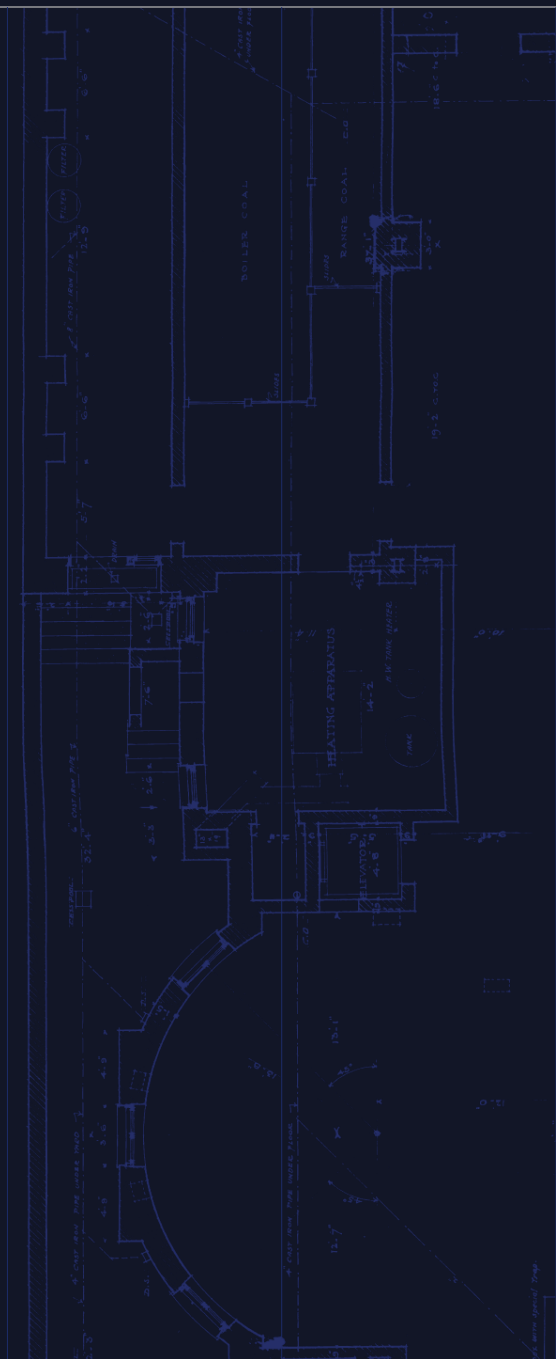
PROCESS MAPPING OVERVIEW



PROCESS MAPPING DEFINED

A technique used to visually represent the steps in a business process or workflow, showing how it is accomplished start to finish.

1

VISUAL REPRESENTATION

Uses specific symbols and diagrams to depict tasks, decisions, inputs/outputs, and roles

2

PROCESS UNDERSTANDING

Helps identify who does what, when, where, and how

3

IMPROVEMENT CAPABILITIES

Identifies bottlenecks, inefficiencies, and areas for automation

WHAT TO INCLUDE

CLEAR OBJECTIVE

WHAT IS IT INTENDED TO ACHIEVE?

DEFINED SCOPE

WHERE DOES THE PROCESS BEGIN AND END?

STEP-BY-STEP ACTIVITIES

BREAK DOWN TASKS IN LOGICAL, SEQUENTIAL STEPS - WHO DOES WHAT, WHEN, AND HOW – WITH CLEAR HANDOFFS, RESPONSIBILITIES, AND LANGUAGE

ROLES AND RESPONSIBILITIES

SPECIFY OWNERS AND PARTICIPANTS

WHAT TO INCLUDE

INPUTS AND OUTPUTS

WHAT RESOURCES OR INFORMATION ARE NEEDED TO START

TOOLS AND SYSTEMS

WHEN APPLICABLE, LIST SOFTWARE, PLATFORMS, FORMS, OR TEMPLATES INVOLVED IN THE EXECUTION

SUCCESS CRITERIA/KPIS

INCLUDE MEASURABLE OUTCOMES TO ASSESS EFFECTIVNESS

TIE METRICS TO TIME, QUALITY, COST, COMPLIANCE, ETC.

REVIEW AND FEEDBACK LOOPS

BUILD ON CONTINUOUS IMPROVEMENT MECHANISMS

DOCUMENTATION

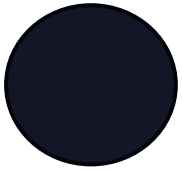
ENSURE THE PROCESS IS EASILY ACCESSIBLE AND READABLE

PROCESS & OPERATION SYMBOLS

PROCESS
The most frequently used flowchart shape shows a singular action, task or operation that needs to be done

ARROW/FLOW LINE
Process flow direction, identifies movement in a process

START / STOP
Used to demonstrate the entry and exit of a process. A process typically only has one entry point/trigger to begin. A process can have multiple exit points. The identification of these points is crucial for repeatability and evaluation of process efficiency/success

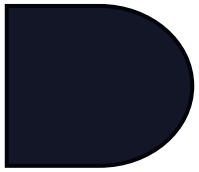


CONNECTOR
Used to connect different parts of the process. These parts are typically on opposite sides of the map. This helps avoid confusing flow lines

PROCESS & OPERATION SYMBOLS

DECISION
A decision needs to be made. The arrows flowing from the decision shape are usually labeled with yes, no, true or false. A decision symbol should **only** be used if the consequences of the decision **differ in result**.

SUBROUTINE
Shows a series of actions related to a task, which itself is part of a larger process. Indicates the existence of a separate predefined process. This symbol should be used if a step within a process map has three or more distinct steps. Any subroutine identified must also be mapped



DELAY
Represents a waiting period or delay in the process.

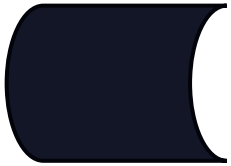
INPUT, OUTPUT & INFORMATION SYMBOLS

INPUT/OUTPUT OF DATA
Material or information entering or leaving the process. Receiving a report is an input. Generating a report is an output.

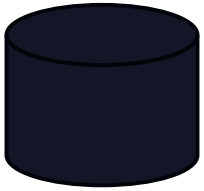
DOCUMENT
Indicates a process step that generates a document or report.

SORT
Indicates the sorting of data, information, and materials into a predetermined order

MULTIPLE DOCUMENTS
A process step that produces multiple documents or reports



STORED DATA
Represents a step in the process where data gets stored



DATABASE
Indicates the use of either an internal or external database/system to assist with the process.

WHAT IS INSUFFICIENT

- JUST A LIST OF TASKS – NO ROLES, DEPENDENCIES, TIMING, ETC.
- NO OWNERSHIP OF PROCESS OR TASKS
- LACK OF METRICS
- OVERLY GENERIC LANGUAGE
- OVERLY RIGID
- NO CLEAR DIRECTION OF TASKS

TAXONOMY

- ✓ EXPLAINS THE RELATION OF PROCESS IN RESPECT TO THEIR HIERACHAL STANDING WITHIN THE ORGANIZATION
- ✓ HELPS ENSURE THE RIGHT LEVEL OF DETAIL
- ✓ SUPPORTS CONSISTENCY ACROSS TEAMS
- ✓ ENABLES REUSE AND AVOIDS REDUNDANCY
- ✓ IMPROVES GOVERNANCE AND MAINTENANCE
- ✓ HELPS ENSURE **CONSISTENCY, CLARITY, AND SCALABILITY** ACROSS ALL PROCESS DOCUMENTATION

Knowing the taxonomy of a process can help with identifying what type of map to create.

TAXONOMY
EXPLANATION & EXAMPLE

LEVEL	DESCRIPTION	EXAMPLE
Level 1	**Enterprise-Level View**	“End-to-end” value chain (e.g., Order-to-Cash)
Level 2	**Core Business Process**	“Procure Goods,” “Onboard Employee”
Level 3	**Sub-Process**	“Create Purchase Requisition,” “Set Up Workstation”
Level 4	**Activity / Task**	“Log into system,” “Fill out form”
Level 5	**Work Instruction / SOP**	Detailed steps/screenshots (e.g., click-by-click guide)

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BUILDING A PROCESS TAXONOMY - LEVEL 0 TO 2

Start by mapping out the core Level 0 processes. Continue to break down sub-processes to identify level 2+ processes to ultimately map.

Level 0 (Enterprise View)	Level 1 (Process Area)	Level 2 (Sub-Process)
Operations	Reservation & Scheduling	Online booking system management, phone/email reservations, waitlist management, seasonal capacity planning
Operations	Dog Intake & Admission	Check vaccination records, health screening, temperament assessment, owner instructions collection
Operations	Boarding Care & Daily Routine	Feeding schedules, exercise & playtime, medication administration, grooming & hygiene, behavior monitoring
Operations	Special Care & Services	Handling senior dogs, administering special diets, medical needs, enrichment activities
Operations	Check-Out & Departure	Owner communication & stay summary, belongings return, billing settlement, feedback request
Customer Management	Customer Acquisition	Digital marketing, referral program, partnerships with vets/pet stores, promotions
Customer Management	Client Communication	Pre-stay instructions, real-time updates (texts/photos), post-stay follow-up
Customer Management	Customer Service & Issue Resolution	Responding to inquiries, handling complaints, incident reporting
Customer Management	Loyalty & Retention	Membership programs, rewards/discounts, repeat booking incentives, NPS/feedback tracking
Administration	Staff Management	Recruitment, onboarding, shift scheduling, ongoing training, performance reviews
Administration	Facility Management	Cleaning protocols, kennel maintenance, safety inspections, equipment upkeep
Administration	Supplies & Vendor Management	Food procurement, bedding & cleaning supply orders, vendor negotiations, inventory tracking
Administration	Compliance & Risk Management	Licensing, insurance, health/safety compliance, incident documentation
Finance	Billing & Payments	Invoice generation, POS transactions, refunds & adjustments, deposits/prepayments
Finance	Financial Controls	Cash handling procedures, reconciliations, fraud prevention, expense tracking
Finance	Reporting & Analysis	Revenue reporting, cost analysis, profitability metrics, occupancy/utilization reports
Finance	Budgeting & Planning	Annual budgeting, forecasting demand, cost optimization, investment planning

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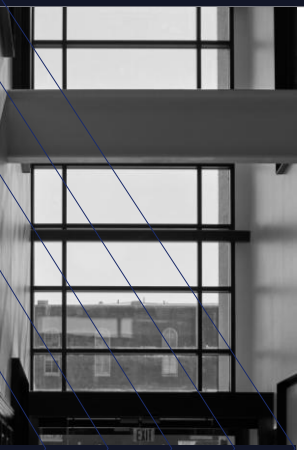


RECOMMENDED TOOLS

There are a variety of process mapping tools and software. Lucidchart is the most popular, but we've included a list of alternatives.

LUCIDCHART

Access Preferred Tool; A powerful visual workspace for creating flowcharts and process maps with collaborative, real-time editing.

CANVA

A user-friendly design tool that lets you create simple, visually appealing process diagrams using customizable templates.

MICROSOFT VISIO

A professional diagramming software for detailed, data-linked process maps and organizational charts.

MIRO

An online collaborative whiteboard for brainstorming and mapping processes visually with team participation in real time.

PEN AND PAPER / WHITEBOARD AND MARKER

Physically creating them with pen and paper is always an option! This should be utilized when first drafting, although it makes editing later more difficult.

TYPES OF PROCESS MAPS

These can often overlap. Any of these map types can be in a Swimlane.

TYPE OF MAP	DESCRIPTION
HIGH-LEVEL PROCESS MAP	▪ High-level representation of a process ▪ Often includes many subprocesses that may be represented by Detailed Process Maps ▪ Typically, level 1 or 2.
DETAILED PROCESS MAP	▪ Provides a much more detailed look at each step in the process ▪ Typically, level 3 or 4.
WORK-FLOW DIAGRAM	▪ A work process shown in “flow” format ▪ Typically, level 4 or 5
RENDERED PROCESS MAP	▪ Represents current state and/or future state processes to show areas for process improvement ▪ Typically established after other maps have been created and evaluated ▪ Can be any level but should keep the goals of level 1 and 2 at mind.
SWIMLANE (OR CROSS-FUNCTIONAL) MAP	▪ Separates out the sub-process responsibilities in the process between team members or departments ▪ Can be any level
VALUE-ADDED CHAIN DIAGRAM	▪ Unconnected boxes that represent a very simplified version of a process for quick understanding ▪ This is like a list of steps but still utilizing the correct symbols ▪ Typically, level 1 or 2.
VALUE STREAM MAP	▪ Making a product or providing a service ▪ Typically, level 3, 4 or 5

HOW TO START

RINSE AND REPEAT THE BELOW STEPS!

BUILD PROCESS TAXONOMY

- Leadership should align on the larger goals and processes designated as Level 1 and 2
- By identifying these processes first, it will assist with the eventual designation and mapping of processes that exist among level 3, 4, and 5

PRIORITIZE PROCESSES

- Once the processes have been identified, leadership should prioritize the order of importance for the completion of mapping
- Helpful Considerations: Most important; most complex; management's view of where there is an optimization opportunity; high ROI from automation

BEGIN MAPPING PROCESSES IN ORDER OF PRIORITY

- Use these slides as guide for proper map type and symbol use
- Utilize to color guide here for unity on process maps throughout the entire organization

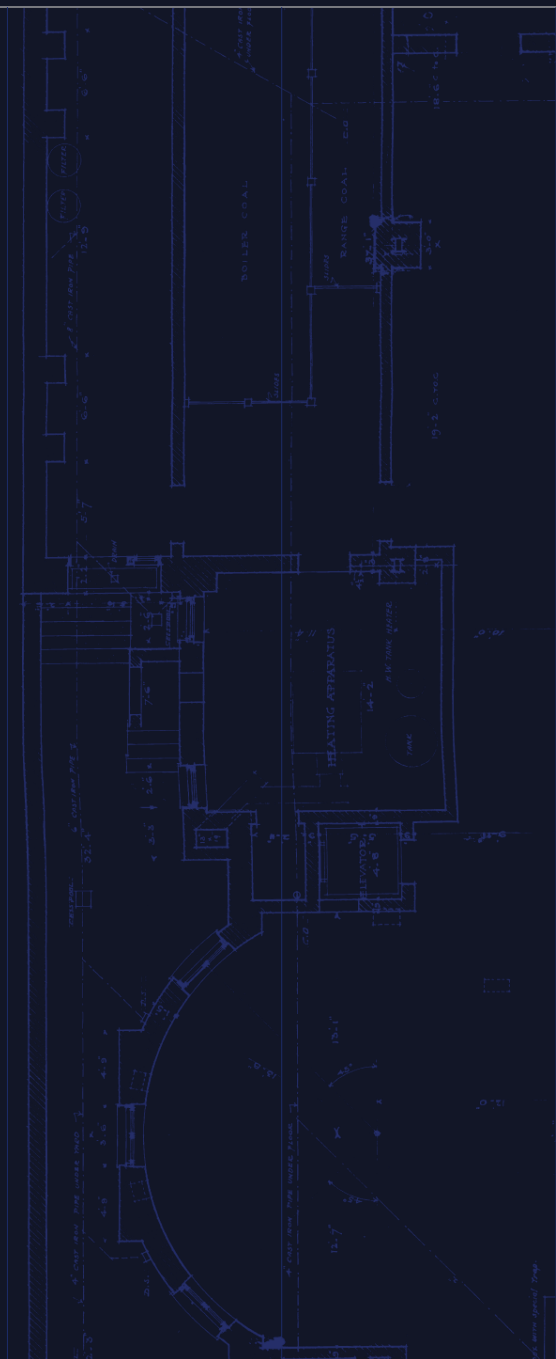
REVIEW MAPS

- Identify area suitable for optimization and automation
- Considerations: Commonly repeatable tasks; rendered process maps; processes that involve little or no input

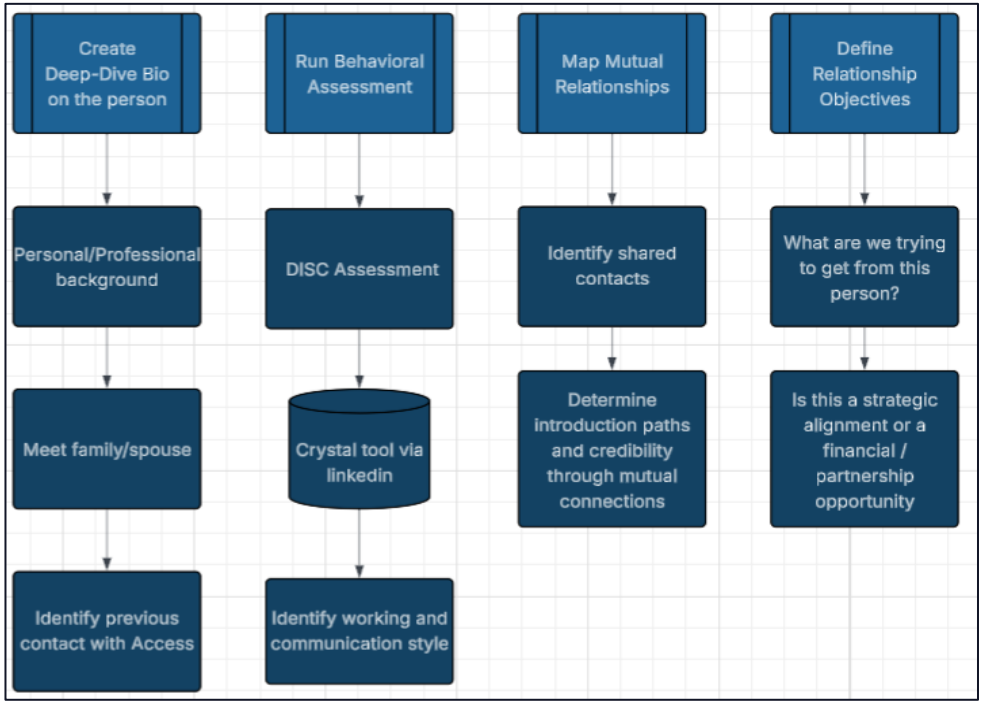
POC AUTOMATION

- Once you have 10-15 processes mapped, review and pick 1-2 for POC automation

EXAMPLE PROCESS MAPS



HIGH-LEVEL PROCESS MAP

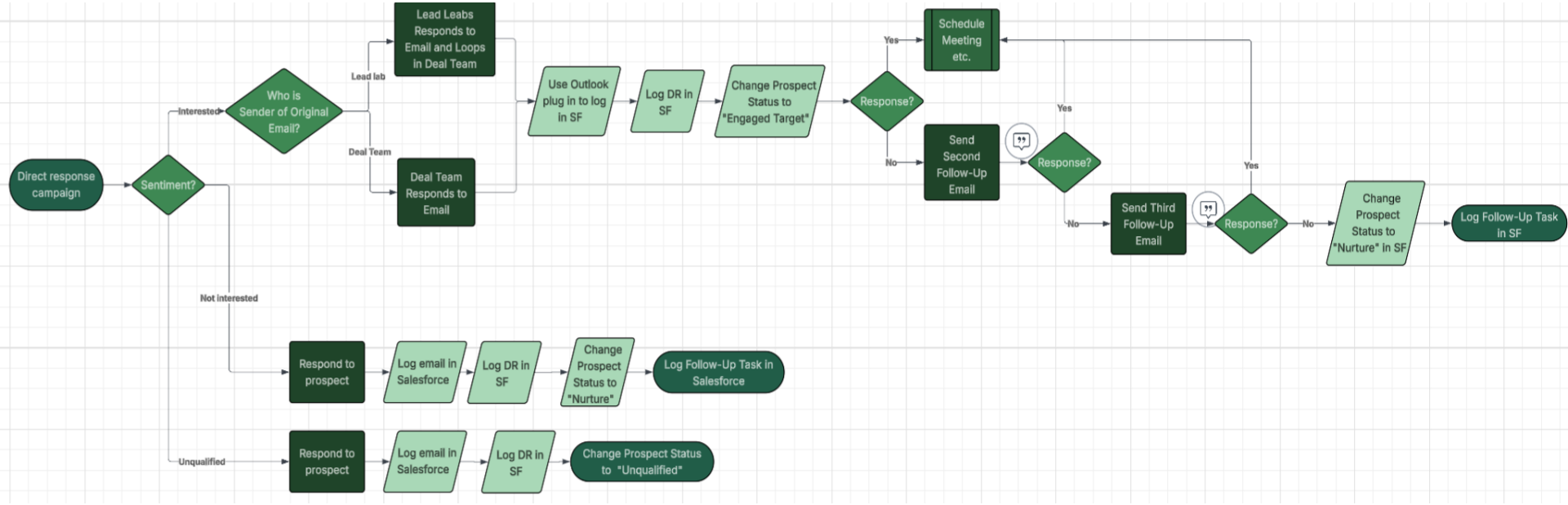


The first image is a segment high-level map.

The second image is an example of some the associated mapped sub-processes. These can and often should be even further defined.

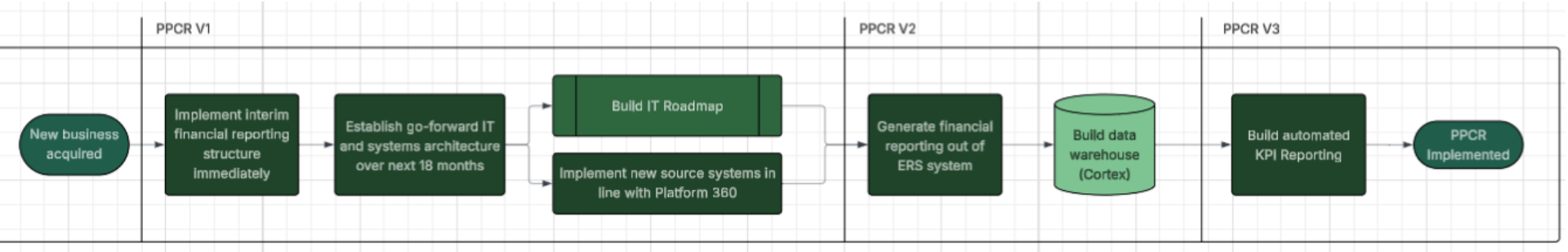
DETAILED PROCESS MAP

This is a detailed level 4 process map. Note the “Schedule Meeting” subprocess which could be mapped as a level 5 workflow. In this map it is a sub-process due to its larger picture level 4 identification.



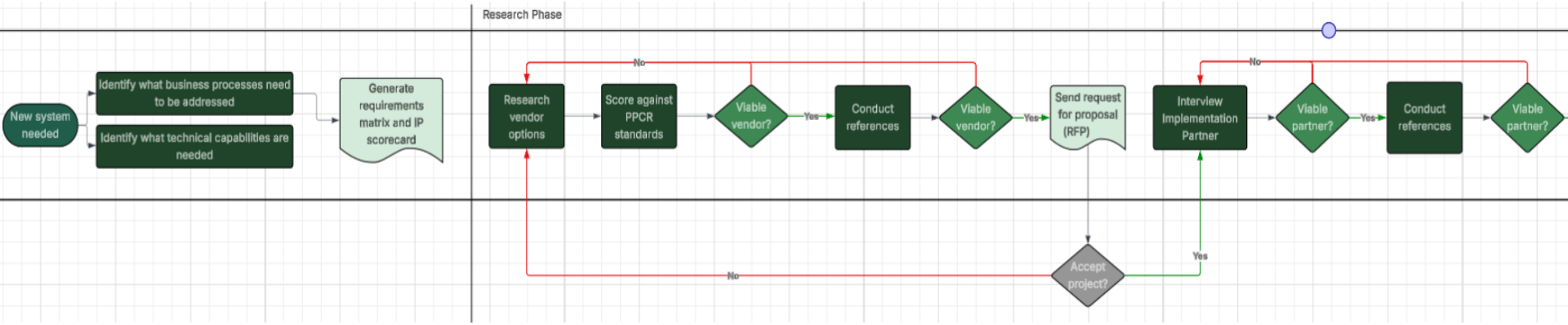
WORK-FLOW DIAGRAM

While workflows are typically level 4 or 5. This is a great example of a level 2 workflow. Note the simplicity and single flow direction.



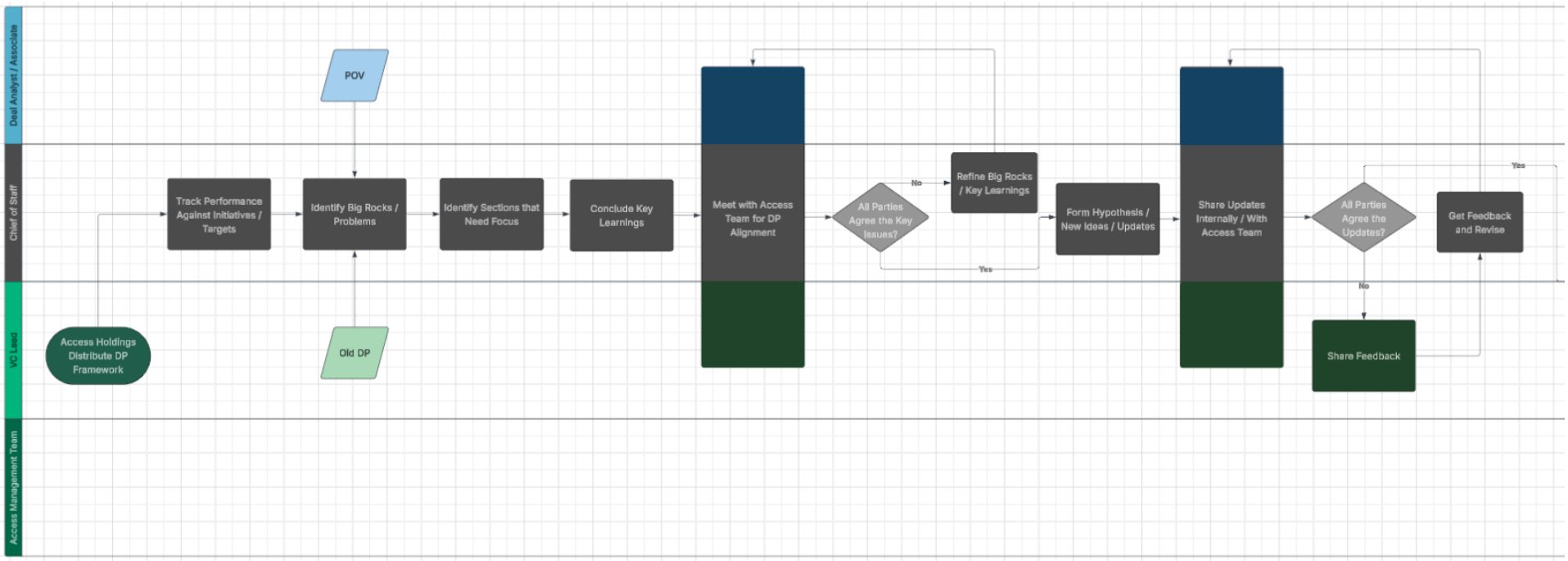
RENDERED PROCESS MAP

This is a segmented portion of a process map. Note the repeated decision points. When creating a map such as this, it provides an opportunity to later evaluate for improvements with a Level 1 or 2 focus



SWIMLANE (OR CROSS-FUNCTIONAL) MAP

Here is a segmented Swimlane that shows the interactions of a process cross-functionally. It shows tasks that are held by individual departments as well as shared tasks



VALUE STREAM MAP

This is a Value Stream map that uses a Swimlane. As stated before, any map can be a Swimlane. The designation of value-stream comes in relation to it's deliverable and taxonomy status. In this case, the deliverable is an approved budget. Also note the timeline at the top. Any map can have a timeline and any process that has a defined timeline should include one in its process map.