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Daniel J. Power, Editor

Process Mapping and Management

Sue Conger



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*To my daughter, Katie, and my students and colleagues
Diane de La Fon and Brett J. L. Landry, who worked
with me during the development of this book*

Abstract

As the economy moves toward a services orientation, companies are struggling with how to improve their offerings. Process management is a key component of the services that companies provide. This book has three main parts: mapping, improvement, and error-proofing and metrics. In the first part—mapping—the reader will learn how to map a process so that the map is immediately understandable for identifying the roles, work steps, and automation support used in process delivery. The second part—improvement—provides a series of techniques for defining, prioritizing, and analyzing problems from several perspectives. The first perspective is called “leaning,” and its purpose is to remove waste from an existing process. The second perspective is “cleaning,” during which the remaining steps following leaning are analyzed for possible improvement. The third perspective is “greening,” which explores opportunities and trade-offs for outsourcing, coproduction, and environmental improvements related to the process. The final third of the book—error-proofing and metrics—presents several techniques for ensuring risk mitigation for the new process and for measuring changes that define their impacts, and illustrates a method for proposing changes to executives in a “case for change.” Overall, the book provides a blueprint of how to develop a discipline for process management that applies to any type of work.

Keywords

Process, improvement, statement of work, value-added analysis, root-cause analysis, Six Sigma, quality function deployment, statistical process control, failure-proofing, metrics, case for change

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PART I

Opening Gambit

The opening gambit includes activities and skills that are assumed for any project. If you embark on a process improvement without these, then you jeopardize its success from the beginning. Much like a chess game that has risky first moves, these activities are crucial to success but hidden from most client organization staff, and therefore the risks of not having these activities and skills is assumed by the project team.

The first chapter in this part describes activities that should be conducted for all projects in order to situate the project in the context of its organizational environment. The discussion focuses on the duties, roles, and responsibilities of the project team and how to articulate them so that contingencies can be planned as needed.

The next two chapters discuss the mechanics of process mapping. Process maps are icon-based shorthand ways of describing the steps for performing some process. They identify all of the key roles and, to the extent possible, all steps in a process. Chapter 3 describes the icons and how to use them to develop a process map. Chapter 4 discusses common novice errors in process mapping and shows proper techniques for each type of error.

