|  |  |  |  |
| --- | --- | --- | --- |
| **PROCESS NAME:** | < Process Name> | **ORIGINAL DOCUMENT DATE:** | Click here to enter a date. |
| **PROCESS MANAGER:** | <Process Manager> | **LAST REVISION:** | Click here to enter a date. |
| **APPLIES TO:** | <Department(s)—Example: IS> | **ATTACHMENT(S):** | <N/A> |

## About this Template

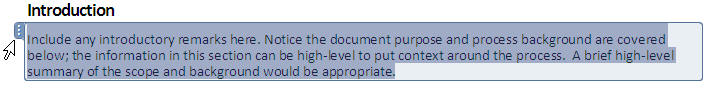
## NOTE: This text box provides information and instructions for using this template. Do not include it in your final document. Please review and delete it. To delete it, click on any border and press DELETE.

This Process Summary is associated with the *Implement* phase of the [**ITS Process Improvement Methodology**](http://www.mais.umich.edu/methodology/process-improvement/)**.** The document captures the scope, use, execution, and continual review of a process. Use this template to create your own process summary.

You can edit any text box that turns gray when you hover your pointer over it:

1. Place your pointer over and shade the text box you want to edit.
2. Review the existing instructional text.
3. Click anywhere in the text box to un-shade it and activate the control tab IPGEditButton.jpg in the upper-left corner.
4. Click the control tab.
5. The text box will darken. Begin typing. Your text will overwrite the text box description.

Example:



If you require assistance regarding this template, please contact [ITS Knowledge Support.](mailto:MA-SSKnowledgeSupportTeam@bf.umich.edu?subject=Requesting%20Assistance%20with%20IPG%20Template)

# Introduction

Make any brief, introductory remarks here to put context around the process. A concise, high-level summary of the scope and background is appropriate.

Notice the document purpose and process background are covered in separate sections below.

# Document Scope

Describe what is included. Specify also what is not included. For example:

* This document provides an overview of the <process name>.
* It defines the objectives, recommendations, best practices, policies ….
* It recommends supporting tools and recommendations for ….
* Use it along with the …. to guide you through the steps of .…
* It identifies the scope of support and related guidelines and best practices.
* Except as where specifically noted, <specify constraints> is outside the scope of this document

# 

# Process Overview

Provide an overview of the process. The sections below are suggestions. Add or Delete sections as needed.

## Historical Overviews

Briefly put the process into context. Describe why and how the process was developed and implemented.

## Process Objectives

Describe the purpose for using the process.

## Benefits

Explain why using the process benefits ITS and process users.

## Maturity Assessment

Provide an assessment rating of process maturity per Gartner’s rating scale. Describe rationale for the rating and an overview of improvement steps if necessary.

## Users

Identify who should use or perform this process.

## When to Use this Process

Explain when it is appropriate or required to use this process.

## Roles and Responsibilities

Define the roles associated with the process, and describe their corresponding responsibilities. Process roles may include:

* Process Owner
* Process Manager
* Process Coordinator
* Process Performers
* Process Advisory Team
* Support Group Manager
* Support Group

## Process-to-Services Mapping

Indicate ITS services this process maps to and supports.

**NOTE**: Please complete this section to assist with ITS process inventory efforts.

## Impacts to Other Processes

Describe relationships to known processes that significantly impact or are impacted by this process.

**NOTE**: Please complete this section to assist with ITS process inventory efforts.

# Terms and Definitions

Define the common terms and definitions used in this process.

# Process Activities

Describe the high-level flow of activities associated with this process. Provide links to process flows or other descriptive documentation. Although task-level instructions such as step-by-step procedures may be referenced, the specific instructions must be covered in standard performance support documents or training as appropriate.

# Best Practices

Describe recommended best practices for approaching and using this process.

# Tools to Use

List any applications or tools required to perform the process. Indicate where they can be found, as well as where any related documentation is located. Provide any helpful links.

# Communication

State communication and documentation needs and expectations.

# Training

Specify if there is any required training related to using or performing the process. Advise the user on how to obtain the training. Provide links.

# Recommendations

Make any suggestions or provide useful advice on using and performing the process. Organize recommendations by category, such as tool, process, and learning.

## Critical Success Factors

Promote anything that results in the successful completion of the process. Include organizational, communication, and documentation requirements.

## Implications

Identify any noteworthy side issues associated with using or not using the process the user should keep in mind.

# Metrics and Process Verification

## Process Verification Plan

Describe the action plan for continual process review. Indicate how often the reviews will be conducted for purposes of addressing findings and presenting a plan of action to process stakeholder.

## Measurements

Describe what measurements (financial, operational, customer priorities) are or are not falling within established, acceptable ranges. Also discuss any non-quantifiable, soft measure reactions such as anecdotal feedback, verbal comments, perceptions, praise or complaints, and concerns expressed. Briefly describe critical success factors and key performance indicators.

## Process Use Requirements

Specify if there are any compliance violations happening around the process. Indicate whether employees are following recommended best practices and if they are completing required tasks as instructed and to expected standards.

# Automation and Supporting Tools

List the tools and automation that support the process.

# Process Change Control

Specify how changes to the process must be requested. Indicate who must approve any changes.

# Contacts

Identify and provide contact information for staff, *including the process manager*, who are key points of contact throughout the process. If there are contacts that can further assist the user in understanding and performing the process, provide those as well. Include contact information for the process management.

# References

Provide any related, additional internal or external reference information, written materials, on-line resources, and so on that can support the process user. Include the name and description for each document included here.

# Approvals

Obtain required sign-offs for this document version. Delete or add signature lines as needed.

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Role | Signature | Date |
|  | Process Manager |  |  |
|  |  |  |  |
|  |  |  |  |