



Go With the Flow

A standard method to understand and revise
your processes

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Why Bother?

Why take the time and effort to analyze existing processes that work?

Processes are mapped for one of two reasons¹:

- To resolve a business problem
- To realize a business opportunity

¹ *Swimlane Process Mapping*, p. 22



Typical Problems or Opportunities¹

- Existing process is not formally documented.
- A problematic process needs to be improved.
- Formal procedures need to be developed for a cross-functional process.
- A merger or acquisition requires integration of processes.
- A new information system or enhancement is being planned.

¹ Paraphrased from *Swimlane Process Mapping*, p. 22



Information-Development Activities That Require a Process Analysis

- Merge processes from multiple departments.
- Redesign an existing process to handle modular content.
- Describe current processes to content-management developers.

How Do I Start?



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Determine Requirements

Consider:

- What are the expectations for the project?
- Who will receive the information?
- What level of detail is required?
- What terminology is required?



The NonStop Assignment

- Create a new business process for modular content.
 - Analyze and document the current process.
 - Develop a new process that accommodates legacy material and modular content.
- Present the new business process in a format that meets developer requirements.
 - Create a flowchart.
 - Use Content-Management System language.
 - Have clear hand-off points and metadata.



Who Will Do the Work?

- Do you need a team leader?
- Who is responsible for the work?
- Who understands the objective and can communicate?
- Do you need someone from each organization involved, or will the project owner interview others?



The NonStop Team

- Editing manager (team lead), who was interested in the project, willing to learn, and detail-oriented
- Writing managers (two of four groups represented)
- Publishing process manager
- Three writers, including one with extensive lead experience
- On call: Software architect and a content management developer



Start With What You Know

Whether you are fixing a problem or creating a new process, start with the current or “as is” process.



How We Started

- The team compiled a list of document formats we publish (FrameMaker, online help, etc.).
- The team split into subteams based on document format.
- Subteams interviewed writers and analyzed processes for a specific document format.
- In parallel, subteams began to create “as is” graphic flowcharts for different document formats.



What We Discovered

- We expected to create one graphic flowchart for each document type to encompass all users and processes.
- It quickly became a nightmare!
- We discovered the *Swimlane Process Mapping* book and started reading it....



The Swimlane Concept

Swimlane process mapping is a method for documenting cross-functional processes.

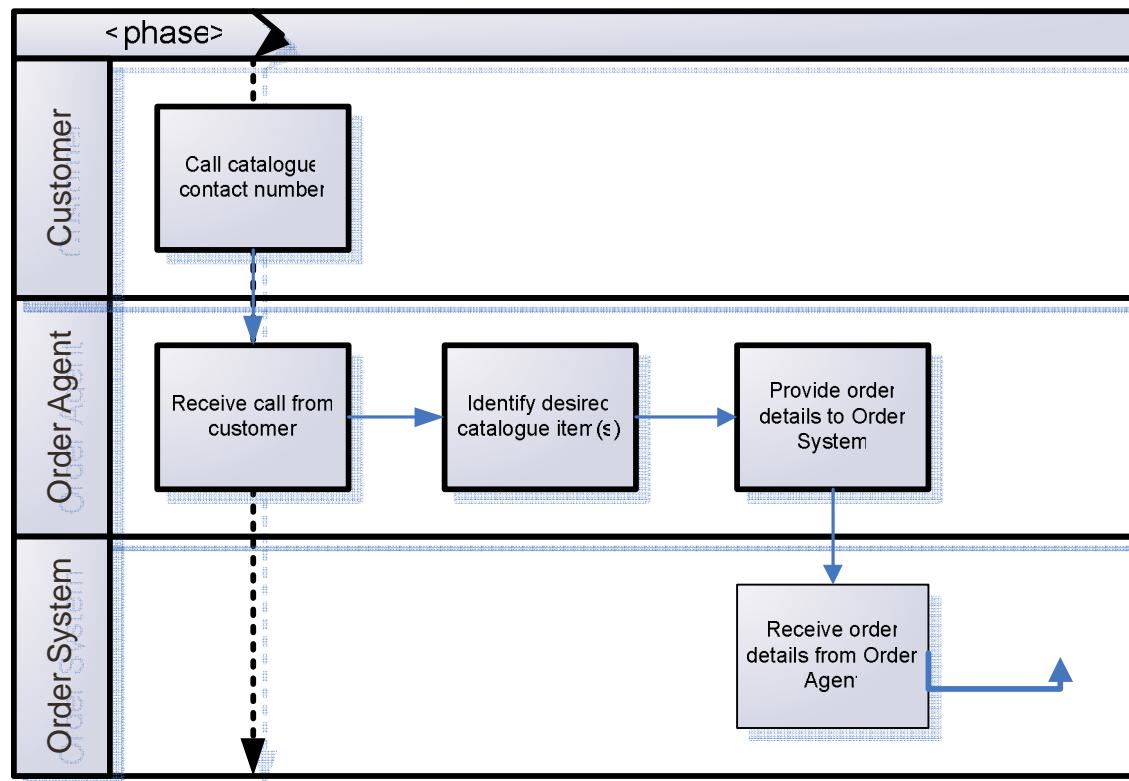
Selling a product:

- Sales
- Order entry personnel
- Order system
- Manufacturing
- Delivery

Creating documentation:

- Lead writer
- Writer
- Editor
- Writing manager
- Content Mgmt System
- Publishing System

Organize Process Map by Role





NonStop Variation of Process Map

- Graphic flowcharts can be limiting and overwhelming to create.
- Team leader created a template using an Excel spreadsheet:
 - Well-known tool
 - Easy to use
 - Lots of room for words



Spreadsheet as Process Map

Role	Phase1	Phase 2	Phase x	Phase x+1
Customer	Call catalogue contact number			
Order Agent	Receive call from customer	Identify desired catalogue item(s)	Provide order details to Order System	
Order System				Receive order details from Order Agent



NonStop Master “as-is” Map

- Team leader shared the spreadsheet concept with the team.
- Subteams mapped “as is” process for a specific document format.
- Team reviewed maps for different document formats and decided that only one “as is” map was needed.
- One team member consolidated individual spreadsheets into one master map.
- Entire team reviewed master “as is” map in a meeting and made changes in real time.
- Team leader edited final map and filled in the gaps.

26-Jun-02	1	2	3	4	5	6	7	8	9	10
PROJ, PROG, or CORE TM	Initiate Prog/Proj							POD: Approve (incl Pubs Dir)	Phase 0 exit	
WRITING MGR		Longterm planning (probability, sizing, sched)	PRP: Review/ approve (Prod Rel Plan) <=>	Assign writing resources <=>	opGet PET codes	opPOD: Review				opPRD: Review
LEAD WRITER		Longterm planning	PRP: Review		Get PET codes and give to writers and editors	POD: Review/inspect				PRD: Review/ inspect
WRITER		Longterm planning	opPRP: Review			opSelect/create Genesis queue	Get part number <=>	opNotify mgr of start project <=>		
FMT ex										
OL_Gd ex										
OL_Hlp ex							Get T-num in some cases			
PEER WRITERS										
EDIT MGR										
EDITOR										
DEV		Longterm planning								
CTSG										
EXPT/DOC CONTROL										
LEGEND: op optional <=> can occur earlier or later < can occur earlier U iterative										



After the As-Is Map Is Complete

- Review the spreadsheet map with all stakeholders.
- Update spreadsheets, as appropriate.
- If required, you can:
 - Create a graphic Swimlane chart of your entire process.
 - Create graphic Swimlane charts of portions of your process.



The New NonStop Business Process

- Found that three maps were needed to map the new business process:
 - Content unit
 - Module
 - Document
- Created content unit spreadsheet first; adapted it for module and document.
- Determined what would be automated.
- Identified entry and exit criteria for each stage in the business process (for automation).
- Created flowcharts for automated workflows (for example, review cycle).



Lessons Learned

- Select the right team.
- Schedule time to learn project requirements and terminology.
- Acknowledge that it takes time and communication to consolidate disparate processes. (The “as is” map took four times longer than planned.)
- Keep it simple.
- Don’t try to do everything at once—use a phased approach.



Select the Right Team

- Team members should be:
 - Interested in the project and open to change
 - Detail-oriented
 - Able to spend at least 20% of their time on the project
 - Able to grasp new technology (if moving to a new system)
- A team leader should be able to:
 - Motivate others
 - Communicate with the developers
 - Set agendas and document team decisions
 - Keep meetings moving



The Book and What It Covers

Swimlane Process Mapping, Jane C. Frazier,
Frazier Technologies, Inc., 2001

<http://www.fraziertech.com/index.htm>

- Planning the effort.
- Defining process scope (what triggers each event or process step).
- Preparing for and conducting interviews.
- Creating and validating the process map.



Glossary

Process: set of tasks that has a definitive start and end

Tasks: activity that is expected to happen

Roles: the people or systems that participate in a process

System: Nonhuman participant in the process

Hand-off: the act of passing output from one role to another (for example, from writer to reviewer)

