Defining and Diagramming Business Processes

Hosted by Laserfiche

Presented by Elizabeth Cunningham
District Manager - Texas
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Agenda

- Introduction
- Needs Analysis
- Desired Outcome
- Start and End Points
- Activities Performed
- What If
- Order of Activities
- People Involved
- Translate
- Adapt to Change
Introduction

- Business Processes
- Business Process Modeling
- Language and Accuracy
Needs Analysis

• Necessary elements of your business process
  • What do you need your business process to accomplish?
  • What essential tasks must be completed?
• Keep this short and focused
Desired Outcome

• Expand on the Needs Analysis
• Set concrete goals
  • What would you like to accomplish?
  • What is the purpose of your business process?
• Create efficiencies
  • Which other goals do you have?
Start and End Points

• Define your starting point
  • What event(s) start the process?
  • What other objects, information, and/or people are necessary to start the process?

• Define your end point
  • How do you know when the process has finished?
• **Assess how your business process runs currently**
  - What happens at each step in the business process?
  - What information is needed?
  - Who is involved?

• **Ask why**
  - Why is each action performed?

• **Heart of the business process**

<table>
<thead>
<tr>
<th>Person</th>
<th>Action (verb)</th>
<th>How</th>
<th>Object</th>
<th>Other People</th>
<th>Information</th>
<th>Reason</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daniel</td>
<td>Marks</td>
<td>With a stamp</td>
<td>PO</td>
<td></td>
<td>Date and Serial Number</td>
<td>To categorize</td>
</tr>
<tr>
<td>Daniel</td>
<td>Sorts</td>
<td>Into piles</td>
<td>POs</td>
<td></td>
<td>Exception? Priority?</td>
<td>To find exceptions and priority POs</td>
</tr>
<tr>
<td>Daniel</td>
<td>Puts in interoffice mail</td>
<td>By hand</td>
<td>POs</td>
<td>Person to send to</td>
<td></td>
<td>To send to receiving managers</td>
</tr>
</tbody>
</table>
What If…

- Uncover exceptions
  - What if someone fails to meet a deadline or is out of the office?
  - What if someone is missing key information?
  - What if people disagree whether to approve the document or not?
- Map out backup plans

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<td>To categorize</td>
<td>What if Daniel is out of the office? What if he can’t find the serial number? What if he loses the stamp?</td>
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<td>To find exceptions and priority POs</td>
<td>What if Daniel doesn’t know if a PO is a priority or exception? What if he sorts wrong?</td>
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Order of Activities

- Put your activities in order
  - What happens first, second, third, etc.?
  - What steps can occur simultaneously?
  - What happens if some aspect of a step fails?
- Flow chart
People Involved

- List out individuals involved
- Define their role
  - Who plays central role in the process?
  - Who is duplicating work?
  - Who does the workflow bottleneck with?

Elizabeth Cunningham
Translate

• Out with the old, in with the new
• Map it out in Laserfiche Workflow
Adapting to Change

• Revisit and update