**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*
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| (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
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| 1. *Draft Process Map & Table – Current State (in a Conference Room)*
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| * 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)
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| 1. *Go & See*
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| * 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)
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| 1. *Update Process Map & Table – Current State (in a Conference Room)*
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| * + 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
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| 1. *Place Opportunities for Improvement (OFIs) Self-Stick Notes on a Flip Chart (in a Conference Room)*
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| * Collect OFIs on Flip Chart in preparation for next steps: Brainstorming 🡪 Affinity Diagram 🡪 Prioritization of OFIs using the Impact/Effort Grid
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| 1. *The Improved Process – The Future State Map*
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| * 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.
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**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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