







WHAT IS PROCESS MAPPING?

A Process Map is a visual display of steps within any process. It illustrates who *owns* each step in a process and clearly identifies when hand-offs or communication flows between individuals. By visualizing the current state of processes, it becomes easy to identify inefficiencies, duplication, variation, unnecessary steps and missing steps. Process mapping generates awareness, discussion, engagement and a broader perspective across the team. It also can help identify what in your process may be worth measuring to get a better understanding of the work.

PROCESS MAPPING STEPS

- 1 Identify the staff members who *touch* or are *touched* by the current care planning process you are mapping (e.g. care planning, registration, intake, referral, etc.). It is important to have representation of those who are directly involved or affected by the process you want to improve. Include patient representatives as they are the recipients of the process.
- 2 Use sticky notes posted on the wall or on a large sheet of paper to map the process.
- 3 Identify the beginning and the end of the process. Think about triggers that start the process and milestones.
- 4 Define each process step with an action and indicate who does this action (e.g. registered nurse reviews medical history). Each process step will be a **rectangle**. Consider using different coloured sticky notes or markers for each role to help visually define who is doing each action.
- 5 Use **arrows** to connect all of the process steps.
- 6 Identify decision points and define each decision point with a question (e.g. is the patient interested in participating in a care planning appointment?). Decision points will be indicated by the use of a **diamond**.
- 7 Draw two **arrows** coming out of each decision point to represent Yes and No. The Yes answer continues horizontally towards the right, while the arrow for No goes vertically down. Process steps should follow both arrows.
- 8 Validate the process map by having individuals familiar with the process review it for clarity and content. Discuss input as a team.
- 9 Create an electronic version of the process map using available software (e.g. PowerPoint, Word, Visio, etc.).

ELEMENTS OF A PROCESS MAP

-  **OVAL** - Start and end of a process
-  **RECTANGLE** - Individual process steps
-  **DIAMOND** - A question or decision point
-  **ARROW** - Direction or flow of the process



CONTACT INFORMATION

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ANALYSIS

Once the process map is complete, conduct an analysis as a team to identify the opportunities for improvement.

Reflect on the following questions:

- 1 What types of waste do we see (e.g. redundant steps, over processing, re-work)? Where do we see it?
- 2 What are the slowest parts of the process? Who or what is waiting? What is the wait for?
- 3 Where do *pain points* occur for individuals involved in the process (e.g. missing information, lack of clear hand-off of tasks)?
- 4 Can the process be done in some other way or different order?
- 5 Are the right resources used? Is the right person doing each task?
- 6 What or who drives the process? Who is ultimately responsible?

A good process map will prompt you to say *Aha!*, leading to interesting discoveries, ideas and potential solutions to problems. Furthermore, creating a process map will give team members greater clarity and understanding of how their activities contribute and are affected by the larger system. This is especially true when individuals work together in constructing one.



OPTIONAL ACTIVITY: MAP A FUTURE STATE

After mapping the current state and identifying opportunities for improvement, consider taking the work one step further by creating a future state map to illustrate what the process could look like after making targeted changes.

Questions to consider upon completion of this task:

- Did you reduce the number of steps or hand-offs involved? Or simplify the process?
- Is there clear ownership at each step in the process?
- Are appropriate team members involved and working to full scope?
- Are there clear signals indicating hand-offs of tasks, responsibilities and/or communication from one process owner to the next?
- Have you reduced or eliminated the pain points in your process?

