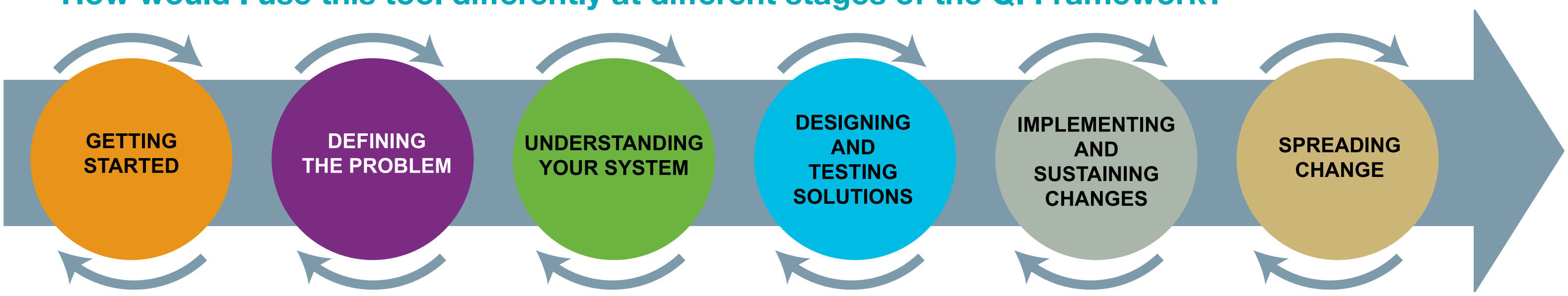
Process Mapping INSTRUCTION

Why would I use this tool?

A Process Map is a visual display of the exact steps within any process and of the individuals or groups responsible for each step. By visualizing how the entire process currently works, it becomes easy to identify inefficiencies, duplication, variation, and unnecessary steps, and thereby opportunities for improvement. Process mapping should be used any time the QI Team is focusing on a particular process, and especially when a process is determined to be unclear or inconsistent. This tool also sparks good ideas and helps a team to know where to start to make the improvements that will have the greatest impact for customers and staff. It generates awareness, discussion and engagement and provides a perspective broader than what is written in a policy, or what the process is assumed to be. By involving staff in the process redesign, it promotes clarity and ownership.

How would I use this tool differently at different stages of the QI Framework?



	To map out the process or processes related to the aim you have chosen and to analyze and determine problem areas.	To gain an understanding of the processes or roles that impact the problem.	To provide clarity and a shared vision of how the process should look for testing and training.	To ensure that all staff understand the new process and their accountabilities related to it.	To understand the variance in processes in different areas, and the impact of the new process design.

How do I use this tool?

1. Identify the process you intend to map.
2. Identify the staff members that “touch” or are “touched” by the process. It is important to have a fair representation of those who are directly involved or affected by the process you want to improve. Also include some “customer” representatives that are affected by the process.
3. Cut a piece of butcher paper roll (about 4–5 feet long) and affix it on a cleared wall. Place sticky notes on it as you map the process.
4. Identify the beginning and the end of the process. To help with this, try thinking of trigger(s) that start the process and milestone(s) which indicate that the desired process outcome has been produced. Once identified, these will be indicated with oval shapes or “terminators.”
5. Define each process step with an action word and indicate who does this action (e.g., “Registered Nurse sends medication list to pharmacy by fax”). Each process step will be a square.
6. Use arrows to connect all process steps and terminators. Draw arrows on sticky notes rather than on the butcher paper—you may need to re-arrange process steps as you map your process.

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7. Identify decision points and define each decision point with a question (e.g., "Is the correct Tena product available?"). Decision points will be indicated by the use of a diamond shape.
8. Ensure that each decision point has two arrows coming out, representing the answers "Yes" and "No" to the question. The arrow with the "Yes" answer will always continue horizontally towards the right, while the arrow with the "No" answer will always continue vertically down. Make sure that there is a process step following both arrows.
9. Validate the Process Map. Ensure that individuals familiar with the process review it for clarity and content. Discuss their input with the team.
10. Draw the finalized Process Map using available software.

Once the Process Map is complete, the next step is to conduct the analysis that will help the team to understand the opportunities for improvement. Questions to encourage the QI Team to ask include:

- What types of waste do we see?
- Where do we see it?
- What are the slowest parts of the process?
- Who or what is waiting? What is she/he/it waiting for?
- What are the most chaotic parts of the process?
- Are the right resources used?
- What drives the process?

Materials

- Butcher paper roll
- Tape to affix paper on cleared wall space
- Coloured sticky notes pads (use different colours for process steps, decision points, etc.)
- 1 marker for each person

Timing

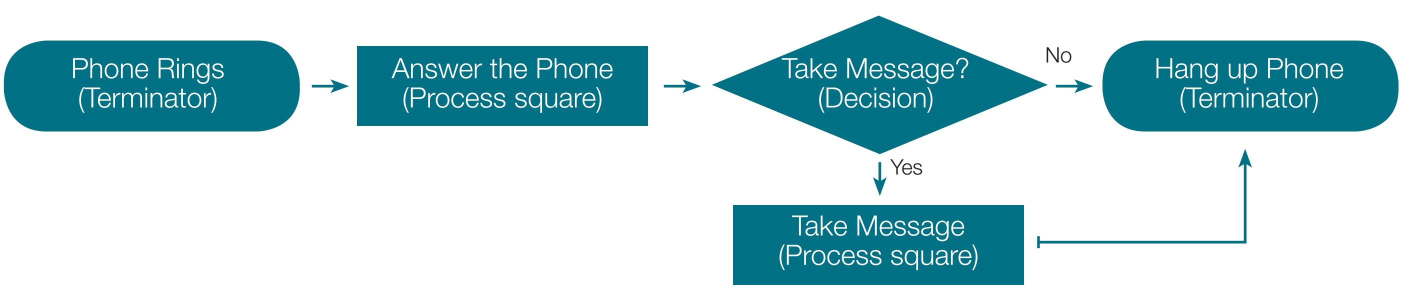
Plan to spend about two hours process mapping. Spending more than two hours may indicate that the level of detail of the map is too great or that the scope of the process improvement work is too big. Spending less than one hour may indicate that the level of detail of the map is too superficial and that you may be missing some important steps.

Setup

- Bright, ventilated meeting room
- Clear wall space in the meeting room
- Clear floor space by the wall where the map will be created

Create a safe environment where it is OK for team members to say how activities are being done in reality as opposed to how the activities are supposed to be done. Ask management to actively listen to the staff.

Determine an appropriate level of detail for your Process Map. Too much detail will increase the size of the map and may generate confusion during the mapping process. Too little detail may result in missing steps and activities important to the process. Since the purpose of improvement work is to improve workflow and to simplify the movement of people and information, include all moves and delays in your Process Map.



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