



Be a **MODERN MANAGER** with a thriving team.

episode guide

EPISODE 104

Mapping Workflows for Greater Clarity

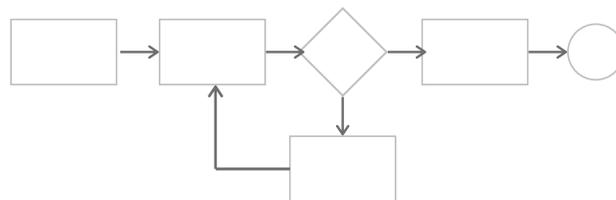
Too often we focus so much on getting the work done that we don't take time to reflect on whether everyone involved has the same understanding of who does what, when, and in what order. Without clarity and alignment on the workflow, teams experience frustration and regularly find they need to re-do work or revisit decisions. Process mapping is a simple way to gain that clarity and alignment.

This guide contains an overview of the elements of process mapping, instructions for how to map a process, an overview of the RAPIDS decision-making matrix and tips for effective mapping.

To view the video tutorial that accompanies this guide, visit bit.ly/MM-Process-Mapping

Process Mapping Basics

Process mapping is an approach to documenting steps, resources, timelines and people involved in a given process. While process mapping can be highly intricate, a basic approach will generally provide sufficient clarity to streamline the activities and reduce frictions.



To learn more about process mapping visit www.lucidchart.com/pages/process-mapping

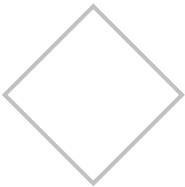


Elements

Use the following shapes to signify their content:



Rectangle: An action or step to be completed.
Include who will do this and by when / on what timeline.



Diamond: A yes/no question or decision-point.
Yes moves to the step to the right. No moves to the step downward. Consider including who will be involved in the decision and what role they will play.



Double Rectangle: Tools, resources, templates, and supplies required.
Include anything that the person completing the action will need.



Circle: The end of the process.
Signal when a process is complete or to begin a new process on a different map.

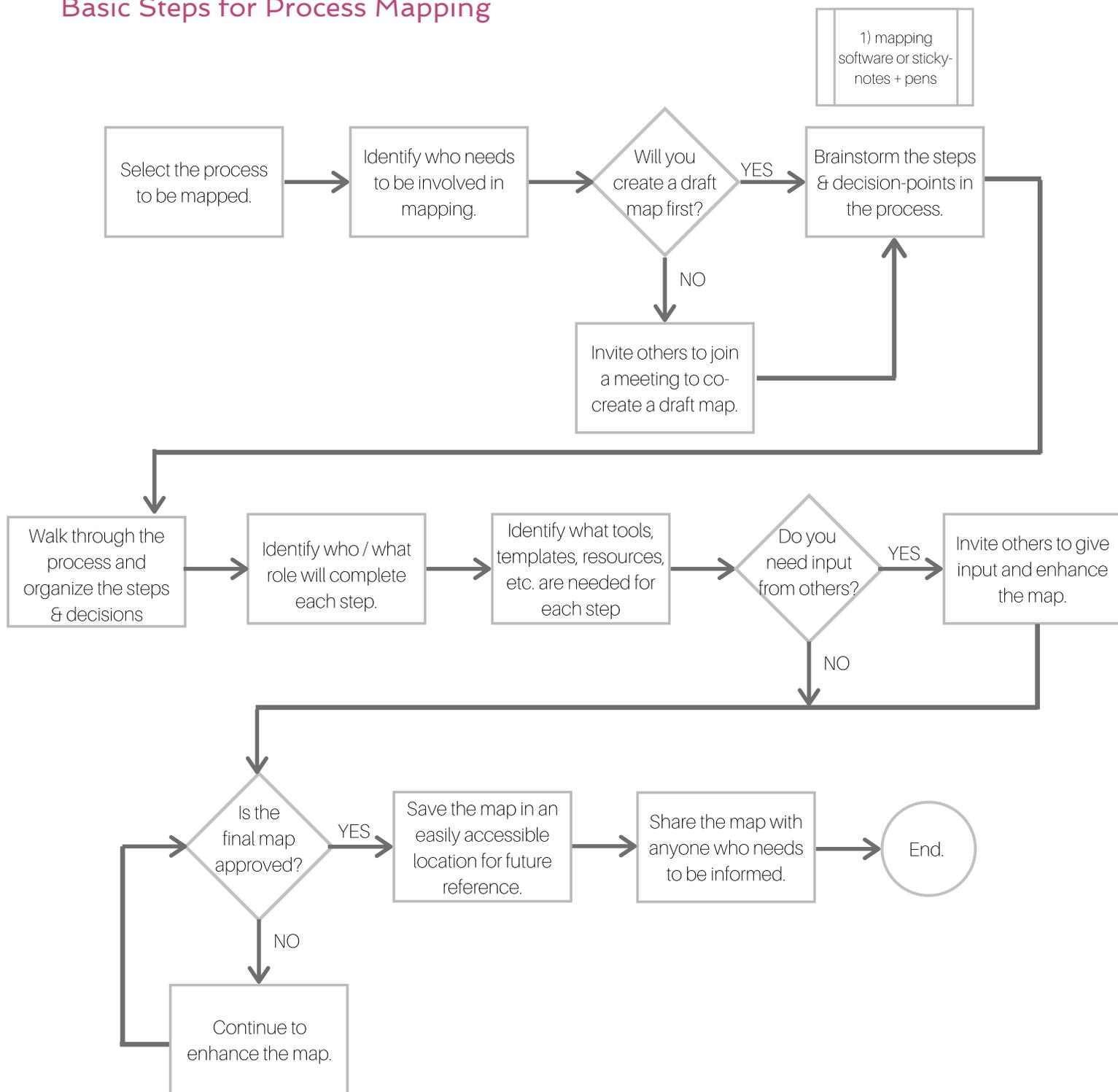


Arrow: Shows directional movement between actions and decisions.
Generally move from left to right throughout the process.

Too many teams overlook the usefulness of a template, tool, guide or checklist. Instead, they treat the process as if it was a one-off every time. It becomes so much simpler when the right tools and resources are available to streamline the work.



Basic Steps for Process Mapping





Tips for Process Mapping

1) Identify what triggers this workflow to begin. Set alerts in your task list, calendar or other system to remind you if needed.

2) Determine the level of detail or specificity needed for each step in order to create clarity but not clutter. Some actions will likely be high level while others will be very particular. Consistency of details is less important than usability.

3) Consider creating templates or checklists, finding a software or tool, or other resources to simplify an action and create consistency for that step.

4) Specify who will take an action using their name/initials or which role will take the action. If an action could be completed by multiple people, clarify how the group will know who should take the step. For example:

- The first person available
- The next person in the rotation
- The software will randomly assign a person

5) Consider how to include the timeline for each action. For example:

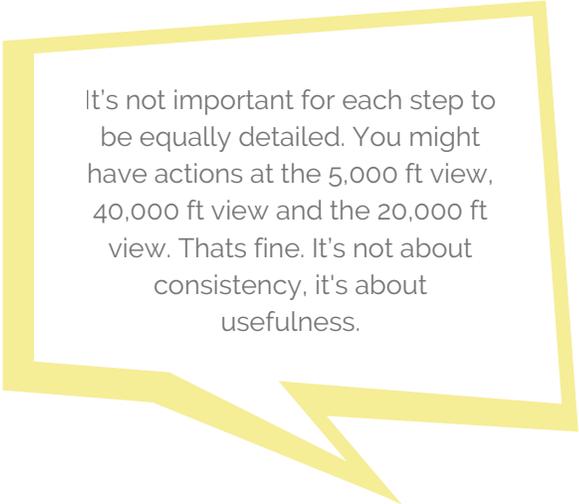
- by the 1st of the month
- within 1 week
- two days prior to...

6) For each decision and step, ask yourself:

- How will I know when to start this step?
- How will I know when this step is complete?
- Do I need to involve others in this step?

7) Revisit the map to update it and address any issues. To do so, plan to review the map after a certain time period (e.g. 1 month), after a certain number of cycles (e.g. 3 completed processes), and/or any time there is an issue or revision to the process (e.g. new decision-point added, lack of clarity around a step.)

8) You don't need to map every process. Start with processes that are not working well or where there is currently confusion or frustration. It's useful to map processes when a new team member will be joining or when an existing team member will be departing. The map becomes a tool for organizational memory, enabling people to quickly get up to speed.



It's not important for each step to be equally detailed. You might have actions at the 5,000 ft view, 40,000 ft view and the 20,000 ft view. That's fine. It's not about consistency, it's about usefulness.



RAPIDS Decision-making Roles

Often the challenge with decision-making is the ambiguity or misunderstanding about who needs to be involved in what ways and at what times. To reduce the confusion, use a RAPIDS model to assign and agree on roles at the start of a project or decision.

R: RECOMMEND

The person or people who will offer options or make a recommendation.

A: AGREE

The people who must agree with a recommendation or decision before it can move forward.

P: PARAMETERS

The person who sets the parameters, criteria or boundaries of what qualifies as an acceptable decision.

I: INPUT

The people whose input must be included and considered because they have relevant or important information and perspectives.

D: DECIDE

The person or people who actually make the decision and own the outcome.

S: SHARE

The people who the decision needs to be shared with after it's been made because it somehow impacts them and their work.

RAPIDS MATRIX

1. In a basic table, list all the key decisions for the process in the left-hand column.
2. Across the top row, list the 6 roles in RAPIDS.
3. For each decision, add the name or initials of the person(s) who belongs in each role.

	Recommend	Agree	Parameters	Input	Decide	Share
Decision 1	MKS					
Decision 2		MKS	MKS			
Decision 3					MKS	