

Process Mapping

FOR EFFICIENCY & CROSS-
TRAINING



University of Colorado

Boulder | Colorado Springs | Denver | Anschutz Medical Campus



Sam Lester

FINPRO HELP DESK TRAINING
CONSULTANT
Office of University Controller
System



Kathy Illian

DIRECTOR OF FINANCE &
ADMINISTRATION
Department of Neurology
Anschutz Medical Campus



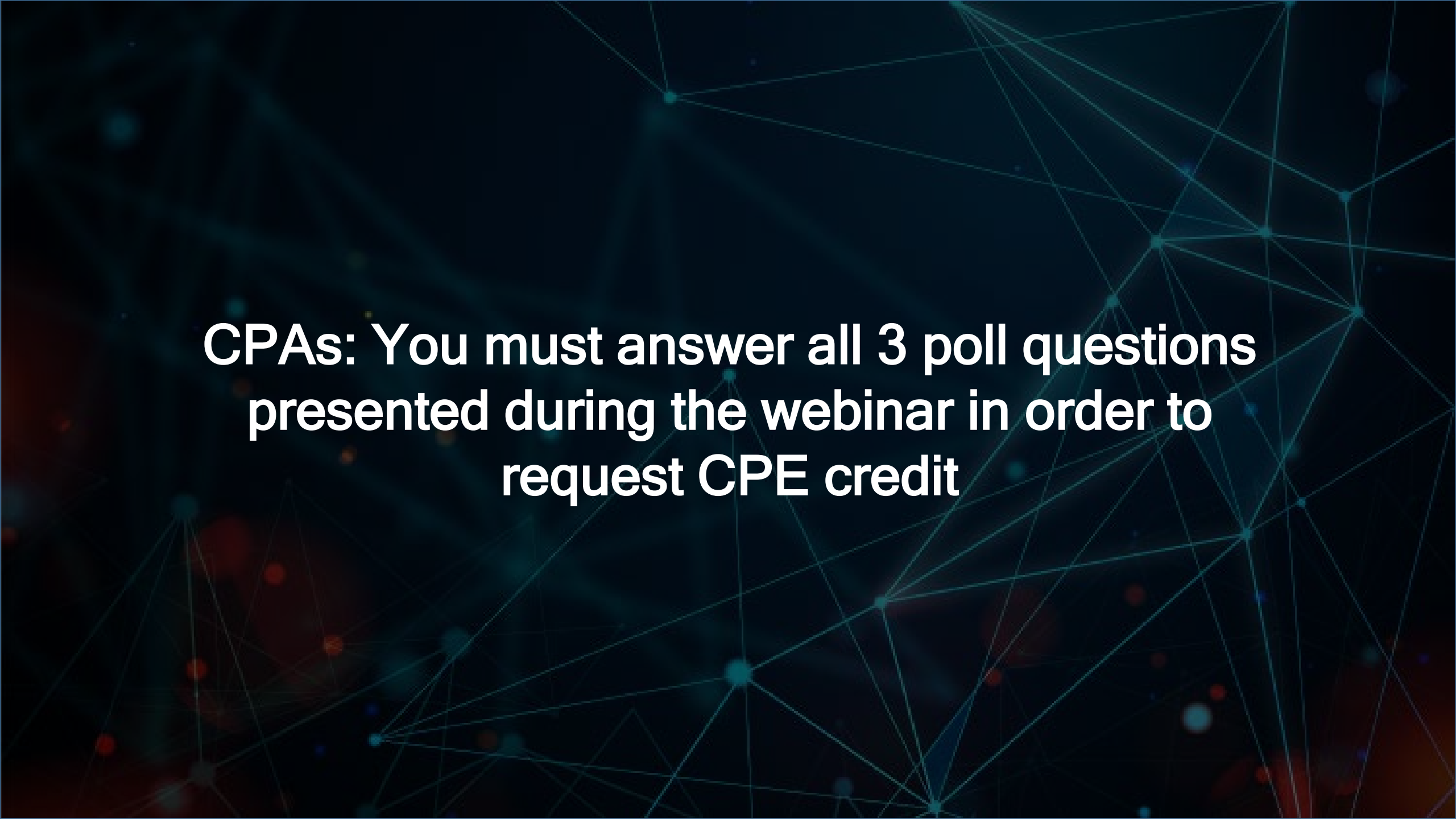
**How this
webinar works**

**We'll share a
recording of this
webinar**



**We'll have some
interactive polls**
(let's try one right now!)





**CPAs: You must answer all 3 poll questions
presented during the webinar in order to
request CPE credit**

Poll Question

How does your organization
train new staff?



**Now on to
the show!**



**Why did Kathy start
process mapping?**



THE *NEW YORK TIMES* BESTSELLER

THE **CHECKLIST** MANIFESTO

HOW TO GET THINGS RIGHT



PICADOR

ATUL GAWANDE

BESTSELLING AUTHOR OF *BETTER* AND *COMPLICATIONS*

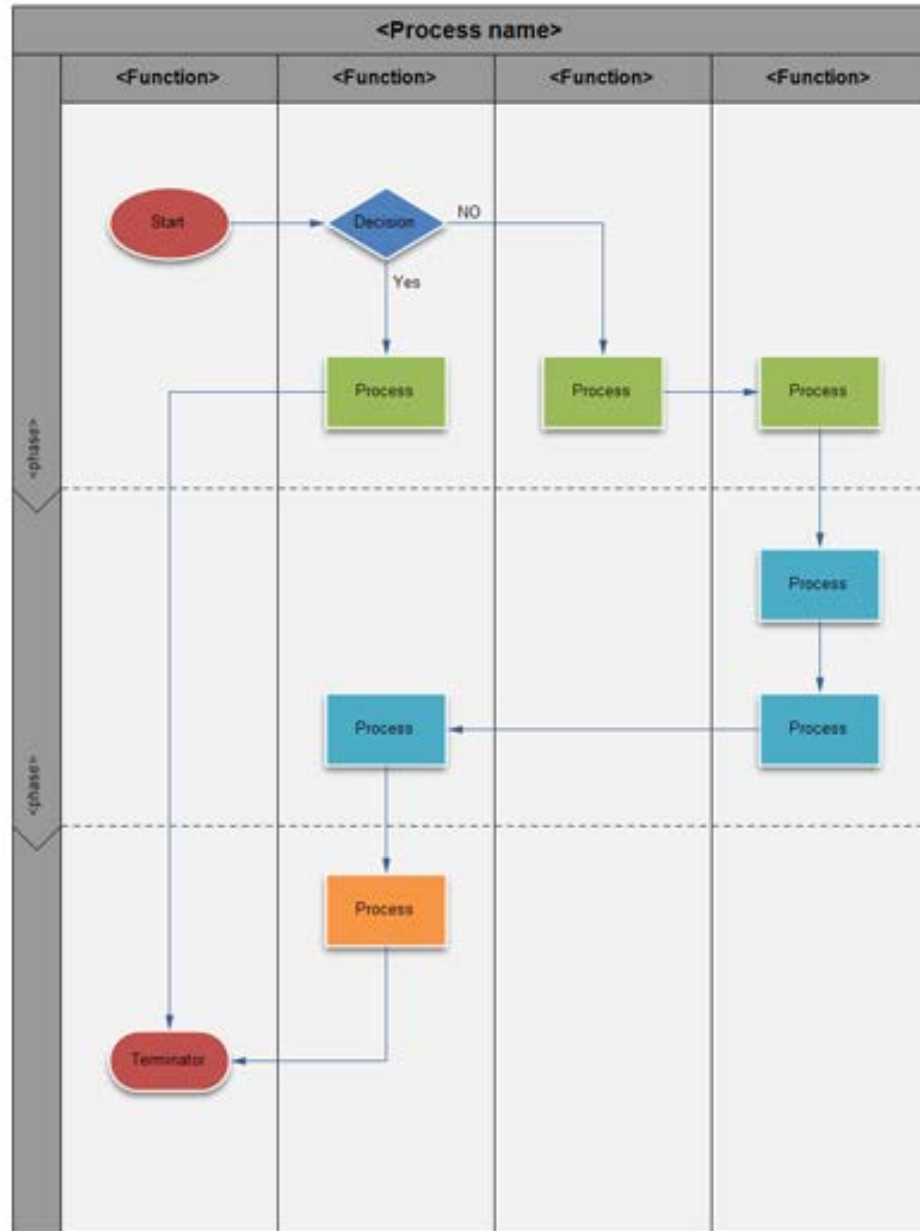


**In order to
improve a
process you
must first
understand it!**

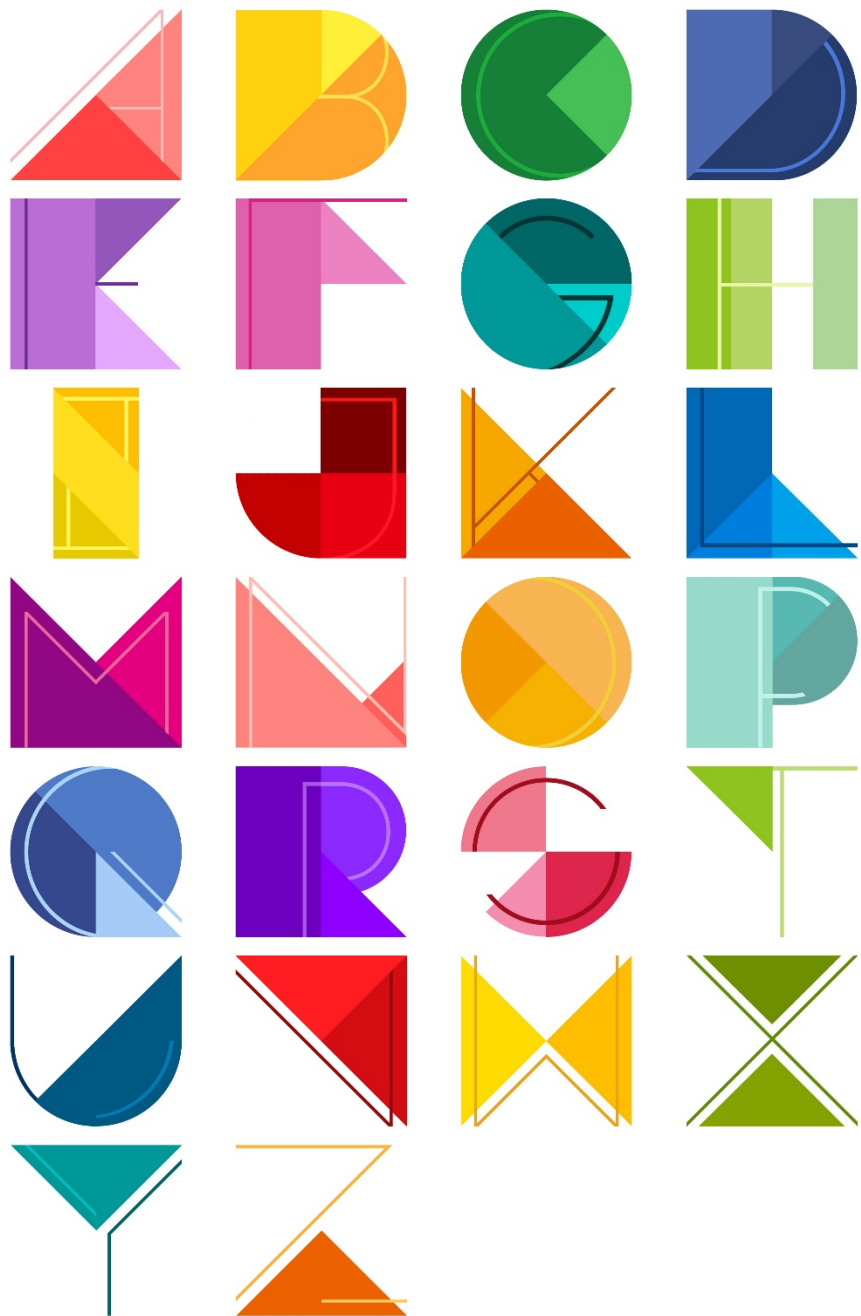


What exactly is Process Mapping?

Cross Functional Flowchart Template



Process Mapping is the development of vertical swim lane diagrams that detail, in a visual fashion, the tasks, decisions, and timeline of each work function, by each participant or organization involved. These maps are developed by a diverse group of administrative personnel, some of whom have no prior knowledge of the function - perfect for the objectivity needed.



**Why use
symbols,
shapes and
colors?**

“It’s best that you do not go into this office space because you do not have a badge and that means you are not allowed to enter.”

vs



People learn faster and better from words and pictures, as opposed to words alone

WHEN?

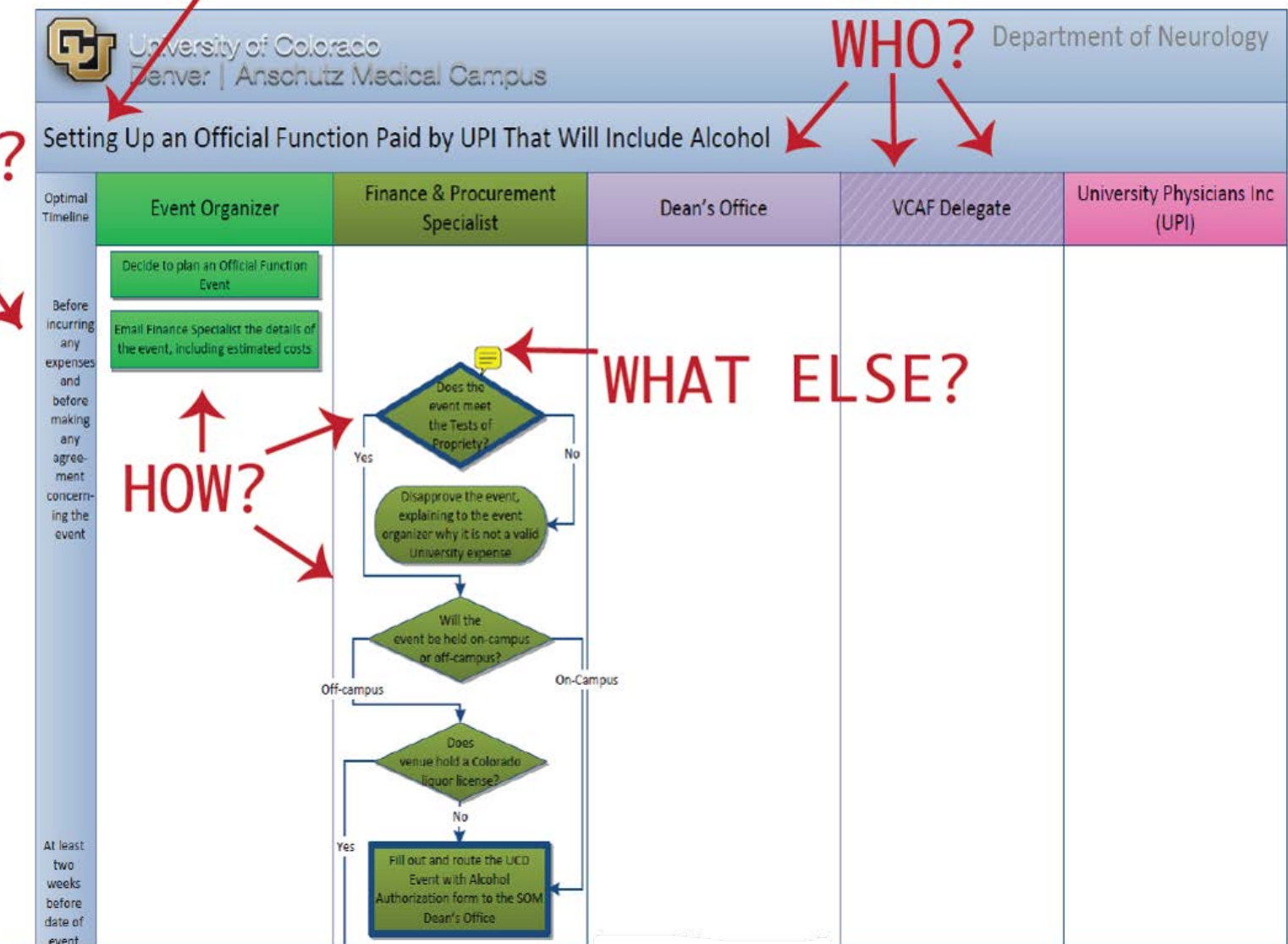
WHAT?

WHO?

HOW?

WHAT ELSE?

A process map gives you all the details, in order, of a function



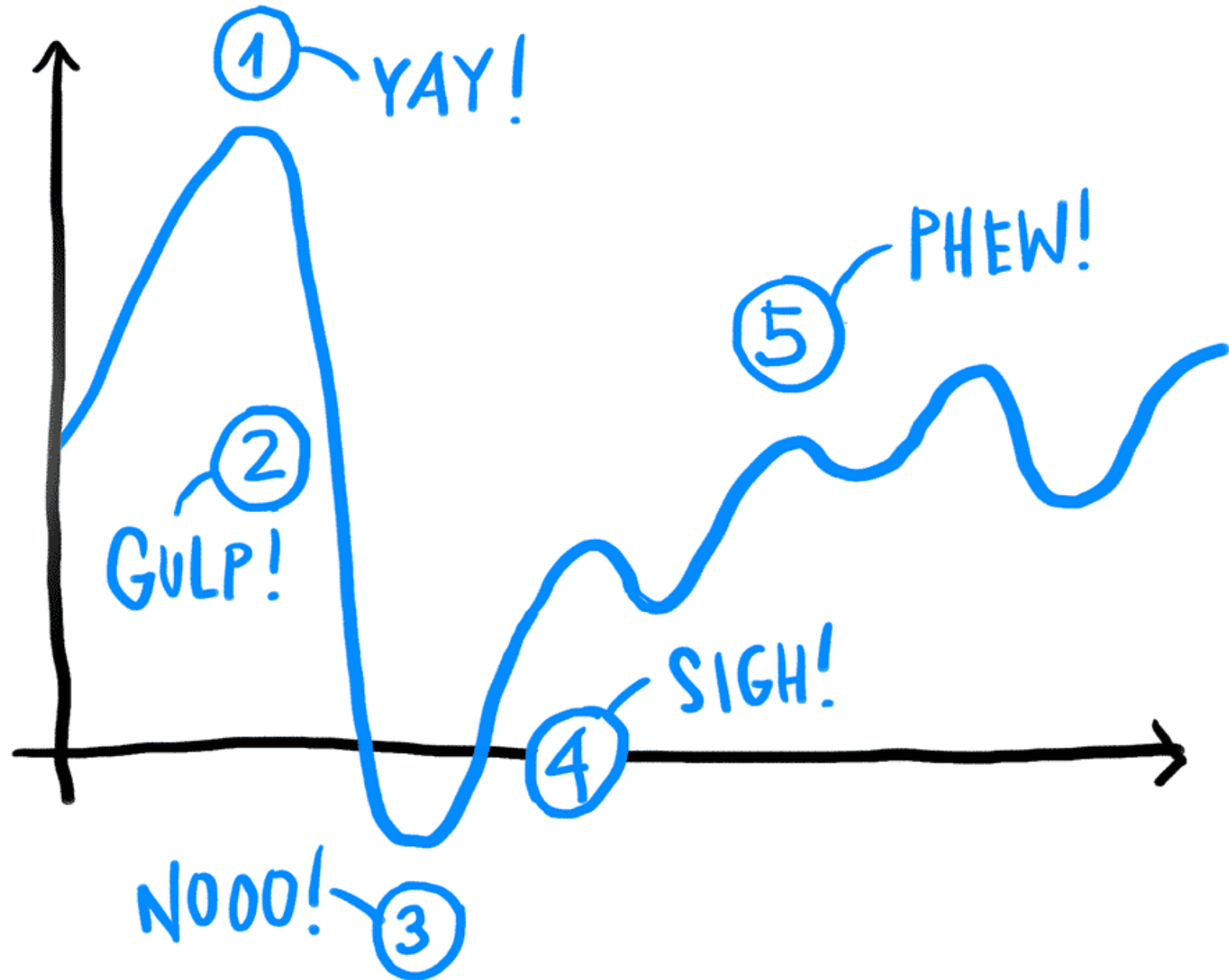
Poll Question

What are the traits of a well-trained employee?



The goals of process mapping

Develop training materials that shorten the learning curve for (and instill confidence in) new hires





Capture
institutional
knowledge

**Provide checklists for
critical functions to
ensure deadlines are
met**



What can process mapping do for you?

In addition to providing “How Tos,” Process Mapping development has a few unanticipated but welcome outcomes

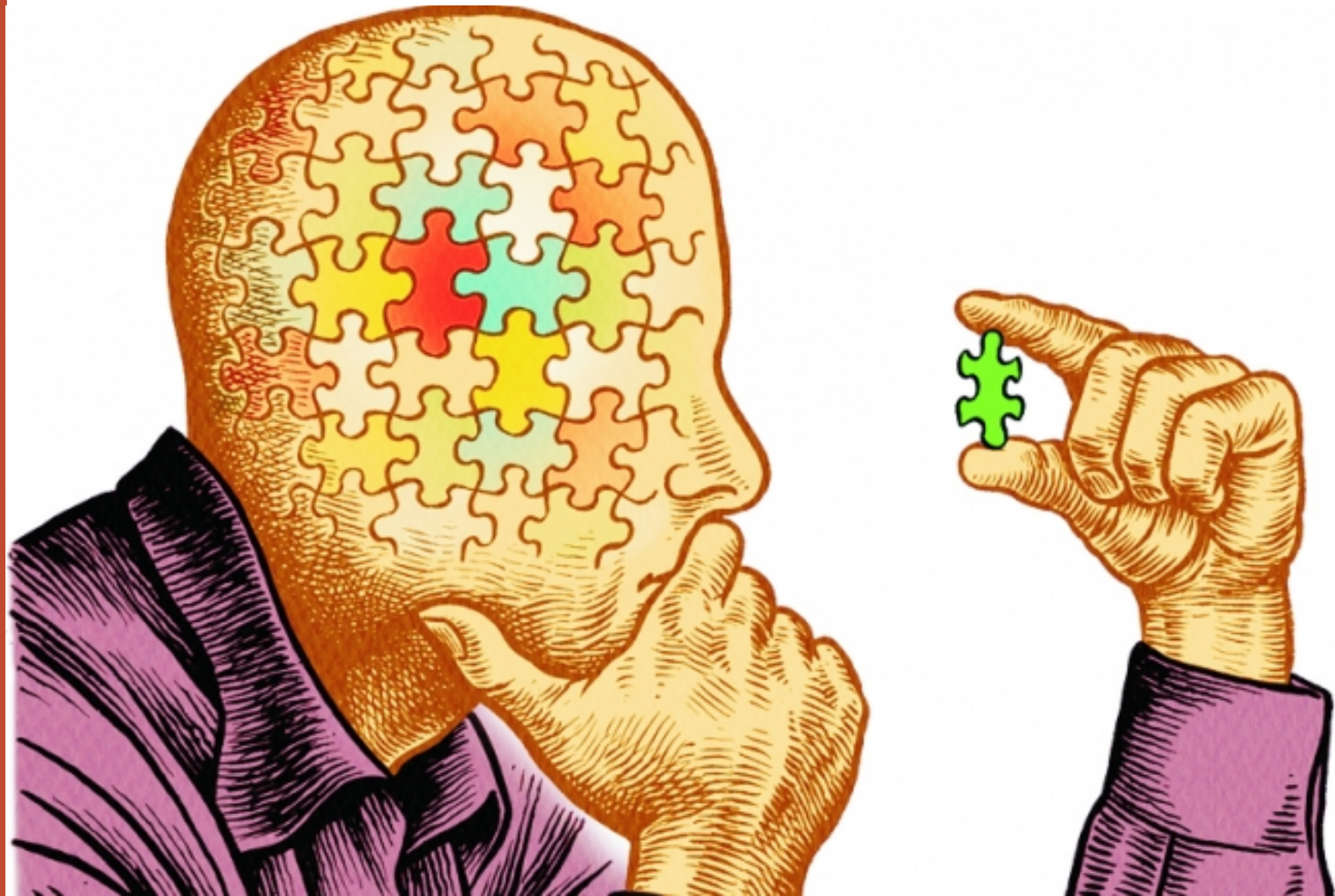
Teaches and encourages *system thinking*



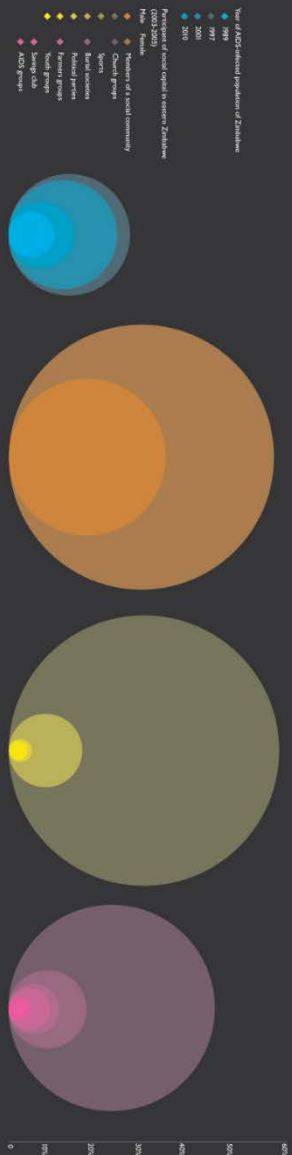
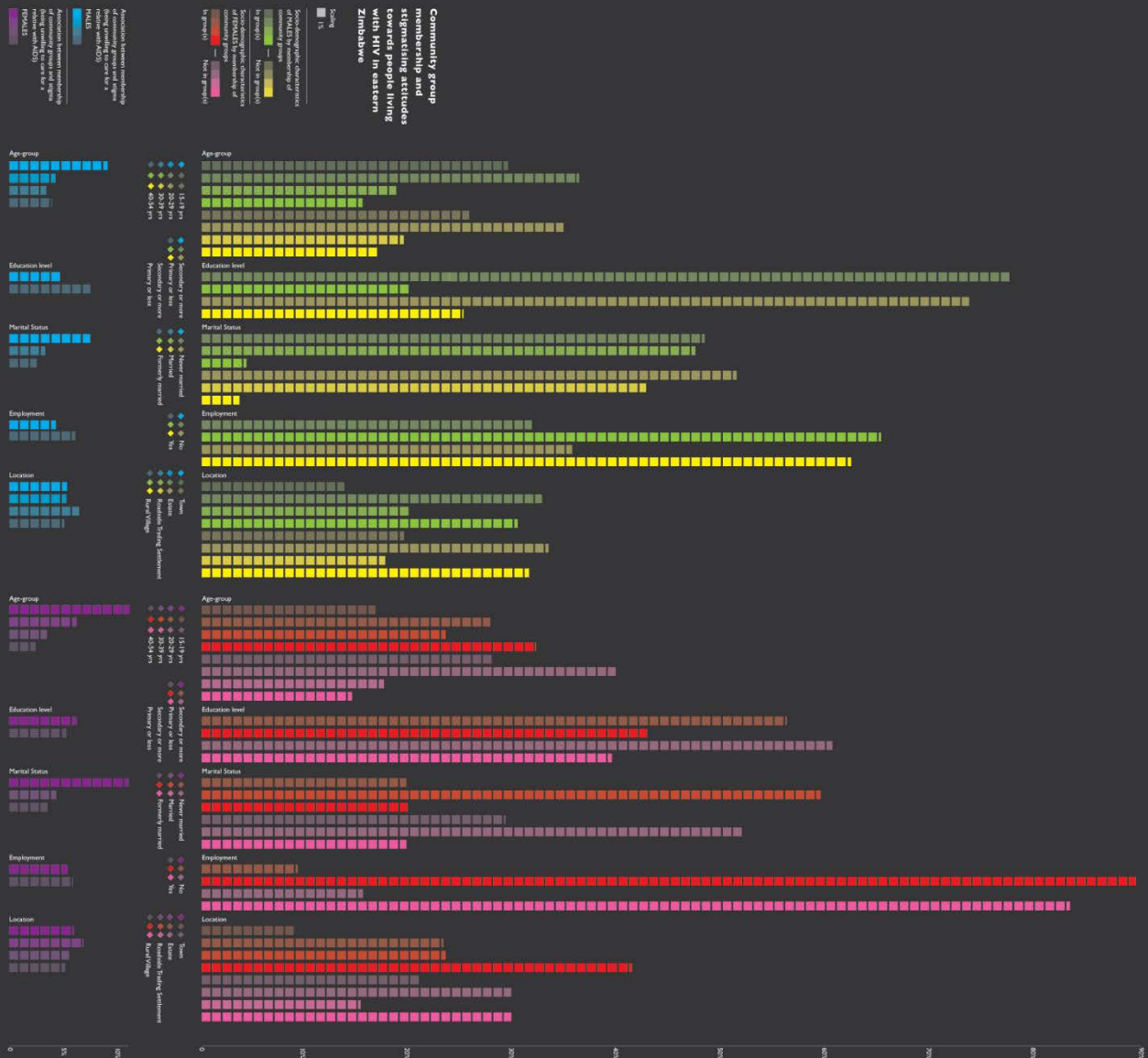


Fosters a
team spirit

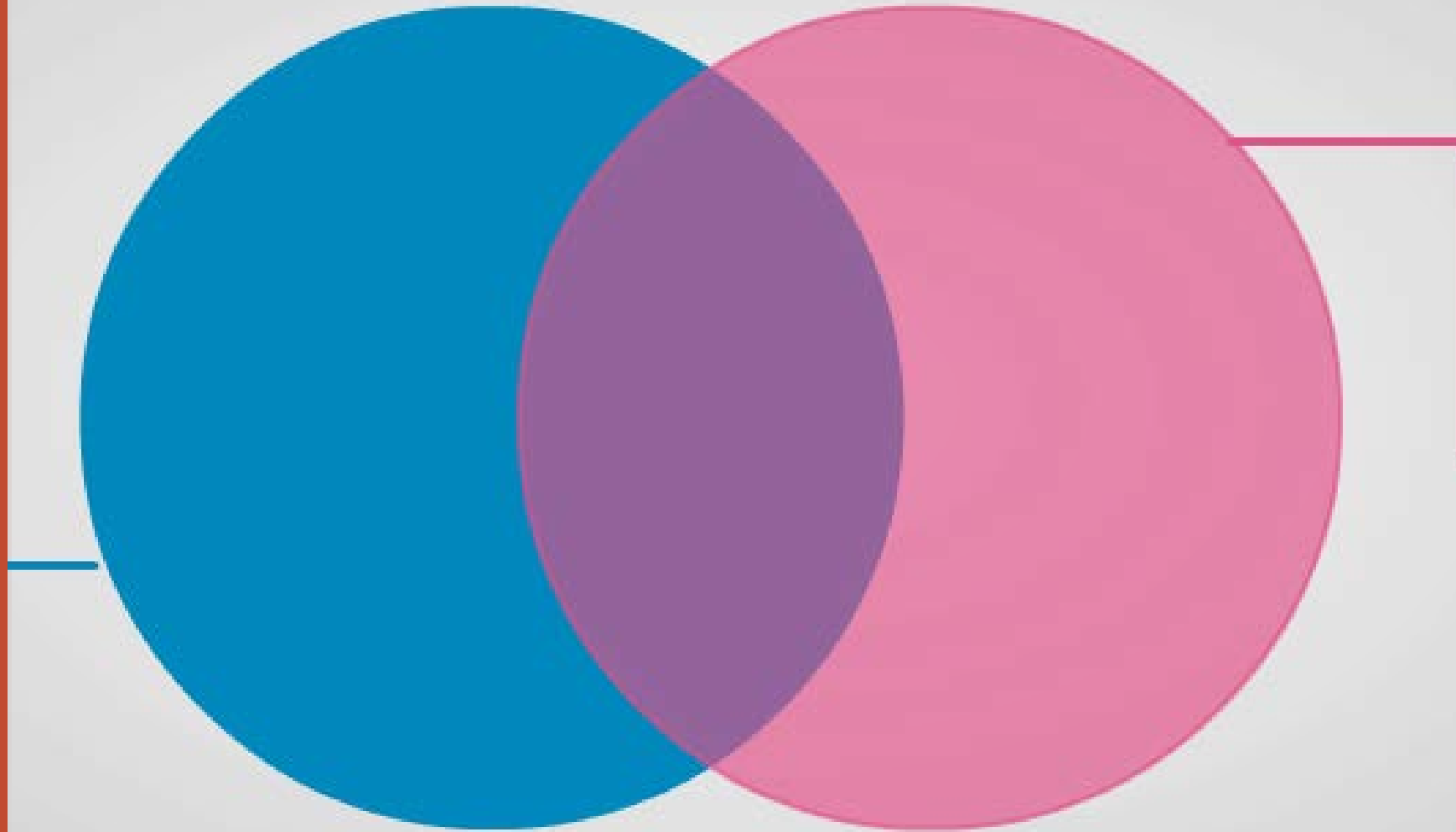
Offers an opportunity
for all employees to
practice critical-thinking
and problem-solving



Teaches
information
design



**Creates cross-training
opportunities**





Reveals flaws
in existing
processes

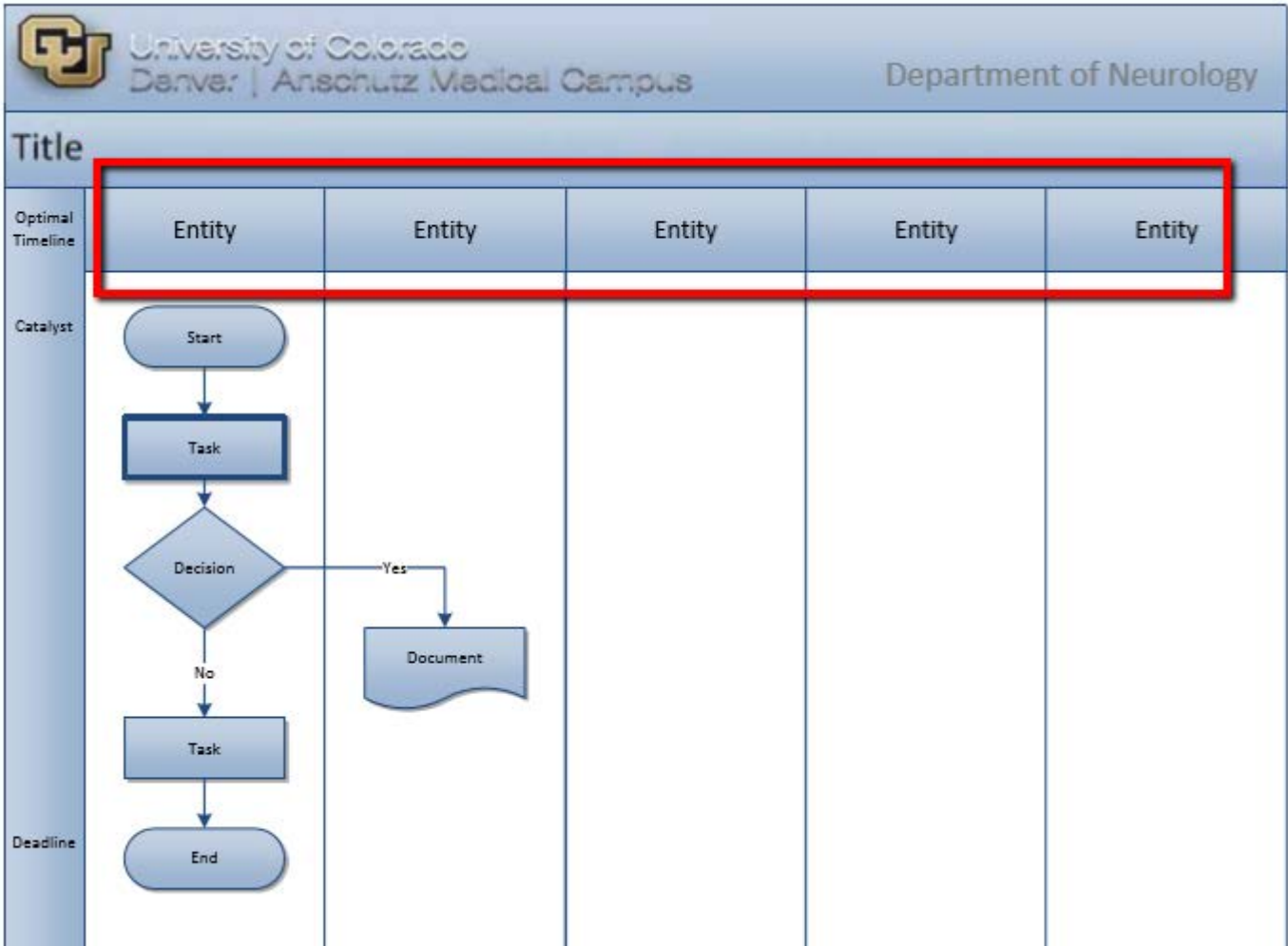


How can you create process maps?

Here's how the Department of Neurology does it:

Group meets
monthly -
everyone
welcome





Map creator
enters
responsible
units across
the top and
the timeline
on the left



Title

Optimal
Timeline

Entity

Entity

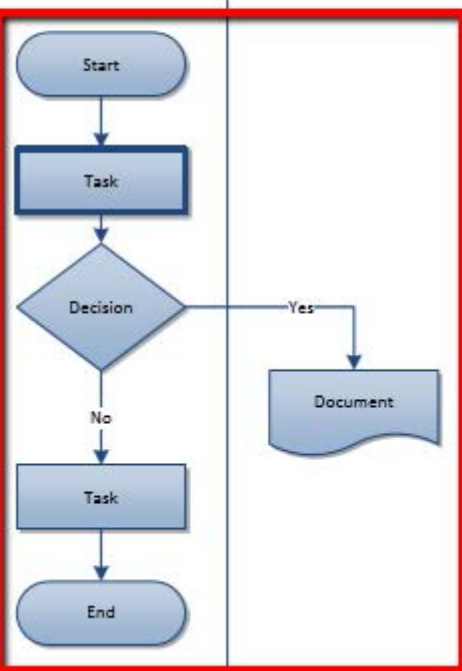
Entity

Entity

Entity

Catalyst

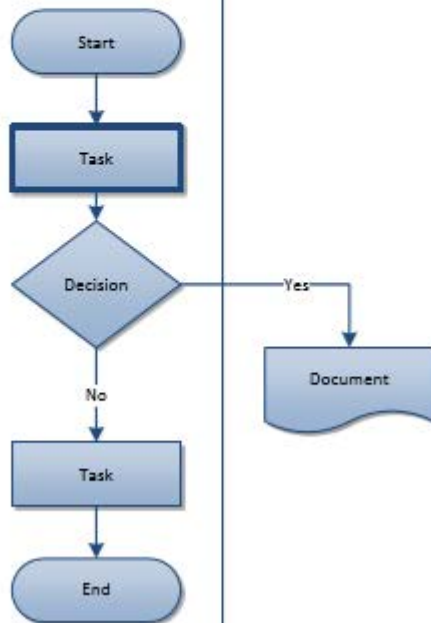
Deadline



Tasks and
decisions are
added in order

Deadline

Entity



**Map is finished
with final timeline
& clarifying arrows
where needed**

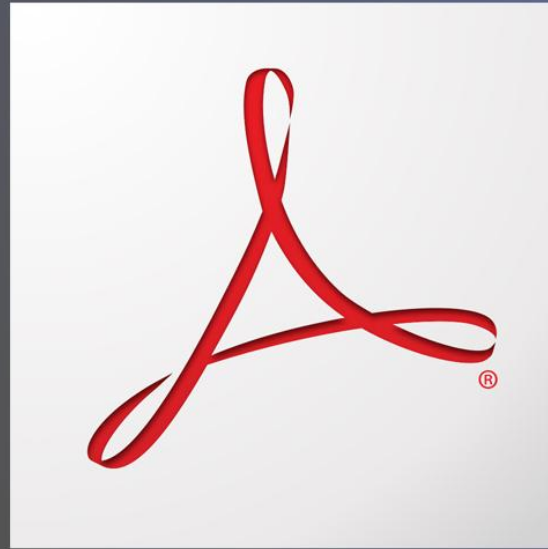
Attendees seek
/ provide
clarification





Host or delegate
then adds
supplemental
documentation/
screenshots/links
to logins

IT team converts
to PDF, adds
hyperlinks, loads
to intranet



Poll Question

Which of the following are essential parts of a process map?

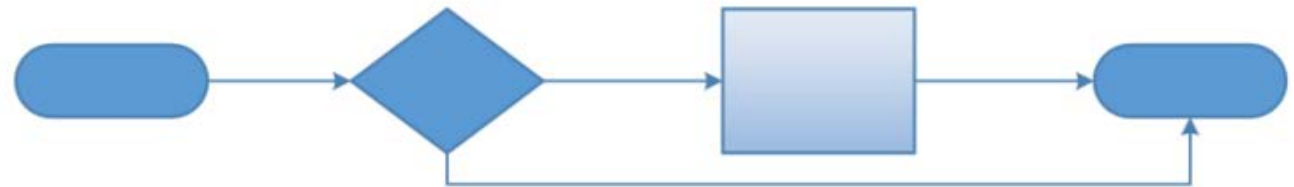
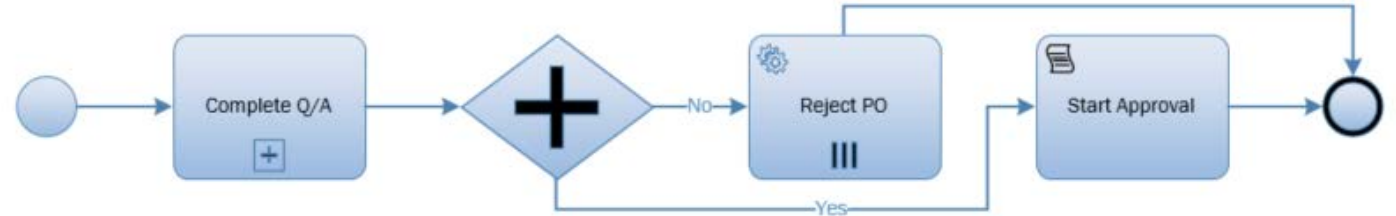


Process Map best practices

Software:

- Microsoft Visio is preferred
- Optional free flow-charting software is available

Even a hand-drawn map is better than none!



WHAT?

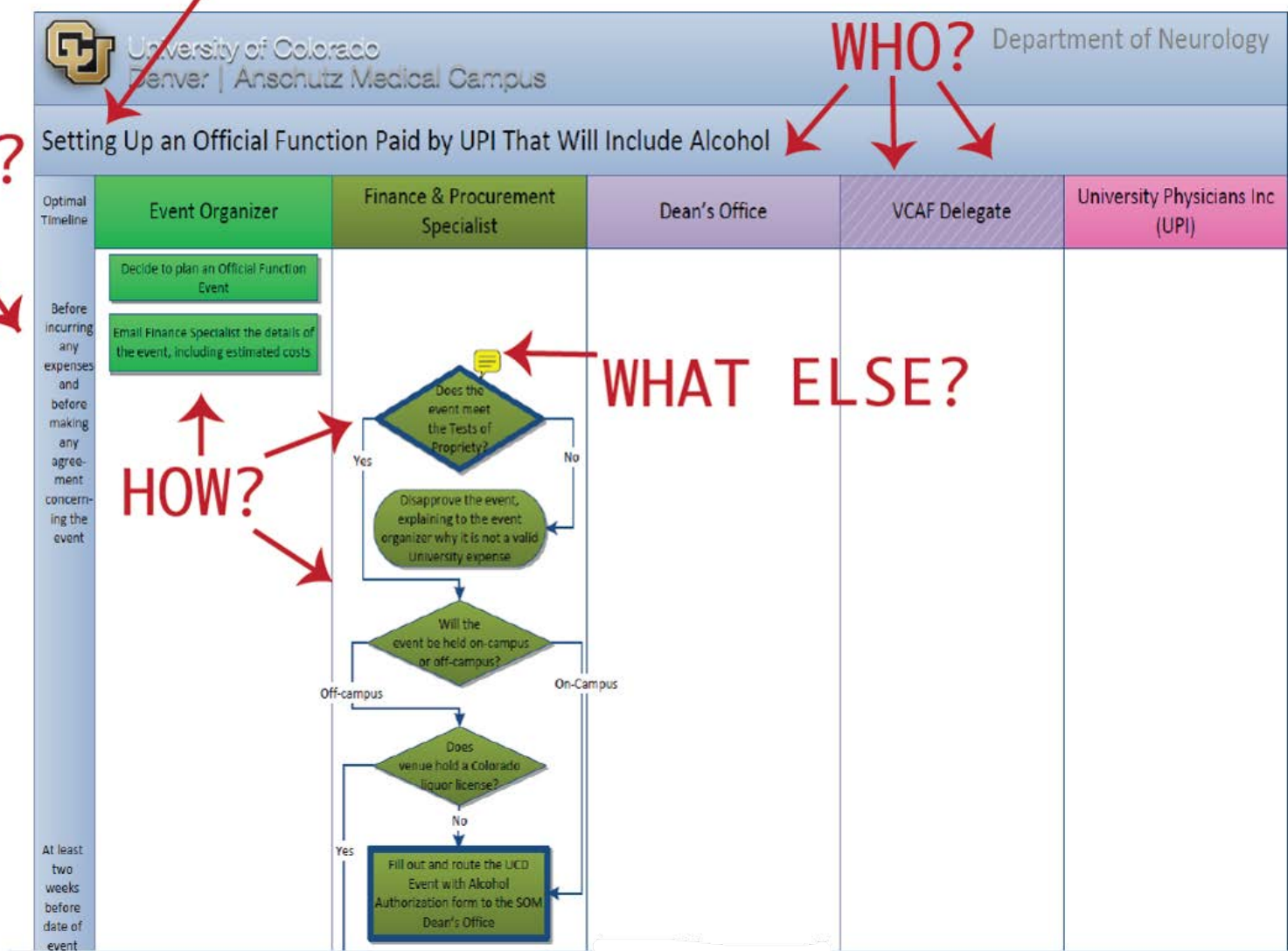
WHO?

WHEN?

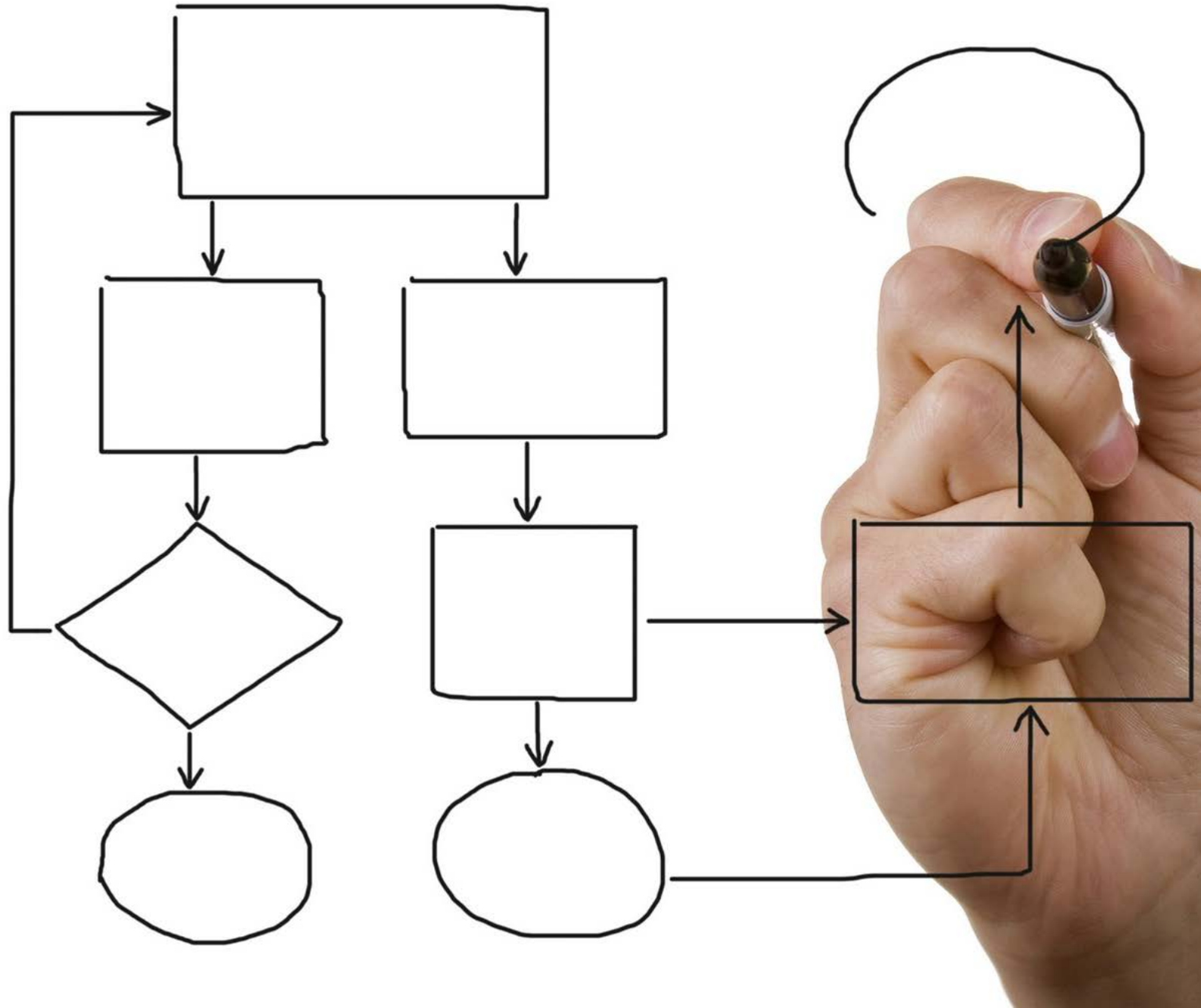
HOW?

WHAT ELSE?

Make sure
timeline (left-most
column) is filled
out and accurate



Sequence tasks
and decisions
vertically down
the page



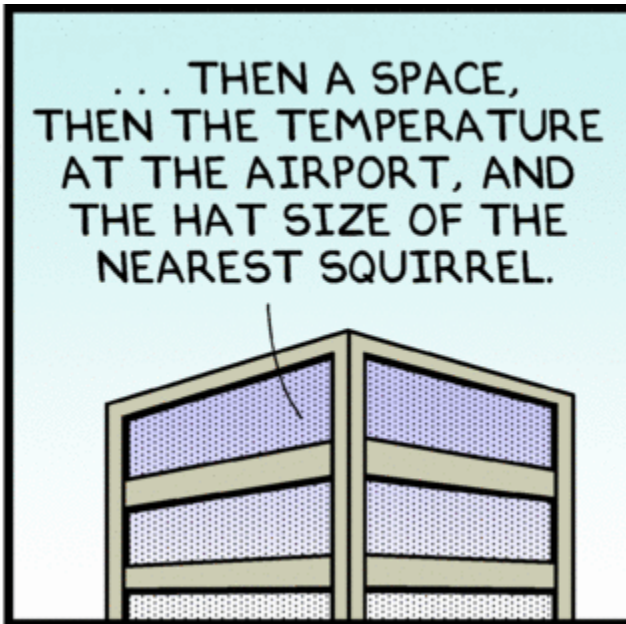
Color Codes and Current Incumbents. Please use these colors and the design title "Office co

Director of Finance & Admin. or Dept Chair	Business Services Program Director	Human Resources	Finance Manager and Procurement Specialist	Operations Manager	Clinical Revenue Program Manager
<p>Current Incumbents:</p> <p>Kathy Illian Ken Tyler, MD</p>	<p>Current Incumbent:</p> <p>Alexander (AJ) Stein Joseph Daniels</p>	<p>Current Incumbent:</p> <p>Polly Serano Josh Schwab</p>	<p>Current Incumbent:</p> <p>Kristie Fields</p>	<p>Current Incumbent:</p> <p>Alina Rich</p>	<p>Current Incumbent:</p> <p>Eric Parker</p>
<p>Color code:</p> <p>Red: 0 Green: 102 Blue: 102</p>	<p>Color code:</p> <p>Red: 179 Green: 67 Blue: 64</p>	<p>Color code:</p> <p>Red: 245 Green: 169 Blue: 188</p>	<p>Color code:</p> <p>Red: 101 Green: 124 Blue: 52</p>	<p>Color code:</p> <p>Red: 105 Green: 198 Blue: 224</p>	<p>Color code:</p> <p>Red: 153 Green: 153 Blue: 255</p>

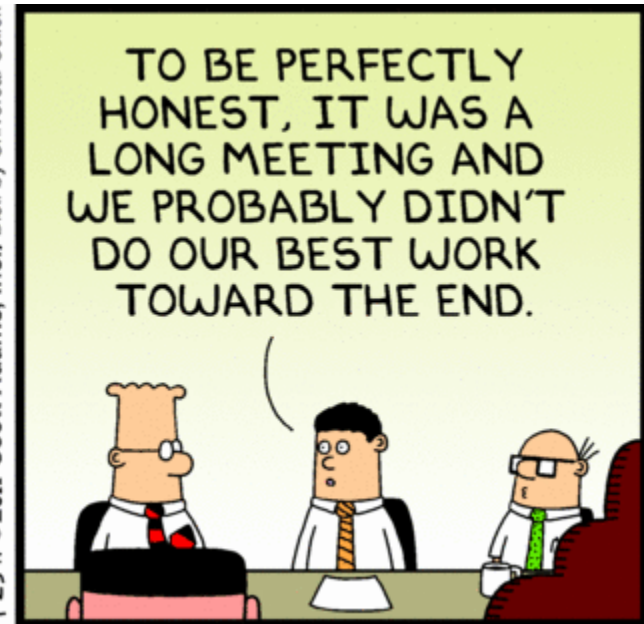
Color-code participant tasks for clarity



Dilbert.com DilbertCartoonist@gmail.com



4-23-11 © 2011 Scott Adams, Inc./Dist. by Universal Uclick



Use standard naming conventions for files
and linked documents



Questions?



Kathy Illian

Kathy.Illian@cuanschutz.edu
303-724-4332

CPAs: To request credit for this webinar, email
CU.CPE@cu.edu

Course slides, handout, and an evaluation form are all available
from the Process Mapping page in the CPE Course Catalog
www.cu.edu/controller/process-mapping-efficiency-and-cross-training