

Plan	Init	Pl	Ex	MC	Cl
Init	2	1	1	2	1
Pln		4		1	
Exe		6	1		
Mon		1	1		
Clse		1	1	1	
Total	2	9	3	4	2

Mapping Business Processes for Productivity - II

Process Mapping for Productivity - 201

Review Session One highlights

Mapping: *Value, Differentiate*

Practical Benefits (goals, objectives)

Best Practices by Phase:

Shaping the Effort

Context, Framing, [iteration]

Facilitation and Flow

Maximizing Success and Closing

Session 1: the Highlights

Recap from Process capture session (101)

Process '101' Topics (Original Webinar Agenda)

Process Mapping Overview, Definitions
Value Proposition

Potential Benefits of Process Mapping

Why and When to capture Process?

Notation Symbols and Event Flow

Process Capture roles and approach

Standards, Styles, Examples

Useful Resources and Contacts

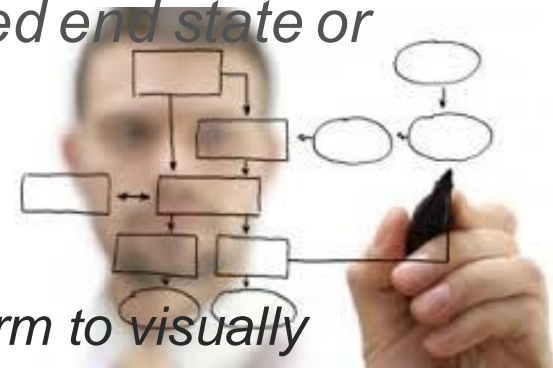
Wrap-up and Feedback

“Process Model” [from UC EA Glossary]

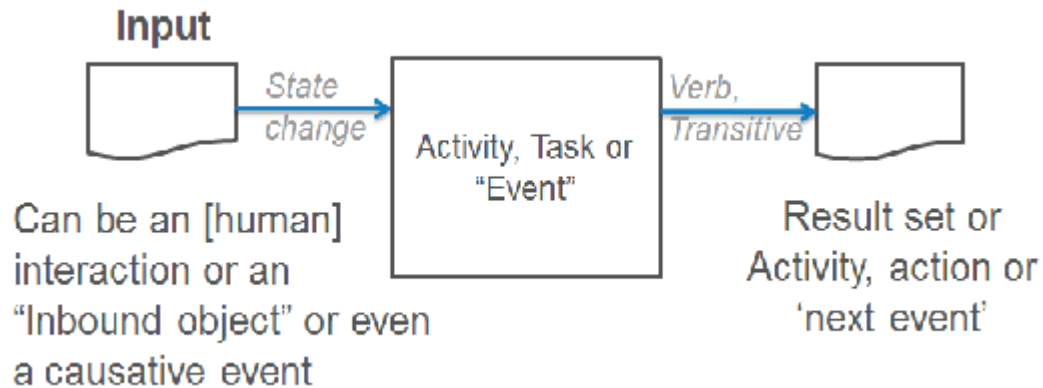
A representative depiction of a sequence of events [or “tasks”] which cause action and the associated sequence of events and rules involved in decision making and information flow along the event “steps” that progress to achieve the desired end state or outcome.

“Process Modelling”

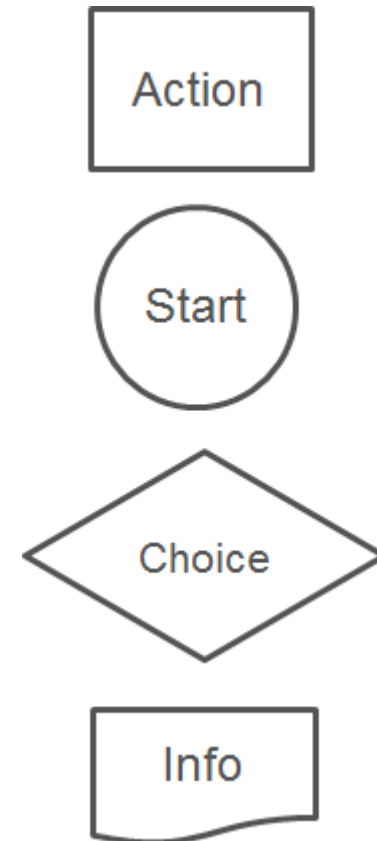
“A set of practices or tasks that companies can perform to visually depict or describe all the aspects of a business process, including its flow, control and decision points, triggers and conditions for activity execution, the context in which an activity runs, and associated resources.”



Process Capture and Flow, Icons *recap*



And the primary symbols, again are...



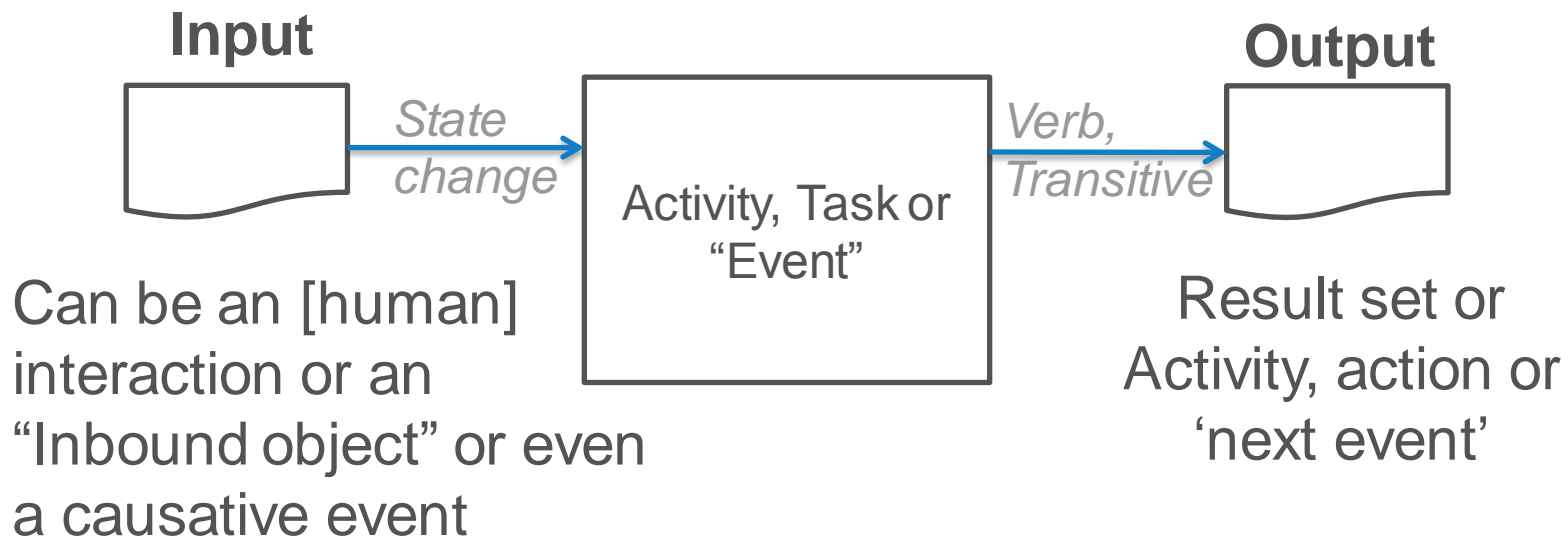
The practice of capturing the various components of what an organization, department, or business unit's functions perform under routine operation which has impact on the organization in some measurable way.

Yet actually, Process Mapping is...

The linkage between these often disparate yet related models is the essence of Process Mapping. An understanding of the Organizational Structure is essential to the arrangement of these activities in a way that catalogues and depicts the organization's operational capacities.

Event flow and chaining *review, How-to*

The flow is shown below to depict the progress of the Process; we chain in sequence (L → R).



Mind the accuracy of the tense and the maintenance of "levels" at the outset

Making the Leap

Process Modelling is more about understanding workflow and interactions... Mapping is about outlining the core business functions: capturing Processes, charting relationships, grouping like Process families.

Key differentiators in a “Mapping Effort”

*Mapping is the practice of capturing the various components of what the organization, department, or business unit functions do routinely; all of which have impact on the organization in some measurable way. Understanding the linkage between distinct, yet related work types is the essence of **Process Mapping**.*

Process Mapping: Practical Benefits *review*

Understanding key process inputs and position in larger context w/i organization, establishes value of role/function

Defining relations between Processes leads to a common understanding of organizational workflow, dependencies, throughput, (handoffs / bottlenecks) and team synergies.

Imparts knowledge of organizational design and functions. Increases knowledge of interdependency of roles and functions; allows a broad insight to improve team effectiveness; can even impact overall Org productivity.

Systemic Value of Process Mapping *new*

Enable team leads, analysts and organization leaders to set performance standards/targets, gauge realistic setting and attainment of objectives; aligned to business' goals

Performance Status and Enhancement / Innovation to affect organizational mission, positioning

Charting of the Organization Functional effectiveness: measuring mode, capacity and fit of current form to expected output/results.

Process Hierarchy

A short Primer on “Levels”

Level 0

Sets the context of a **Process Group** to the Org Function

Level 1

Depicts the skeletal E2E Process (e.g. “Lifecycle View”)

Level 2

Captures a high-level event sequence of steps in Group

Level 3

Adds Interactions Flow steps result in the Process variants

Level 4

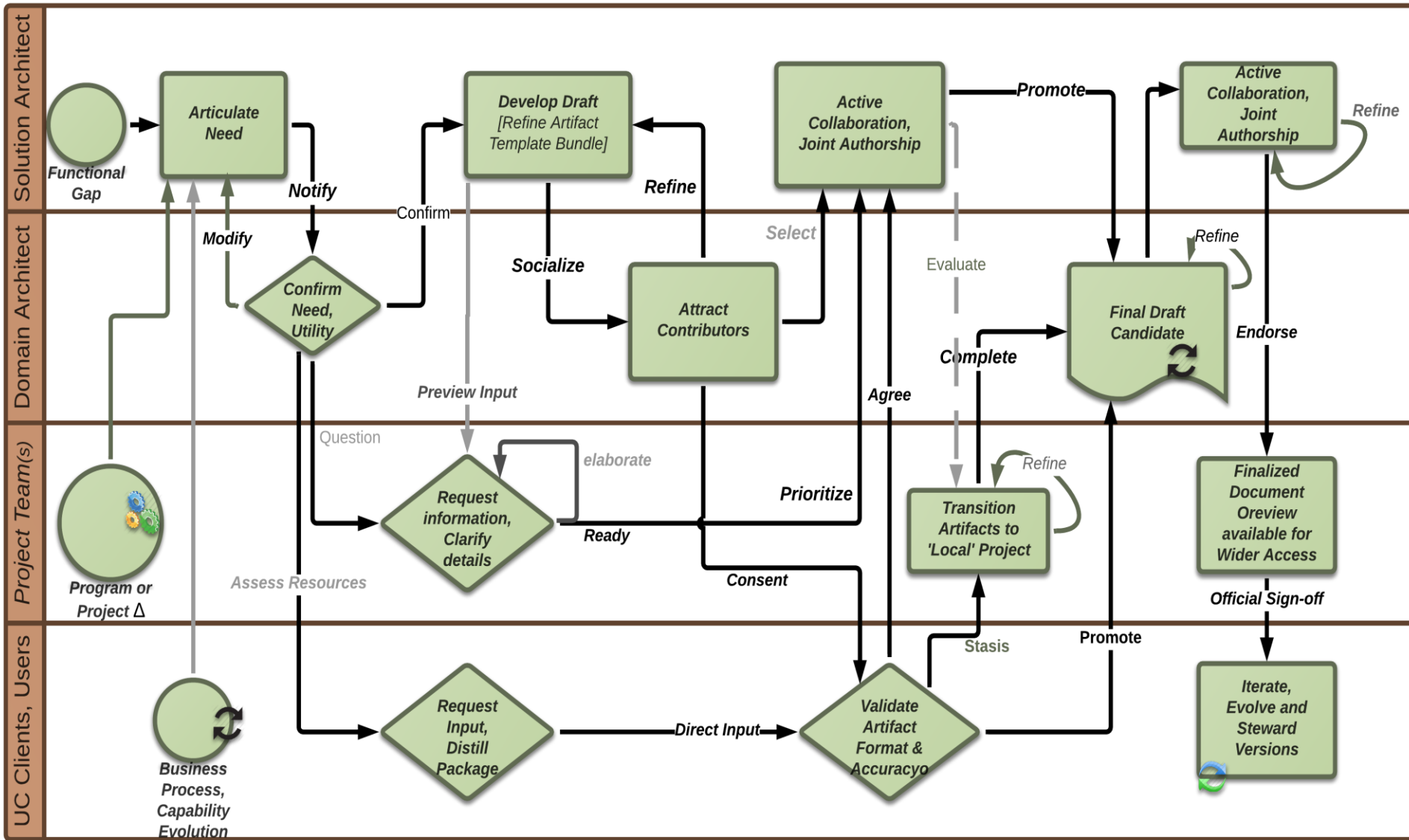
Contains granular details including integration/transitions to/from other processes, logic and data transformation[s]

Best Practices Set 1: Shaping Effort

Select and Design models for easy uptake, adoption
Tailor capture effort, approach, roles to fit the scope
Choose wisely for stewardship, and asset evolution

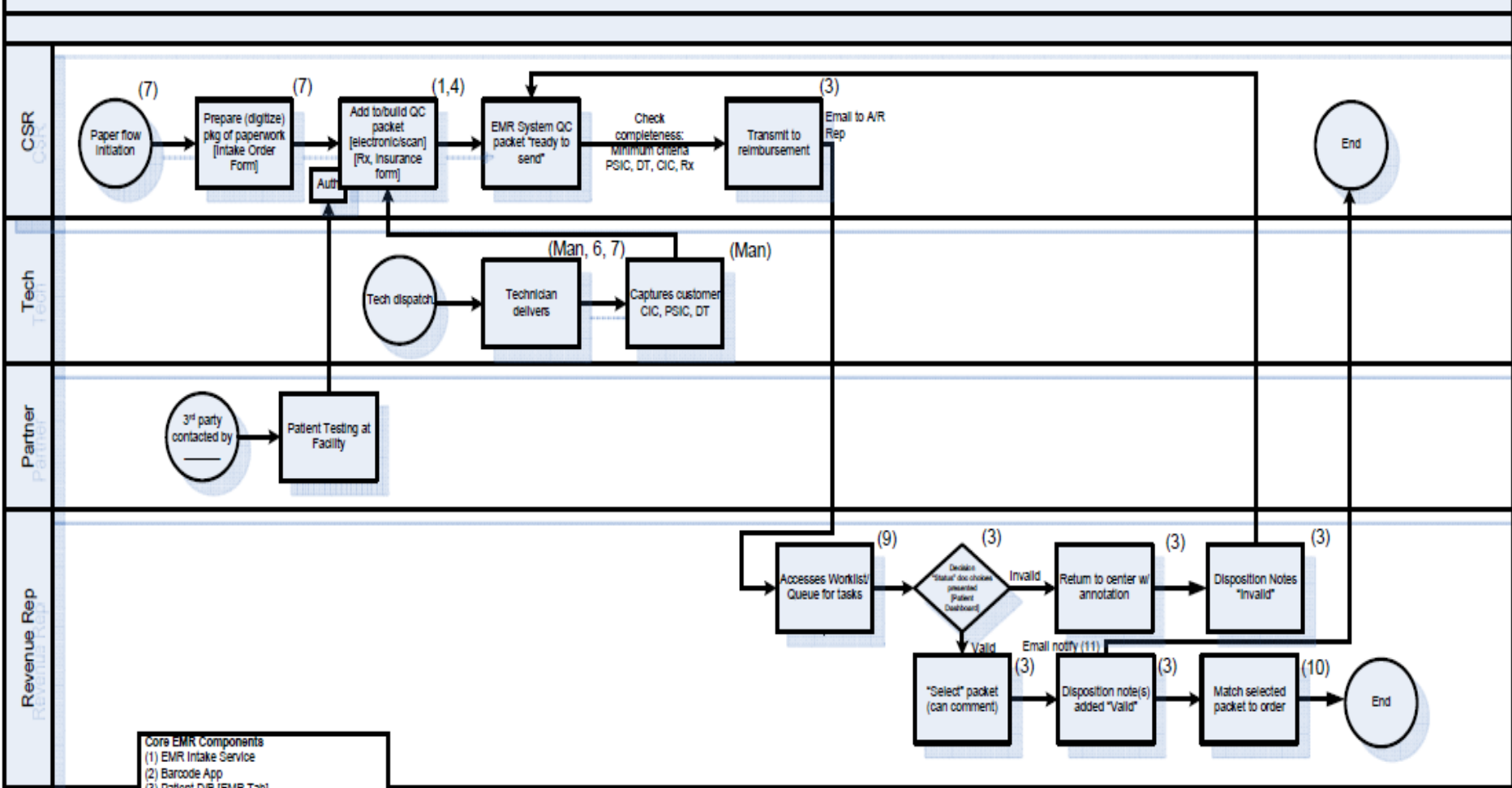
Select Appropriate Models for Uptake

UC Solution Architecture Engagement Model



Select Appropriate Models for Uptake

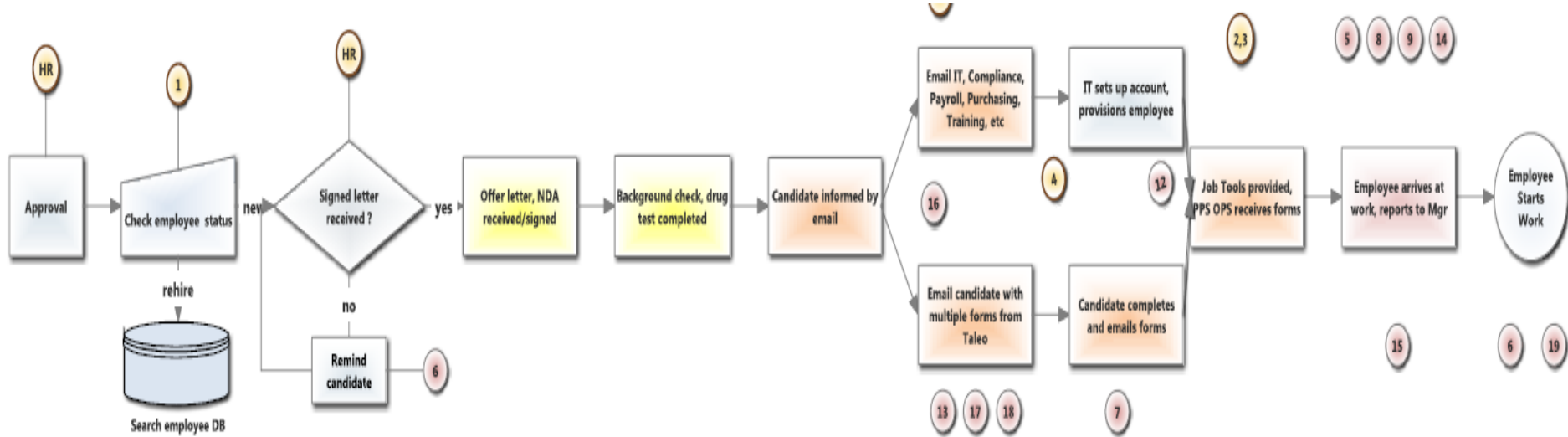
O2 Paper Flow



- Core EMR Components**
- (1) EMR Intake Service
 - (2) Barcode App
 - (3) Patient D/B [EMR Tab]
 - (4) RightFAX (Appliance)
 - (5) Barcode W.S. Interface
 - (11) Email Custodian Service
- Order Entry**
- (6) TIMS.net API
 - (7) "Ticket App"
 - (8) Misc. Components
- Revenue Task Management**
- (9) Revenue DB
 - (10) TIMS

= Integration Point

Select Appropriate Models for Uptake



Tag/ID	Role/Person	Action
HR	Recruiting Team	Oversight
1	Admin	ADP Entries
2	Finance	TIMS Entry (PCC)
3	Operations	SFDC Entry (PCC)
4	IT Helpdesk	

Tag/ID	Idea	Actions
5	"Receiving party" for first day arrival	
6	Standard hire dates	"cadence" start dates
7	drive a "deadline" for doc completion	
8	Assisted document completion	
9	standard training on PPS resources and benefits	deepen attachment w/ self-guided learning

Tag/ID	Concern	Comments/Remedy
10	Equipment Collection	Not closed loop
11	Equipment Assignment	Not logged for accountability
12	Need standard template/equip. package setup	capture assignment details into forms to Present on receipt at HD
13	Efficiency	Template letter, Process communication to hiree
14	Protocol for 1st day (Mgr communication)	Standardize communication protocol
15	Professional/Repeatable experience	

Tag/ID	Comments	Sugg. Action
16	Clear communication	Standardize communication protocol
17	Multiple Employment docs confusing	Unify and index/label or glossary
18	Email is not synch- follow up not assured	directly contact prior to start date
19	Time to contribution	OJT, shadowing and learning resources

KEY	
	Hot spot 1
	Hot spot 2
	Hot spot 3

Tailoring the Approach to Your effort

Decide where the effort begin, prepare to justify Why

Assign and relate the context of chosen focus Domain

Clarify and articulate the business Value and impact

Factor in [larger] Audience roles in model groupings

Assign specific roles and strong stewards at outset

Best Practices Set 2: Framing / Context

Include context view as keystone/departure point
Framing the domain[s] and priority of functions
Ongoing: tailor model set for extended team inclusion

Set Context and Frame the Domain

Overview

Set “mode” as a viewpoint and a critical anchor

Define/Name each demonstrated business Value area

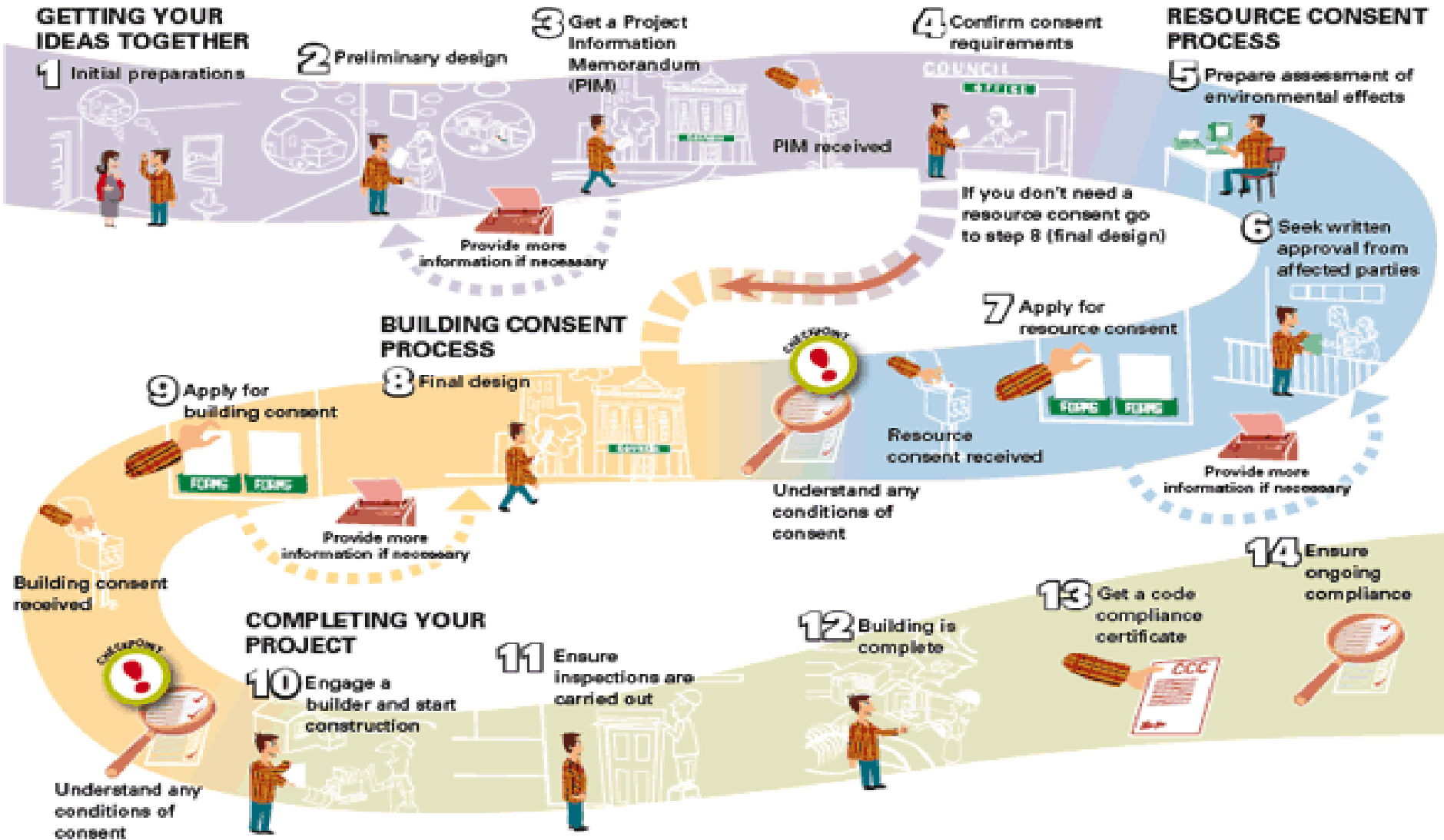
Finalize the scope of the Domain targeted for elaboration

Narrate the transitions and adhere to “Levels”

Context Approach 1: use a MindMap



Context Approach 2: E2E (Level 1) Process



Example: Expressing BV of Focus area

Business Objective

1.0 To manage cost, time, safety and quality during design, planning and implementation of a new building addition.

[Functional] Areas

1.1. Contractor Certifications and Authorization

1.2. Hiring and Resource Coordination

1.3. Materials & Supply Management

1.4. Construction and Quality Certification

1.5. Financing and Program Management; 1.6: Site Safety/Mgmt

Key PIs and Metrics

Build Progress, Task/Component Complete, vs. Spend, Speed/Quality (defects, rework, etc.); Utilization (vs. idle)

Key Events and Milestones

Plan Approved, Work Auth., Break Ground, Phases of Completion

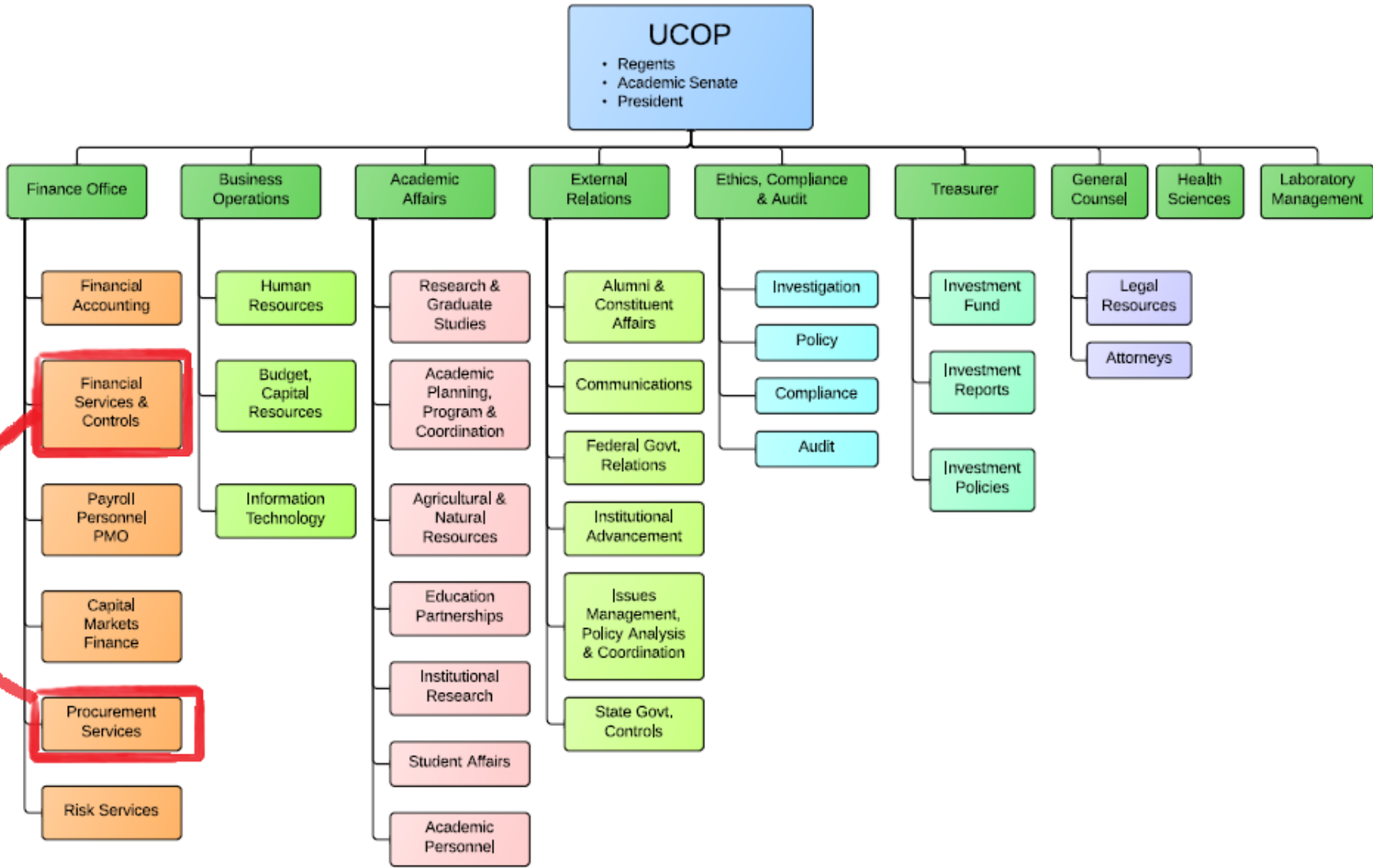
Framing a Domain

Anchor to correlate the Business Value

- Know what business results are expected when function's related processes are performed well
- Understand the dependencies / interplay between the process sets that comprise functional areas
- Know the business impact when outcomes are not as expected (i.e. Quality) or as documented.

Context Setting using Domain/Org model

Enterprise Function
Focal Context



Appropriate Context (indicators)

Effort matches the scope, objective(s)

- Facilitation style and participants paired/assigned to appropriate roles by skill-set, fitness to task
- Capture method, tooling and accessibility paired to expected collaboration strategy or work styles
- Level of capture detail assigned based on on parties' process understanding or area of focus

Optimize the Model Set

Content + Context yields engagement

- Choosing the right level[s] to encourage input
- Openness to new information and validating to encourage higher levels of clarification, accuracy
- Choosing Visually appealing models encourages Ownership, usage and ultimately, wide circulation

Best Practices Set 3: Facilitation & Flow

Facilitator skills, style and role enforcement
Role Assignment, work results communication
Guiding to successful conclusion and output

Facilitation Do's and Don't

Always:

Encourage team to interact/bond outside of work session
Call Session to Order and track: time, place, notes, issues
Remind overall context regularly, and hold space for
Try to engage a separate modeler or “whiteboarder”.
Feel free redirect attention back to overall goal/context

Never:

Redirect discussions about step order, begin/end points or hidden elements.
Interrupt, disparage or challenge within session
Discourage privacy or sidebars out of session doors
Allow attention-seekers to capture the momentum

Facilitation and Flow

Start with the value or challenge: **“Motivate”**

- Target gaps, to derive real cost and project benefits
- Try selling up chain – to gain Executive Buy-in

Scope and set capture expectations: **“Direct”**

- Short circuit confusion, resistance and sabotaging
- Align with corporate direction and initiatives
- Solidify value by narrating key insights throughout

Model following of a capture process: **“Coach”**

- Onboard all new members with a quick review
 - Iterate and demo the capture steps and approach
 - Accepting all info until solid/agreed, keep iterating
-

Mapping practices - applied

Positive interactions to guide accurate mapping

- Engage key process-function leads early for added momentum;
- Partners / clients often can deepen context and scope
- Outline first the essential steps, role-interactions, and info inputs of the process in order to arrive at a group result
- State expected products or target “effects”.

Choosing the Team Members

Important to begin effort with key process leaders

Set expectations and level-set the intent of effort

To facilitate recruitment as champion: stay in guiding/service role (begin with end in mind)

Process Mapping core roles

The following are the roles most instrumental in Mapping work:

- **Facilitator*** – guides the process/discussion path
- **Modeler*** – organizes steps in sequence, builds model
- *Stakeholder* – Business sponsor + interested party
- Steward – Manages the evolution of the process/functions. Responsible for currency/update
- Process Lead – Is fully aware of function and key steps/events in the process map
- *Documenter* – annotates, captures details, context
- SME – historic, human workflow perspective
- *Architect* – delineate system, internal interactions

Modelling / Flow tips

“Process Capture” *Session Success Factors*

- Follow the process delimiters and endpoints
- Always try to keep conversation moving**
- Maintain detail and level consistency
(even in drafting/initial capture sessions)
- Identify / track information “soft spots”
 - Validate / edit output through Process SMEs & Leads
 - Replay and recapture variants in bundles/sets to verify
 - Accuracy over speed, and conversation vs. dominance

Modelling / Flow tips

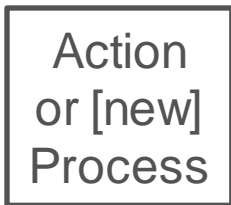
“Process Capture” Session Success Factors

Target an attainable end-state for time allotted:

- Decide on what will be captured and how
- Preset several steps to tone the tense/level
- Capture only when all key roles are present
- Assign/Ensure participant role-performance

Basic symbols reprise *(with some new uses)*

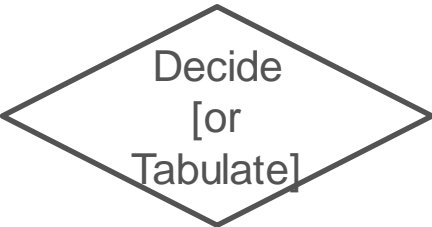
Common symbols and optional utility:



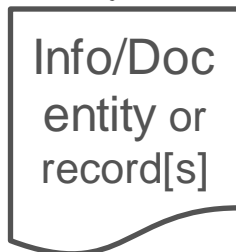
Activity or Task [Step] – denotes a procedure, function or series of them, depending on nesting level



Terminus – can represent a starting/ entry point or end of the Process, depending on location.



Decision – indicates conditional logic, with either values, events, choices or calculations.



Document – denotes organized input, output of information flowing into or out of a step.

A few newer Symbols *(useful, not essential)*

Some BPMN 2.0 Symbols of importance



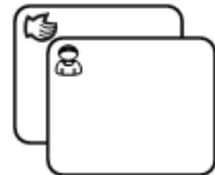
Activity or Task [Generic Step] – denotes a task or a function or [or subprocess] like this →



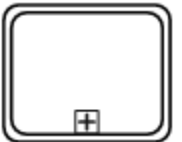
Call Activity and **Send Message Task** → can be used to invoke other process / subflows.



Send, Receive Task – shows organized output, influx of info, from/to; **Bus. Rule Step** →



Manual Step, Human Step, System Transaction



Data: Out, In, Doc, Repo – indicates info interactions of out/in-bound message, info-doc and data store

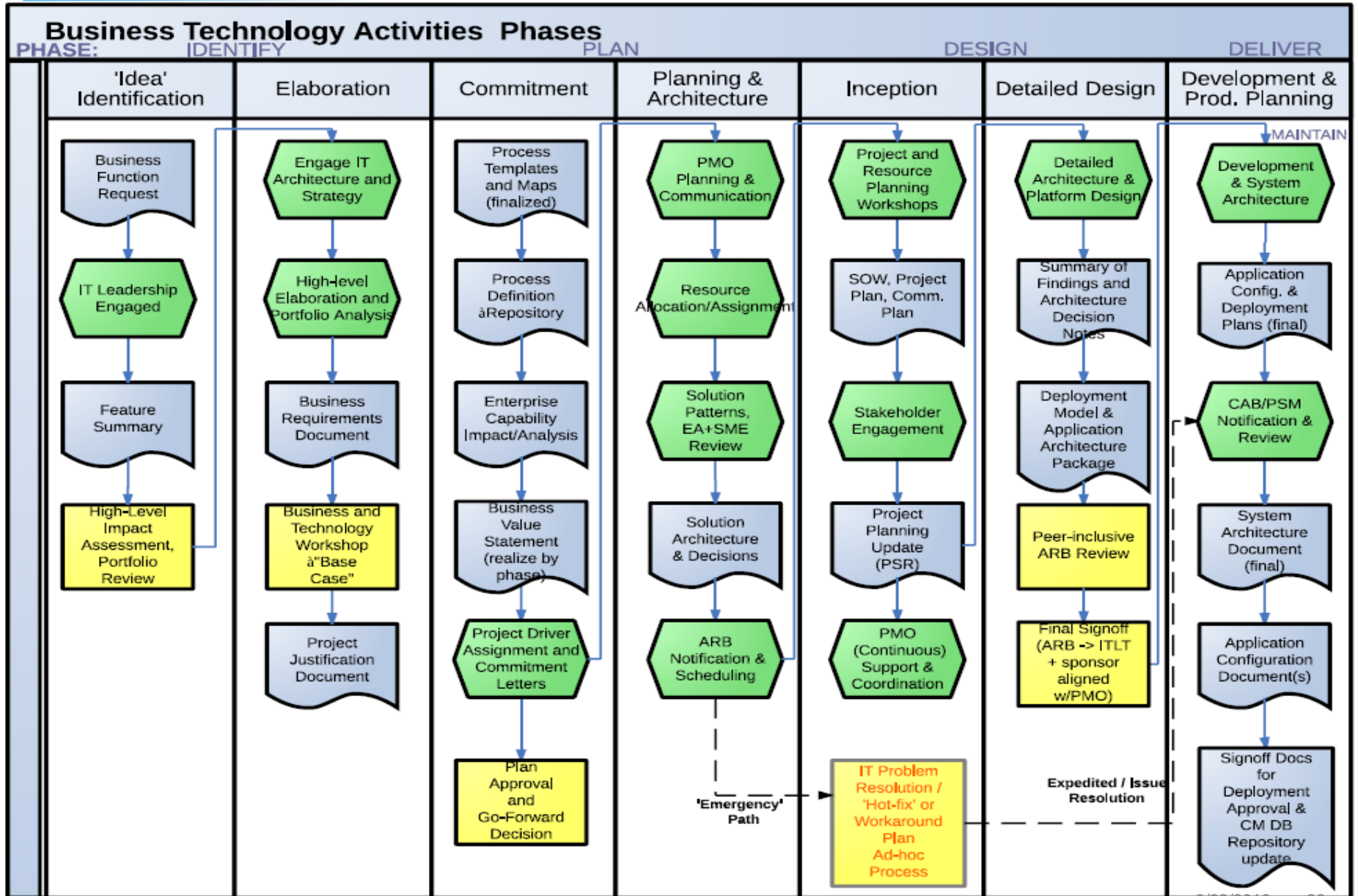
→ **Artifact Group** – *dotted line enclosing box*

Setting appropriate Context

Focus on Ease of Uptake

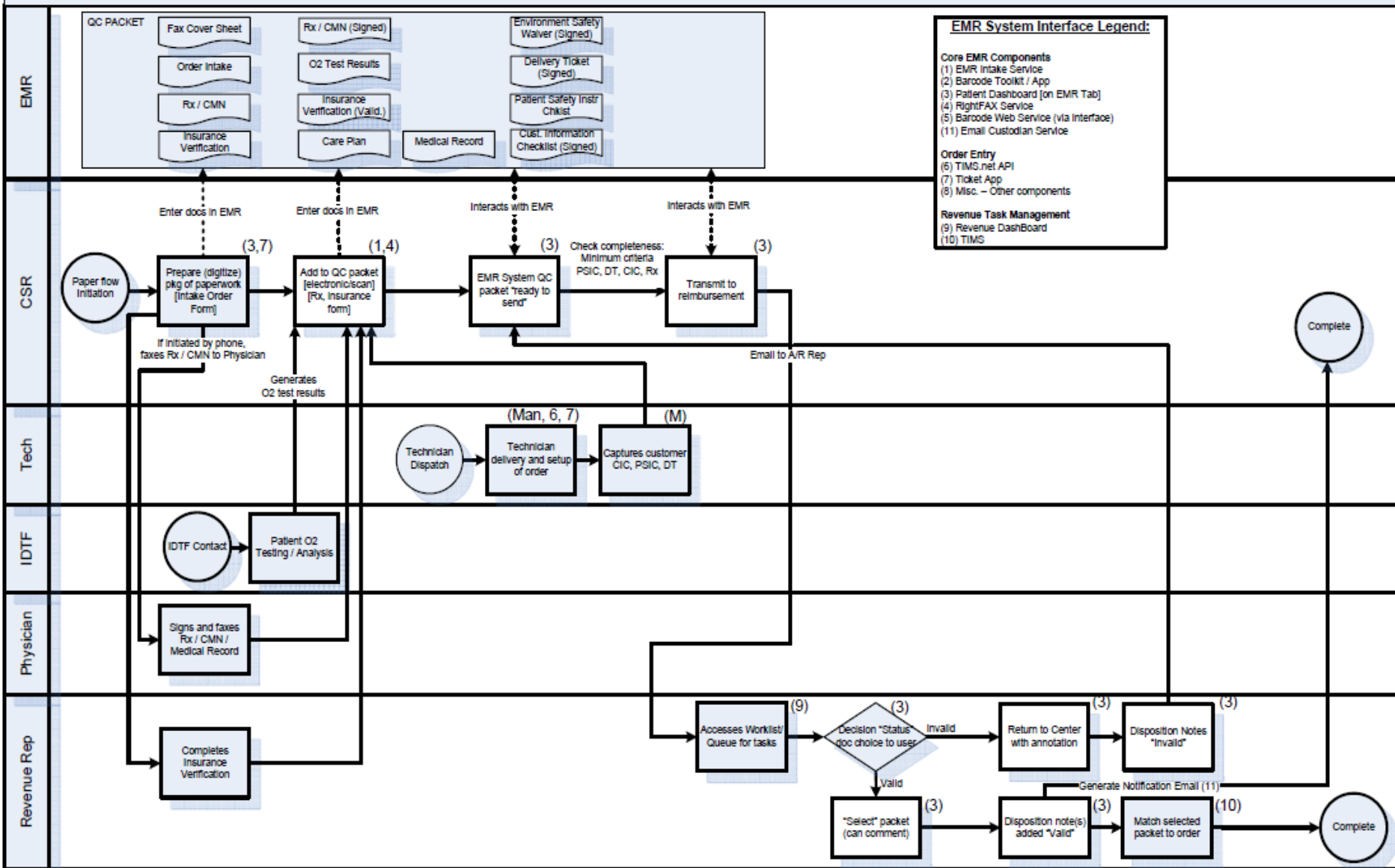
- Visual content appeal will ensure high ‘Mileage’
- Language / notation adjusted to audience level
- Overall: modifiability and appeal for clarity and group edits, collaborative annotation to refine

Variations on Completed Work



Process Diagrams & Formats

O2 / Nebulized Medications Paper Flow



Above has been ordered, assigned to swimlanes and fully organized by system/info set

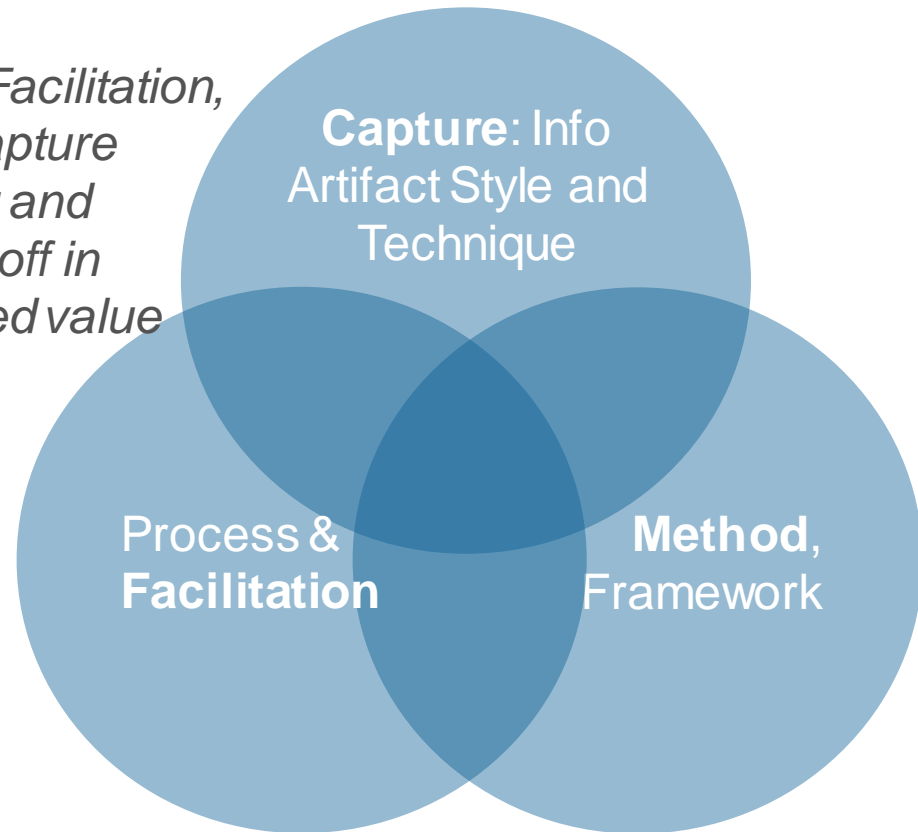
Process Capture: *Completion Indicators*

When to publish your work product

- Initial [draft]: Start, stop points are known, each stage defined by (event) appropriate interaction types
- Interim: All 'swimlanes' have activities: **Actors** from each have reported in – changes support the others.
- **Finale:** *All comments and tweaks will taper off, go to publication; uptake and consumption true measure*

Ultimately, Success in Mapping requires these elements working in synergy

Team curation, effort, and good Facilitation, Method/Style, and following a Capture Process, and skill at aggregating and organizing Artifacts always pays off in final product quality and perceived value



How to Jumpstart your team's efforts

Where do I turn for help with Process Mapping

@ UCOP: ITS EA and PMO contacts

Prepare your short synopsis of the context, need and target domain, send to Jonathan Kahn or Jerome McEvoy or Greg Goldbach

@ Berkeley - BPAWG – Business Process analysis working group, best practices / networking with peaching Analysts.
Contact: Isaac Mankita

Q & A ...

Mapping Process for Insight - 301

*Preview/Glimpse of Part 3+
Advanced Mapping Techniques*

How to Select Appropriate Scope for Objective
Interplay of Tools w/ Process Mapping approach
Defining and Promoting [Org] Stewardship
Cross-linking Models; Annotation method
Living Processes and Running Models
Process Stewardship: Theory and Context