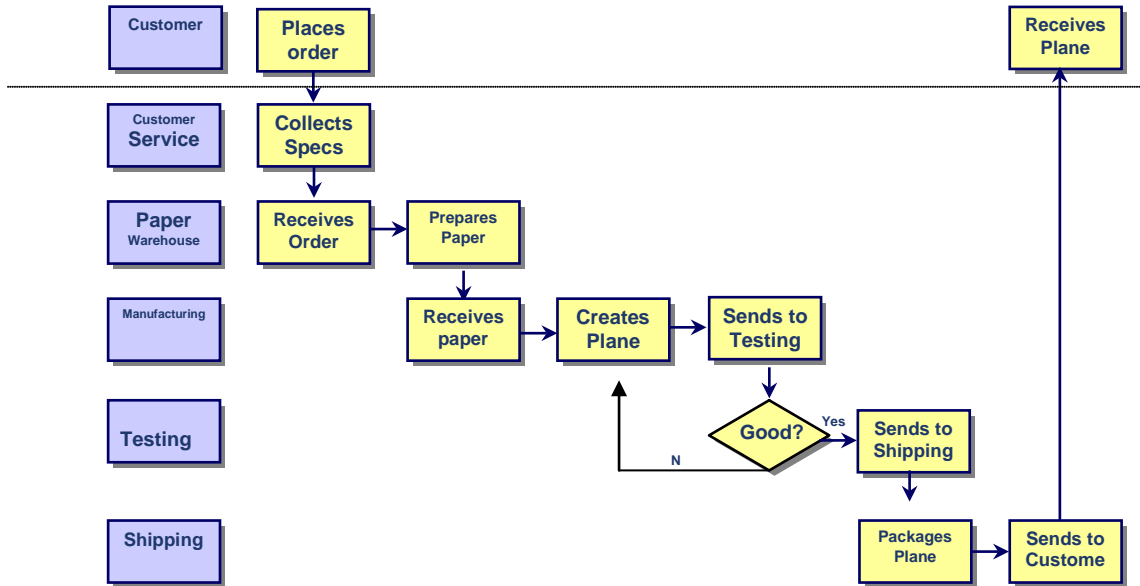
Level 2 Map – The Who Does What?

- A level two map shows the process in more detail

Paper Airplane Manufacturing Process

Analyzing a level 2 map	
1. What is distinctive about this map?	
2. What language are we using?	
3. How many words?	
4. What symbols are we using?	
5. How many symbols are we using?	
6. What is the main question that this map answers?	

How to construct a Level 2 Process Map

1. Select your process and define where it begins and ends

2. Identify the customer of the process and write it in a box at the top-left of the page.

3. Brainstorm a list of all the participants involved in the process (people or departments) and write them in a column below the customer.

4. Identify the first action (or step) that starts the process and draw it in a box next to the participant carrying out the function.

5. Identify the next activity that occurs and draw it in a box alongside the appropriate participant. Draw a line connecting these two boxes.

6. Continue adding activities until the process is complete.

Level 2 Process Mapping Tips

1. Focus on the primary customer

2. Interview people who are involved in the process, or invite key people to a session where the process will be documented.

3. Directly observe how the process functions first hand if required.

4. Describe activities in a common sense way using verb/noun combinations (e.g., Place Order).

5. Write the steps directly onto Sticky-Notes and paste them on the wall. They can then be moved around during the session until the correct arrangement is obtained.
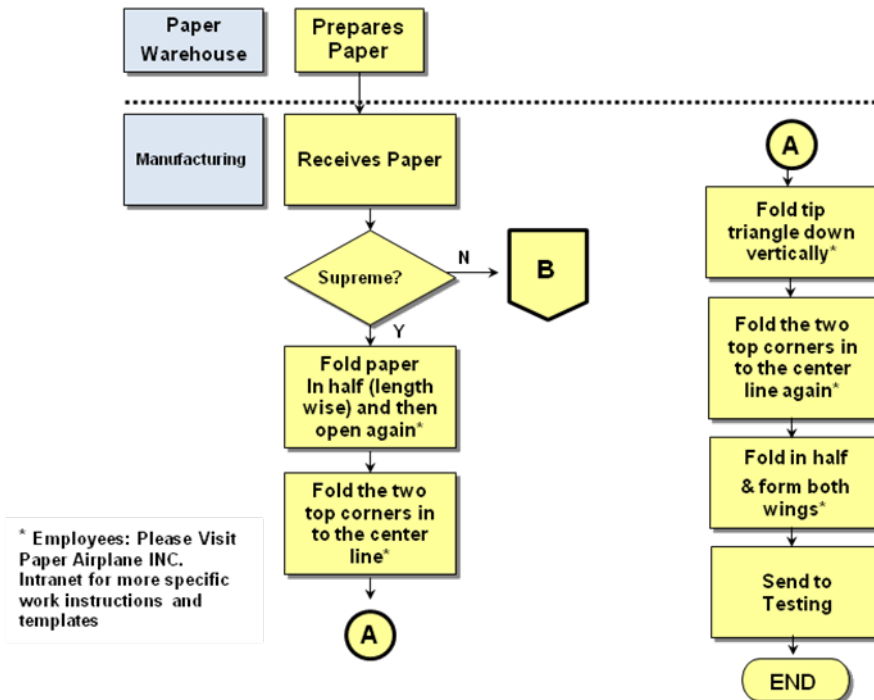
Level 3 Map – The How?

- A level three map shows the process at a transactional level
- Sometime referred to as a Flow Chart

Paper Airplane Analogy Process

Analyzing a level 3 map	
1. What is distinctive about this map?	
2. What language are we using?	
3. How many words?	
4. What symbols are we using?	
5. How many symbols are we using?	
6. What is the main question that this map answers?	

How to construct a Level 3 Process Map

1. Decide which step within a process you wish to map.

2. Define where that step begins and ends, in other words, what is the input that begins the step and what is the output that ends it.

3. Brainstorm all the tasks that occur within the step onto square sticky notes.

4. Arrange the sticky notes in chronological order by placing them on a large sheet of paper. Turning a square piece (activity) 45º turns it into a diamond (decision point).

5. Copy the diagram to paper using the appropriate symbols.

6. Put an END symbol at the appropriate points.

7. Review the map for accuracy.

8. Label the chart accordingly.

Level 3 Process Mapping Tips

1. Be sure to use the standard symbols consistently.

2. Make sure every decision diamond has two clearly labelled exits

3. Use concise and simple descriptions for each activity.

4. Clearly define the beginning and end of the chart.

5. Design the chart so that the flow moves from top to bottom and from left to right.

Process Mapping Exercise

EXERCISE

Suppose that the following represents the typical process associated with Expense Payment for an organization.

1. Mr. Bumblebee goes on a 2-day business trip to Vancouver. Some of his expenses were paid for on his personal credit card. When he gets back to the office he wants to get reimbursed and prepares a cheque request.
2. Mr. Bumblebee collects all his bills and attaches these support documents to the cheque request.
3. Mr. Bumblebee signs the request and then walks across the office and hand delivers it to his Director's in-box to get his request approved
4. The Director takes the request out of his inbox and reviews the request.
5. The Director determines if the information is correct
   ❑ If the information is correct the request is reviewed against approval criteria
   ❑ If the information is not correct the request is returned to the requester for corrections
6. If the amount is under $1000 the Director approves the request
7. If the amount is above $1000 the Director gets it approved by the Vice President of Operations
8. Once approved it is sent to Accounting
9. Accounting checks the in-bin twice daily
10. Accounting checks to see if the request is complete and that it has the proper approval
    ❑ If there is a problem they send it back to the Director for review
11. If everything is in order then they photocopy the request and place the original in a file and sends the second copy to the issuer
12. The issuer prepares the cheque
    ❑ Holds cheques until there is enough to process (10 minimum)
    ❑ Review the request
    ❑ Make photocopies for the file
    ❑ File the copy in the GRBG Basic Info Compartment (GRBG BIN)
    ❑ Enables Printer with appropriate pin code
    ❑ Signs on to the system & Enters cheque information
    ❑ Initials photocopy in file
    ❑ Waits 15 minutes for the Printer to warm up
    ❑ Prints cheques
    ❑ Sign off of the system
    ❑ Sends to signing authority
13. The signing authority checks if the info is correct, signs the cheque and sends it to accounting.
    ❑ If the info in not correct they send it back to the Director for review
14. Accounting Matches cheque with request, stuffs it in an envelope and routes to mail room
15. Mailroom gathers the cheques and delivers the cheque to Mr. Bumblebee
16. Mr. Bumblebee receives his cheque

<u>**In Small Groups:**</u>

- **Create a Level 1 map**
- **Create a Level 2 map**
- **Create one Level 3 map**

Process Mapping Symbols (Level 1, 2 & 3)

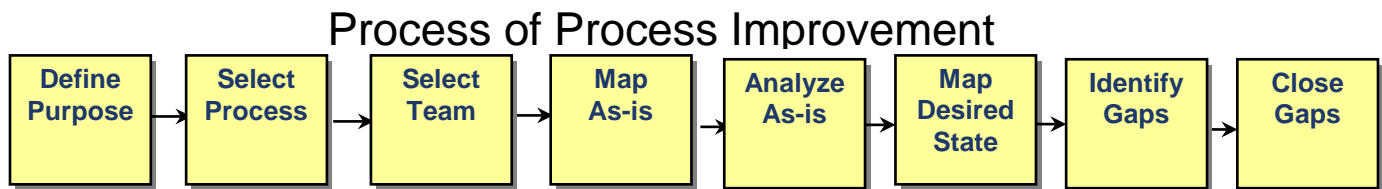| Symbol	Symbol Name	Symbol Description
	Activity	Show a Process or action step. This is the most common symbol in process mapping.
	Decision	Indicates a question or branch in the process flow. Typically, a Decision shape is used when there are 2 options (Yes/No, No/No-Go, etc.)
	On-Page Connector	This symbol is typically small and is used as a Connector to show a jump from one point in the process flow to another. Connectors are usually labelled with capital letters (A, B, AA) to show matching jump points. They are handy for avoiding flow lines that cross other shapes and flow lines. They are also handy for jumping to and from a sub-processes defined in a separate area.
	Off-Page Connector	Off-Page Connector shows continuation of a process onto another page. When using them in conjunction with Connectors, it's best to differentiate the labels, e.g. use numbers for Off-Page Connectors and capital letters for Connectors.
	Terminator	Terminators show the start and stop points in a process. When used as a Start symbol, terminators depict a *trigger action* that sets the process flow into motion.
	Inspection	In process maps, this symbol is full sized and shows an Inspection point in the process flow.
	Delay	The Delay symbol depicts any waiting period that is part of a process. Delay shapes are common in process mapping.
	Predefined Process (Subroutine)	A Predefined Process symbol is a marker for another process step or series of process flow steps that are formally defined elsewhere. This shape commonly depicts sub-processes (or subroutines in process maps).
	Document	Document any process flow step that produces a document.

PROCESS MAPPING FOR IMPROVEMENT

1. Define the Purpose/Objective for the Mapping Project

2. Select a Process

3. Select a Team

4. Map the 'Current State' Process (Level 1, 2, 3)

5. Analyze 'Current State' Process Maps, use level 3 to drill down as needed

6. Map 'Desired State' Process Maps (Level 1, 2, 3)

7. Identify gaps (the difference between where we are an where we want to be)

8. Close Gaps

Process of Process Improvement

Define Purpose	→	Select Process	→	Select Team	→	Map As-is	→	Analyze As-is	→	Map Desired State	→	Identify Gaps	→	Close Gaps

Summary - Benefits of Process Mapping

- Focuses on internal and external customers' requirements
- Management and employees take ownership through involvement
- Breaks down communication silos
- Supports process stability
- Defines process capability
- Tool for training
- Identifies decision complexity
- Provides a visual reference
- Identifies improvement opportunities

Common Pitfalls

3 Useful Articles

Process Mapping – The Forest, the Trees, and the Roots. (Part 1 of 3)
By: Dr. Adam Stoehr

When I mention Process Mapping to my friends and colleagues they immediately plan their conversation exit strategy. Literally, people start looking at the clock and scoping out the closest exits. I explain how a Process Map is a chart that shows how work flows through the functions in an organization. By the time I get to the part about how a map uses specific symbols to capture and record each step required to convert inputs into outputs, I usually see them scurry away like mice being chased by a cat.

As many of you know, it doesn't have to be that scary. Process Maps are very useful for improvement activities if they are used consistently and appropriately. At the most basic level, Process Maps are pictures of the way we work. Whether we work in the service/public sector or in manufacturing, Process Mapping is a requirement for continuous process/service improvement.

An approach to Process Mapping that is taught at various levels of detail in some of Excellence Canada's training programs is the best way to simplify your thinking on Process Mapping. The approach breaks down Process Mapping into three levels of detail. A Level 1 map shows the process at its highest level with a focus on the "what", a Level 2 map shows the process in more detail with a focus on the "who does what", and a Level 3 map focuses on the transactional level with a focus on the "how".

Part 1: The Forest – Level 1 Process Maps

So let's start with a Level 1 Process Map which I refer to as the forest. A Level 1 map shows the process at its highest level. It is typically five to seven steps and is useful to get an understanding of the big picture. To see an entire forest you have to climb to the highest point available and look down. Think about times when you've seen a whole forest. It was likely from a plane at 30,000 feet or from the top of a mountain. You will have to do the same thing when you create a Level 1 Process Map. If you don't get up high enough you will miss the forest because the trees are in the way.

Level 1 maps are used to tell the story of "what" is going on. They are very useful to give a high level understanding of your process to others. They show the basic steps required to convert an input into an output. When you are communicating a process to a large group of people who are not familiar (and won't need to be familiar) with the heavy detail, a Level 1 map is a perfect tool. The following example shows a basic process for a typical "Fabric-Based Domestic Engineering Cleansing Process" better known as laundry.

Fabric-Based Domestic Engineering Cleansing Process
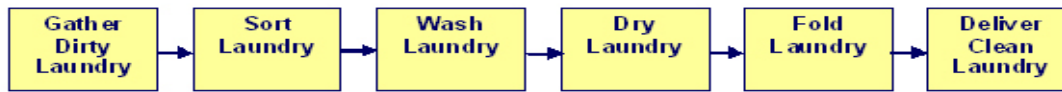
Notice the use of verb-noun combinations to describe the high-level value-added steps to convert the input (dirty clothes) into the output (clean clothes). We'll save the "who" detail for the Level 2 map and the "how" detail for the Level 3 map. Level 1 Process Maps are meant to be understood by anyone at the organization without the need for training of any kind. Someone should be able to look at the map and understand what is taking place. It gives people a good understanding of where a process starts and finishes as well as a clear indication of the inputs and outputs.

Level 1 maps can be deceptively difficult because people generally want to get right into the detail of "how" something is done before they consider "what" they are doing. This is a trap that many rookie process mappers fall into. The time spent understanding "what" is going on will be invaluable when it is finally time to think about "how" you are doing it.

It's your turn to try a Level 1 map. Choose a simple process that you are very familiar with. Use the boxes below to list the high level sequential steps required to convert the input to an output. Be careful not to delve into the "who" or "how" detail as we will save that for our Level 2 and 3 maps. You might want to try documenting the expense claim process, the hiring process, or the product/service development process for your organization.

Process Mapping – The Trees of Process Mapping. (Part 2 of 3)
By: Dr. Adam Stoehr

"If a tree falls in a forest and no one is around to hear it, does it make a sound?" A slight refresh on this famous saying could be: "If the people who work with a process don't see how their work is linked to others does the opportunity for improvement exist?" This article will explore Level 2 Process Maps and the importance of understanding the "Who Does What?" of Process Mapping.

It can be argued that without Process Mapping, process improvement is impossible. In the last issue of Quest for Excellence, we focused on the Level 1 process map. This map was a picture of the process at the highest possible level. It told the story of "what" was going on with your process. Level 2 maps shows the process in more detail with focus on the cross functional relationships between stakeholders and the work they do.

As you get deeper into this Process Mapping forest you need to understand the uses for a few Process Mapping symbols. Warning: beware of the overuse of infinite Process Mapping symbols. I don't want this to be like the latest Dan Brown novel where Robert

Langdon is searching for the Lost Symbol. Keep your Process Mapping symbols, simple. There are many symbols you could use but the ones I use most are the activity box and the decision box.
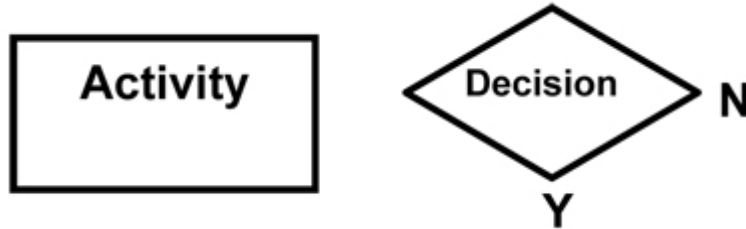

The activity box is a rectangle and as you might imagine it's the box where you write the activity (verb/noun combination). The decision box is a diamond and it has one entrance and two exits. There is always a question that needs to be answered in the box and the process will go in one of two directions depending on the answer to that question. (Yes/No, Go/No-Go, etc.)

Level 2 maps are used to tell the story of "who does what". They are very useful to show the layers of interconnections between stakeholders required to convert inputs to outputs. Understanding these connections is invaluable in breaking down communication silos. I view Level 2 process maps as silo busters because they help people understand how their work is connected with others. When you are communicating or improving a process with groups, a Level 2 map is a perfect tool.

The following example shows a basic process for a typical "Fabric-Based Domestic Engineering Cleansing Process" better known as laundry.

Fabric-Based Domestic Engineering Cleansing - Level 2 Process
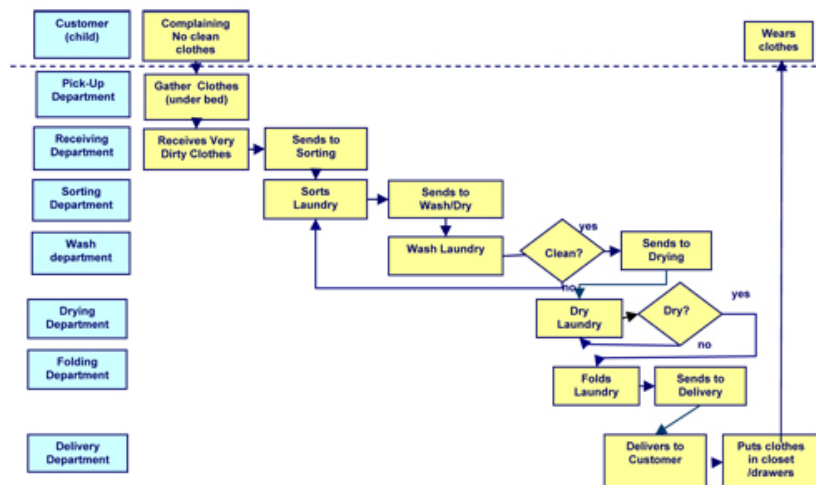
Notice that the blue boxes down the left hand side of the map represent all of the "who's" or departments and the yellow activity boxes represent the "what's". In this case the stakeholder boxes represent functions rather than individuals. All of the activities that are performed by a particular "who" are parallel to their blue box. For example if you look parallel to the Wash department you see that they are responsible for washing the laundry and then they decide if the clothes are clean. If the clothes are clean they forward them to the drying department, if the clothes are still dirty they send them back to sorting. In addition to understanding what a particular stakeholder is responsible for a Level 2 map clearly indicates the supplier/customer relationship. For example the folding department can see who their supplier is (Drying) and who their customer is (Delivery). This awareness will help break down communication silos.

It's tempting to want to dive down into greater detail for each activity. Resist this temptation and save the "how" detail for your Level 3 map. Do a quick "how" test. For each activity ask yourself, is this "what" I'm doing or "how" I'm doing it. If your activity sounds "how-ish" then save it for your Level 3 map.

It's your turn to try a Level 2 map. Choose a simple process that you are very familiar with. Use the boxes below to list the stakeholders (departments, functions, individuals, etc) then fill in the activities that each of those stakeholders undertake to convert the input to an output. Be careful not to delve into the "how" detail as we will save that for our Level 3 maps. You might want to try documenting the expense claim process, the hiring process, or the product/service development process for your organization.

Process Mapping – The Roots and Weeds of Process Mapping. (Part 3 of 3)
By: Dr. Adam Stoehr

A root is defined as the underground portion of a plant and serves as support and draws minerals and water from the surrounding soil. Getting stuck in the weeds is a concept often associated negatively with hindering progress. What do these two things have in common?

They are both ways of thinking about Level 3 Process Mapping. This article will explore Level 3 Process Maps and the importance of understanding the "How?" of Process Mapping.

In the last two issues of Quest for Excellence, we focused on Level 1 and Level 2 Process Maps. The Level 1 map was a picture of the process at the highest possible level. It told the story of "what?" was going on with your process. The Level 2 map showed the process in more detail with focus on the "who does what?" or the cross functional relationships between stakeholders and the work they do.

The symbols we introduced for Level 2 maps are also used for Level 3 maps. The two most common and useful symbols are the activity box and the decision box.
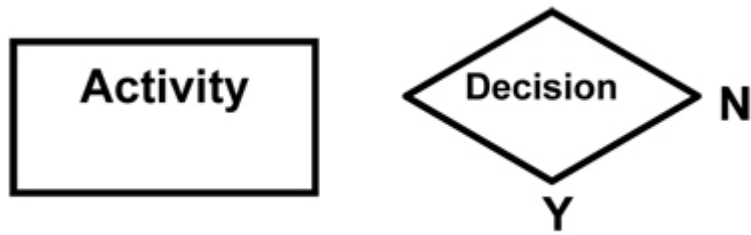
Level 3 maps show the process at a transactional level and show "how?" work is being done. They are very useful for team members who are working in the trenches. They give you the specific detail of how an input taken from your immediate supplier is converted to an output for your immediate customer. Level 3 maps are commonly used for training, on-boarding, and departmental improvement exercises. Level 3 maps are often called flow charts.

The following example shows a basic Level 3 Process Map for a typical "Fabric-Based Domestic Engineering Cleansing Process" better known as laundry.

Fabric-Based Domestic Engineering Cleansing - Level 3 Process
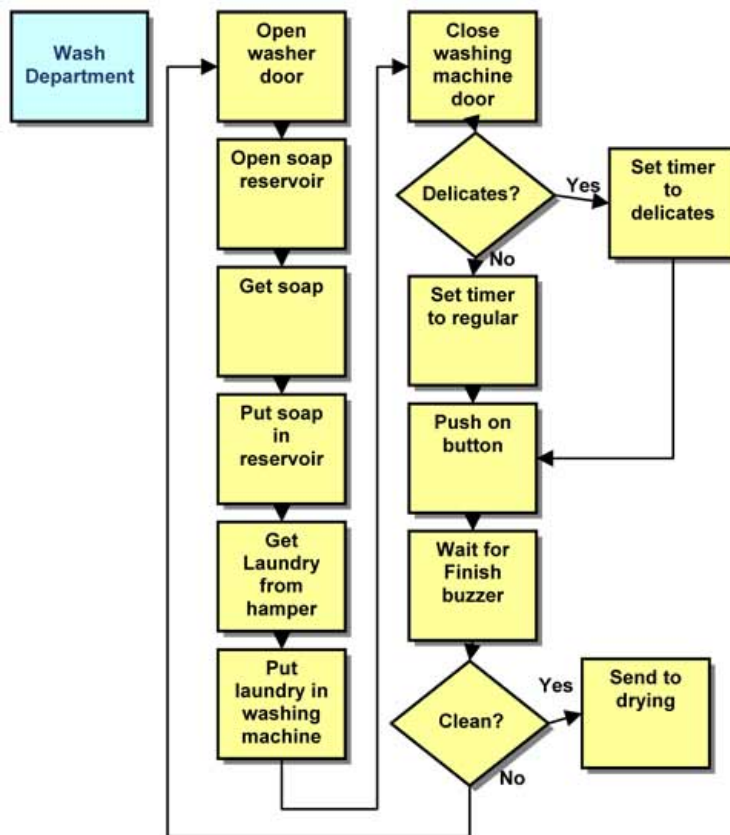
Notice that I've taken one stakeholder from my Level 2 map, in this case the Washing Department and I've delved into the very specific instructions on how they convert their input (dirty sorted clothes) to their output (clean wet clothes). There would be a Level 3 map for each "who" that was listed on my Level 2 map. The next Level 3 map for example would be for the Drying Department and would detail how they convert their input (clean wet clothes) to their output (clean dry unfolded clothes).

You can see how Level 3 maps can be looked at as roots. They are the underground portion of a process that serve as the lifeblood or support for the overall objective. Each Level 3 process must be done effectively and efficiently in order to satisfy the overall objective of doing laundry well. You might not see how they can be weeds. Level 3 maps have a tendency to be weeds because of a concept called sub-optimization. Sub-optimization is when you optimize processes at a sub-level. In other words it's when you attempt to make a process better at Level 3 without the context of Level 1 and 2. For example in Laundry you might try to fix something in the washing department that might make things more difficult in other departments. In an attempt to reduce re-washes, you might optimize washing by upgrading to industrial soap. This sub-optimization certainly improved the washing department but it might not have improved the entire system when you start getting complaints about itchy skin or harsh soap smells from your overall customer. Another reason why Level 3 maps are like weeds is because they tend to be the focal point of discussion when you sit down to document processes. Everyone in the organization wants to tell you "how" they do something rather than "what" they are doing. One can easily get stuck in the weeds of this discussion for hours. Basically what I'm saying is that the Level 3 maps are only as good as the Level 1 and 2 maps they are a part of. Without a contextual understanding of "what" is taking place "how" you do it is not all that interesting in terms of improvement.

This is as far as mapping goes. There is no Level 4 process map in this approach. Beneath a Level 3 map you may have things like procedures, work instructions, templates, etc. These tend to be more "wordy" and less "boxy" using word documents and PDF files. In some of the organizations that I work with I see this pyramid of documents on their Intranets for all employees to see. The key processes tend to be listed and the option for people to look at the Level 1 maps (Forest). If an employee is interested in seeing the "who does what" they can click on the Level 1 to see a Level 2 map (trees). If they want to know "how" something is done they click on one of the "who's" and up will pop a Level 3 process map (roots). If they want more details on a particular step in the Level 3 map you can click on it and up will pop a specific work instruction or a procedure or a job aid or template related to that step.

It's your turn to try a Level 3 map. Choose a simple process that you are very familiar with. Choose one of the "who's" from your Level 2 map and list it in the box below. Then fill in the activities of "how" they convert their specific input to a specific output for the next stakeholder. Go as deep into detail as you feel necessary to describe how things are done.

NOTES