A Brief Intro to the Process Flow Mapping of Operations

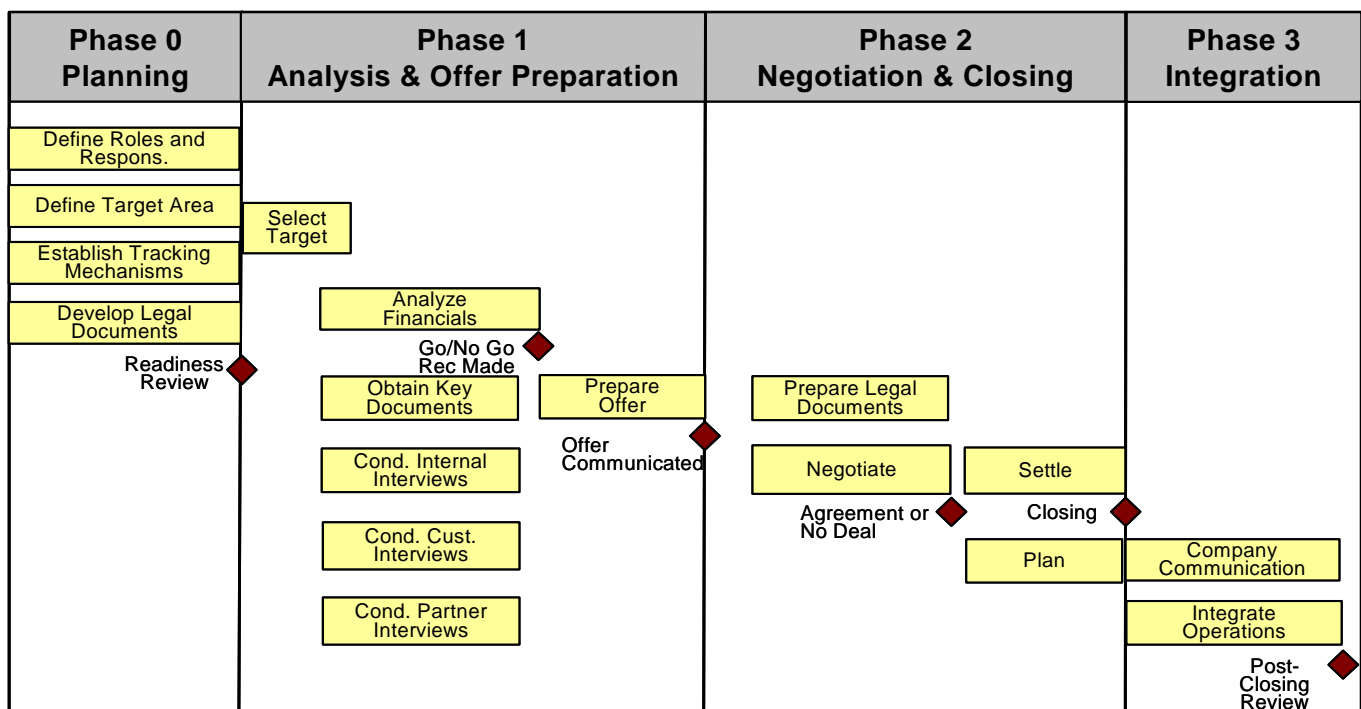**Process Flow Mapping Describes How Work Gets Done**

Process flow mapping, the diagramming and documentation of how work gets done in a company (or between companies), is something that I have wanted to write about for sometime as it is closely tied to my history with telecommunications operations, management consulting, project management, and work in the software industry with companies in the enterprise application integration (EAI) and business process management (BPM) space. Flow mapping techniques can help to serve popular management goals such as:

- optimizing process throughput (e.g., across departmental boundaries)
- locating and eliminating process flaws
- increasing value touch points with customers
- redesigning processes (e.g., for cost reduction) or introducing new processes (e.g., for new revenue streams)

What is interesting about the process flow subject is that there are many different ways to approach a problem at hand. Different methods will tend to accentuate different benefits. This document provides a brief intro to some general forms of process flow mapping

**Each Type of Flow Map Provides Distinct Value**

An example, **activity overview chart** is depicted below:

| Phase 0 Planning	Phase 1 Analysis & Offer Preparation	Phase 2 Negotiation & Closing	Phase 3 Integration
Define Roles and Respons.			
Define Target Area	Select Target		
Establish Tracking Mechanisms			
Develop Legal Documents	Analyze Financials		
Readiness Review ◆	Go/No Go Rec Made ◆		
	Obtain Key Documents	Prepare Offer	Prepare Legal Documents
		Offer Communicated ◆	
	Cond. Internal Interviews	Negotiate	Settle
		Agreement or No Deal ◆	Closing ◆
	Cond. Cust. Interviews	Plan	Company Communication
	Cond. Partner Interviews		Integrate Operations
			Post-Closing Review ◆

> **Q: Which phase involves which activities?**

The activity overview chart flows from left to right and depicts groups of processes that occur over time. Some benefits of using an activity overview chart include being able to identify coarse relationships between processes and being able to depict which processes can run in parallel (e.g., to reduce cycle-times). Major milestones can also be identified using an activity overview chart.

The next chart is a lower-level ==**process flow chart**==:
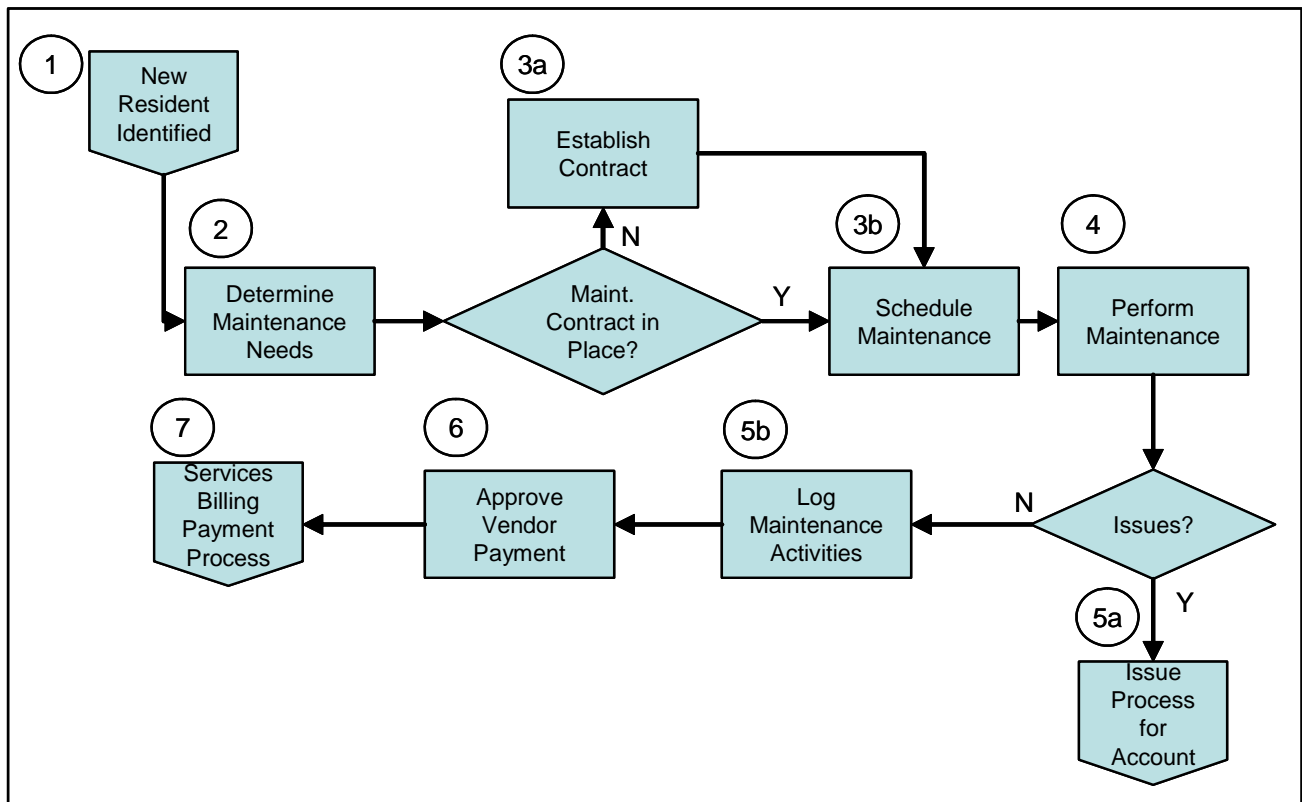
The benefits of this type of chart include being able to analyze a process at lower-level and being able to specify how things are actually going to work. A process dictionary can be used in conjunction with the chart to describe inputs and outputs, subprocess owners, and subprocess details. When optimizing a process, such as attempting to reduce quality defects, it is often useful to analyze a process at low levels such as this. As another example, when scaling up operations in some industries and functional areas, it is often helpful to have processes specified at low levels to train new people on specific methods of working.

Combinations of the charts above can be formatted into a "swim lane" chart:
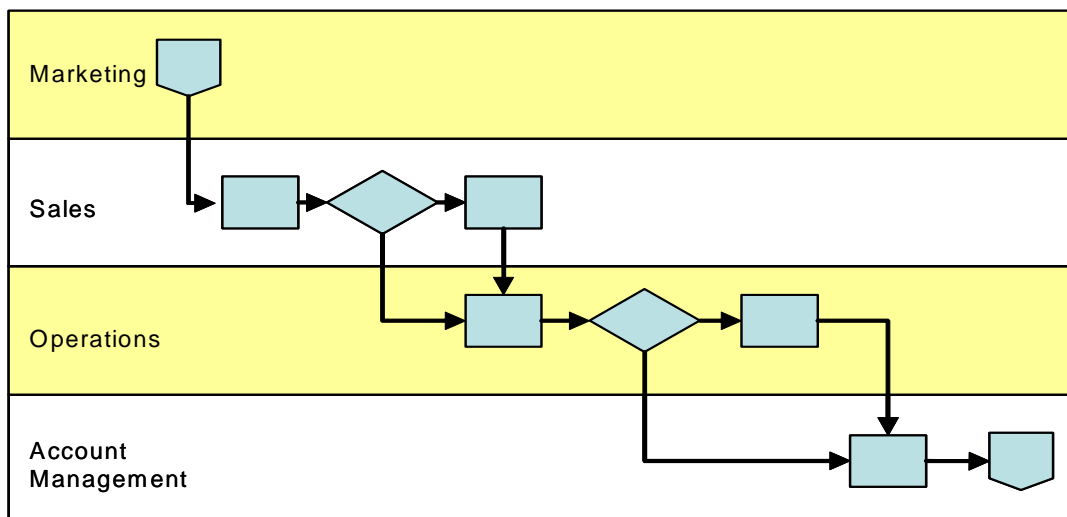
Swimlane Diagram: Who Does What When?

In the swim lane chart, graphical process elements are organized according to the department responsible for the specific part of the process. The chart then reads from left to right. One good use of swim lane charts is in reengineering and trying to analyze processes as to whether large efficiencies can be gained by eliminating process handoffs, consolidating roles, making greater use of technology, and in general, rethinking the value delivered across the entire flow.

Yet another type of chart is a milestone chart:
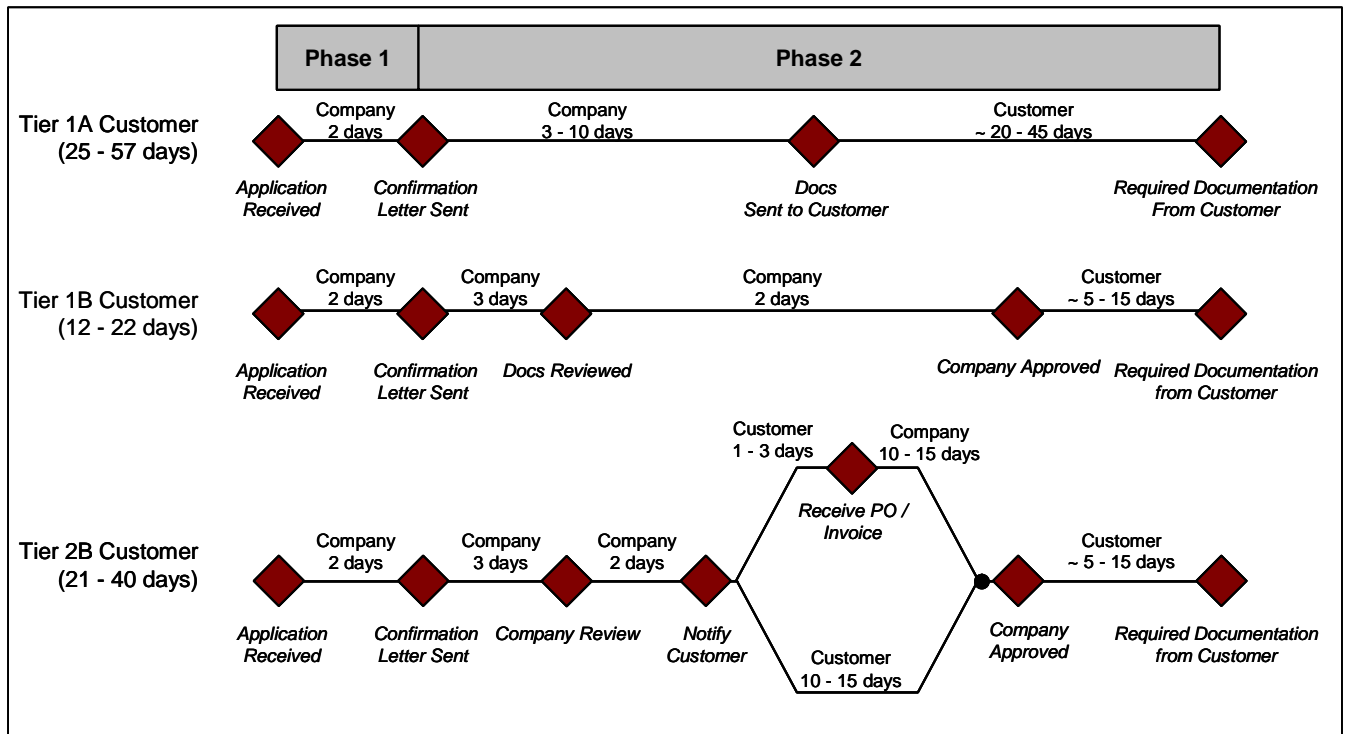
The milestone chart reads from left to right and depicts keys points in time that have been reached for a business process. The milestone chart is useful in cases where the endpoints of a process are important to focus on. This type of chart can be used in conjunction with the other charts or separately. In many cases, best-of-breed companies will establish dashboard indicators and metrics for the business around milestone constructs such as pipeline, cycle-time, and aging reports.

What Are Some Practical Examples of Using Process Flow Mapping Concepts?
Some examples of using process flow mapping concepts are described below:

- *Change management* – in change management, there are usually "as-is" activities, processes, and organizational structures in place. Process flow mapping can be used to define both "new" and "target" processes of a company. Program management can be used in conjunction with mapping to get new processes rolling and to audit and control how well new processes are taking in the organization.

- *Incubation of new processes* – in many new business launches or new process introductions, activity and process flow mapping can be used to figure out how to actually implement and execute the operations of the business. Various degrees of diagramming and analytics can help an organization get up operations, sales, and manufacturing learning curves.

- *Optimization* – as information technology or other mechanisms are put in place to gather data on how well organizations are performing business processes (e.g., in terms of defects, cycle times to service level agreements), such facts can be used to determine whether to hold steady or try to tackle improvements.

Process Mapping is Not the End Game … Reaching the End Game Requires Goal Setting, Control, and Resolve

Process mapping can be an extensive effort to undertake involving hundreds to thousands of staff hours. That said, the payoffs can be big, and there are ways to cut down on the process provided that management knows what is being traded off. Beyond the mechanics of process mapping, the most important thing to remember is the end goal. Process mapping by itself is just a tool, and there are usually other business factors and management processes that need to be put in place to capitalize on the effort. If I had to rattle off three things that I felt should always be addressed in the context of process mapping, they would be identifying what is the end goal, what is the mechanism for program management, and what role leadership will play in getting what needs to get done.

About the Author

Steve Shu serves as the Managing Director for the S4 Management Group and focuses on the operations implementation practice of the firm. Prior to founding the S4 Management Group, Mr. Shu was Vice President of Operations and Business Development for FiveSight and played a lead role in obtaining FiveSight's first enterprise clients, first international clients in Japan, and first round of corporate venture capital. Mr. Shu joined FiveSight from Pittiglio Rabin Todd and McGrath (PRTM), the premier management consultancy to high-tech firms, where he specialized in interim management and the growth and operations of start-ups, carve-outs, and new lines of business. PRTM was recently ranked the #1 firm in Consulting Magazine in the areas of leadership and consistent placement of managers. Additionally, Mr. Shu has held consulting, management, and systems, software, and design engineering positions with Bellcore (now Telcordia Technologies), FSLI, and AT&T Bell Laboratories (now Lucent Technologies). Mr. Shu holds an MBA from the University of Chicago and both an ME and BS in Electrical Engineering from Cornell University.

About the S4 Management Group

The S4 Management Group is a boutique consulting practice providing general management consulting services in the areas of operations and marketing. S4 Management Group consultants provide services to both executive and line managers ranging from diagnostics to program implementation and performance measurement.

For more information on the S4 Management Group, prospective clients and partners may visit www.s4management.com or send email to info@s4management.com.
.