**Process Mapping**

**A visual documentation (picture) of the sequence of steps in any process**

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**WHY**

To improve a process, you must first see and understand the process.

* See - The process map is visual. Visual information is a more efficient way of communication.
* Understand
  + Help everyone to see the entire process and their place in the process
  + Clearly define the current process or variation in the process; Understand what is actually happening
  + Identify wasteful steps and inefficiencies
* Improve
  + Improving the process by eliminating the wasteful steps and/or reordering the steps for maximum efficiency
  + A visual picture of the future (improved) state PM can be created & communicated
  + The improved PM can be used as a tool to orient new staff & train according to new standard work

**WHEN**

Throughout the DMAIC process:

* Define - to capture current state
* Measure & ANALYZE - to understand the waste, bottlenecks & inefficiencies identified
* Improve & Control - to capture & communicate the future (Improved) state

**HOW TO**

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| 1. *Prepare for Process Mapping* |
| (Also see “QI Collaborative Pre-Workshop Planning and Preparation” Tool)   * Establish & engage the key stakeholders * Define the process to be studied * Identify all the cadres who will be involved in (i.e. touch) the process. Invite one representative from each cadre to participate in the process mapping sessions. * Prepare Materials – Flip Chart paper, markers, self-stick notes * Complete logistical details – location, date, time, place, transportation & Invitation * Assign a scribe who will transcribe the paper-based process map into an electronic format |
| 1. *Draft Process Map & Table – Current State (in a Conference Room)* |
| * Develop a first draft of the process map using self-stick notes/flipchart paper   + Begin by obtaining the high-level steps in the process   + Allow all cadres an opportunity to share their perspectives on the process * Complete draft process table by identifying:   + What happens at each step   + Who performs the activities   + Time for each step (approximate range)   + Documents/Forms for each step   + Identify “Opportunities for Improvement” (OFIs) |
| 1. *Go & See* |
| * Observe the care process to validate the process map   + Walk to observe each step of the process   + Speak to the person who performs the process step   + Ask the person:     - “What happens here?”     - “Who is responsible?”     - “Approximately, how long does it take?”     - “What forms are needed?”   + Record your findings in the Process Table   + Look/Listen & Record all OFIs   + Move to the next step in the process * Each team member will record the process steps (process table) and any OFIs (self-stick notes) |
| 1. *Update Process Map & Table – Current State (in a Conference Room)* |
| * + Using the collected information, validate or update the draft process map (flip chart & self-stick notes) as needed   + Using the collected information, validate or update as needed the draft process table   + Create an electronic version of the Process Map/Table – Current State (e.g., PowerPoint or Visio)   + Circulate to team members to assure accuracy and a clear representation of the current process |
| 1. *Place Opportunities for Improvement (OFIs) Self-Stick Notes on a Flip Chart (in a Conference Room)* |
| * Collect OFIs on Flip Chart in preparation for next steps: Brainstorming 🡪 Affinity Diagram 🡪 Prioritization of OFIs using the Impact/Effort Grid |
| 1. *The Improved Process – The Future State Map* |
| * After the new process is established, prepare & distribute the Process Map - Future State to highlight the outcomes of the improvement process to the team & stakeholders * Post the Future State Map on Learning Board to show/train staff in the new process, i.e., the new way to work |

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| **TIPS**   * Capturing the Current State – Use pose-it notes on flipchart paper to facilitate discussion and modification until an accurate “picture” of the current process is captured. If you need to send the process map to someone, take a picture of the flipchart and email it. * Capturing the Future State – At the end of the project, document the improved process with a future state map., a required deliverable for the project. |

**Templates:**

* Process Table

**Associated Tools:**

* QI Collaborative Pre-Workshop Planning and Preparation
* Brainstorming / Affinity Diagram
* Impact Effort Grid
* Standard Work

**Resources:**

http://www.ihi.org/resources/Pages/Tools/Quality-Improvement-Essentials-Toolkit.aspx

 **Process Table**

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| --- | --- | --- | --- | --- | --- |
| Process step | What happens? | Who is responsible? | Duration | Forms/logs | Opportunities for improvement |
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