Job Aid: Process Mapping

Overview

Process mapping, also called workflow mapping, allows a practice to "see" an entire work process from beginning to end.
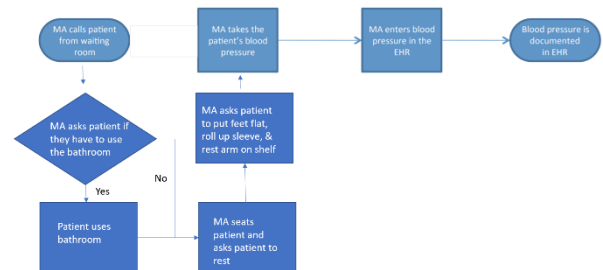
When to use process mapping

Use process mapping to help a practice remove waste and errors, make workflows more efficient and effective, to standardize work, and to train staff and new hires. Also use process maps to clarify roles, improve communication among team members, and increase accountability of each individual or department involved in a process.

Types of maps

A simple process map shows how a process works in a few steps and is useful for providing a simple overview of a process.

A detailed process map shows detailed steps for each task in the map.

A swimlane diagram or process map shows the roles and specific actions of different individuals (or departments) in the process and the places where handoffs occur.

Process map symbols

⬭ Start or end of process ◆ Decision

▪ Action ➡ Arrows (direction of flow)

Steps for mapping processes

1. Gather your materials, including sticky notes and pens.
2. Identify start and end points of the process. There may be more than one end point.
3. Write each step of the process on a sticky note using the correct symbol.
4. Create "swimlanes" for each staff person involved to show their actions.
5. Move steps into the correct order, into the right swimlanes, vertically stacking actions that are done at same time, and add arrows.

Techniques for facilitating a mapping processes session

1. Be inclusive when deciding who should attend. Include representatives for all the types of people involved in the process. Remember the adage: "No change about us, without us."
2. Have the person who owns a particular step "hold the pen" when mapping processes. Remind participants to use appropriate symbols, stack actions that occur at same time, and reevaluate the start and end points. Encourage everyone to participate.
3. Have participants review and revise the steps until everyone agrees with the map. Remind the team to map the process as it currently, not as they wish it were. Do observations if needed. Take a photo of the finished map on your phone to save it.

Steps for redesigning processes

1. Ask the practice to review the process. Ask probing questions.
   - Where does the process break down? How can this be prevented?
   - Are there unnecessary or redundant steps that can be eliminated or combined?
   - Where are the bottlenecks or delays and how can these be fixed? Are there steps that could be done simultaneously?
   - Is there a more logical way to sequence the steps?

- What knowledge, skills and resources do the individuals and teams doing the tasks need to do them well?
- Should someone else be doing the task?

2. Generate ideas for improving the process. Have a team member add, remove, change actions and decision points on the "current state" map to incorporate improvements. Ask the team to reflect on the impact of changes.
   - What impact would changes have on other processes?
   - How will changes affect staff and patient experience?
   - Will changes improve the quality of the care delivered (e.g., make it safer, more equitable, more effective)?
   - Will changes affect the practice's finances?
3. Encourage everyone to participate. If the group gets stuck, try brainstorming techniques to help the practice generate improvement ideas.
4. Use Plan Do Study Act cycles to try out changes before full implementation.

Tip

- Impromptu mapping sessions can be very valuable when it's not possible or necessary to convene a team. Carry sticky notes in your pocket or bag to make these possible.