

Understanding Your Business Process: 6 Steps to Creating a Process Map

Every team in an organization has processes that run the way they work. Having a good understanding of your team's business processes can help you to improve productivity and save time and money.

Whether you are managing projects, people, tasks, materials, budgets, or other key elements in your business, you can gain better visibility into your process by creating a visual map of your workflow. A process map, or a data flow map, will help you pinpoint areas that are streamlined and areas that are inefficient. This guide will walk you through six steps to mapping your unique process.

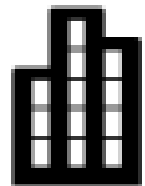
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I. Define the Process that is Giving You Trouble

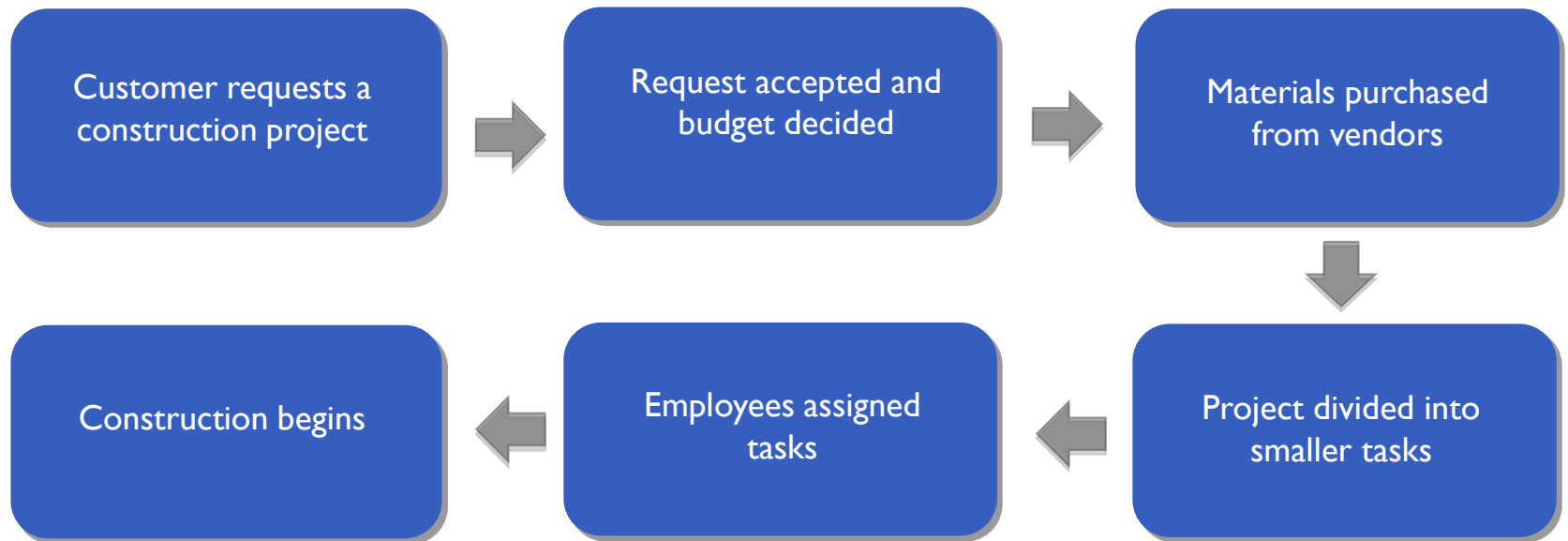
The most important part of organizing your business process is knowing what you are trying to accomplish with your various work steps and why. What do you need the process for? How does it drive your team and your business? What are its end goals? How are you currently structuring that process and is it working effectively? Without a clear grasp on the big picture of your team's process, it will be impossible to structure your process efficiently.

For example, if you're a project manager for a construction company, your process for managing construction projects is critical to your business. Its goals are to bring in money to the business and build a respectable brand. The way you're currently managing the process is starting to cause problems for the business because important data is falling through the cracks and increasing costs. Gaining a better understanding of where these problems are in your process will help you to repair them.



2. Outline the Steps in Your Business Process

Take a look at your business process end-to-end. What are the steps you take along the way and who is involved at each stage? As a project manager for a construction company, your process may look something like this:



3. Identify What You Need to Track

Once you've thought about the basic stages of your process, you'll be able to pick out the most important pieces. Try thinking about this information at its highest level. A good way to identify those pieces is to think about the “who's” and “what's” of your process.

In this example as a project manager of a construction company, your “who's” are Customers, Vendors, and Employees. Your “what's” are Projects, Budgets, Materials, and Tasks. These high-level pieces of information are the building blocks for the rest of your process.



4. Determine What Data You Need to See

Now that you've picked out the important components of your process, start thinking about the details you need to track for each of those components. You should also ask yourself how you currently access this data. Where is it housed? Is it in multiple different systems?

You may want to know more details about each of the tasks in your construction project. For example, you might want to know the task name, the start and end dates, its status, and who it is assigned to. The details about each of your tasks are recorded in multiple places. Maybe your onsite manager keeps a spreadsheet record of all these details, which he emails over to you and you then import into a project management software.

Task name: Lay foundation

Start Date: August 1, 2013

End Date: August 9, 2013

Status: Not started

Assigned to: Bob Smith

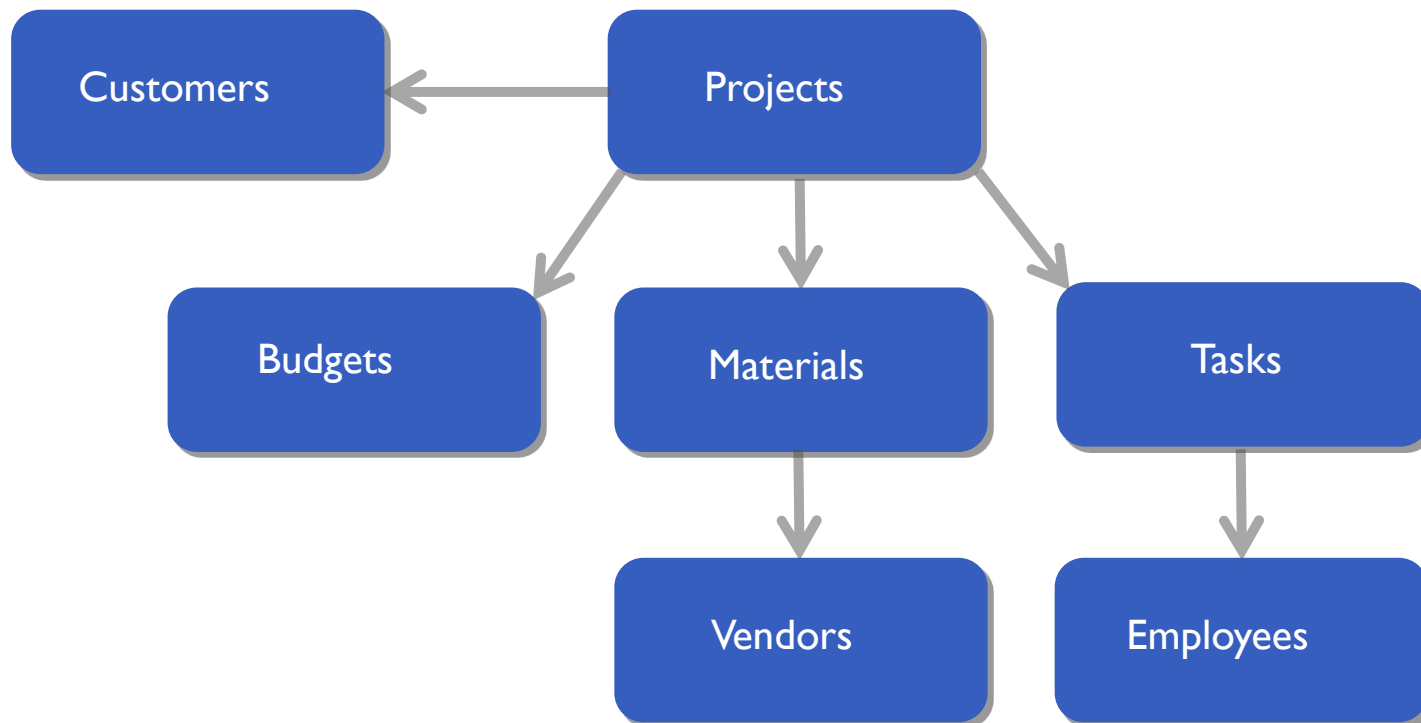
5. Draw Your Process Workflow

Now you can start thinking about how all of your project components and data interact with each other. The easiest way to look at these interactions is by drawing a process workflow. Take your high level information (projects, tasks, and other details) and draw them out as boxes, then draw arrows between these boxes to show how they interact.

One construction project can have many tasks, so draw arrows from projects to task to show this interaction. Each task can have an employee assigned to it, so draw an arrow between those boxes to demonstrate that interaction. As you keep linking your process components together, you'll start to develop a visual map of how your process works. When you're done adding arrows, your process map is complete.

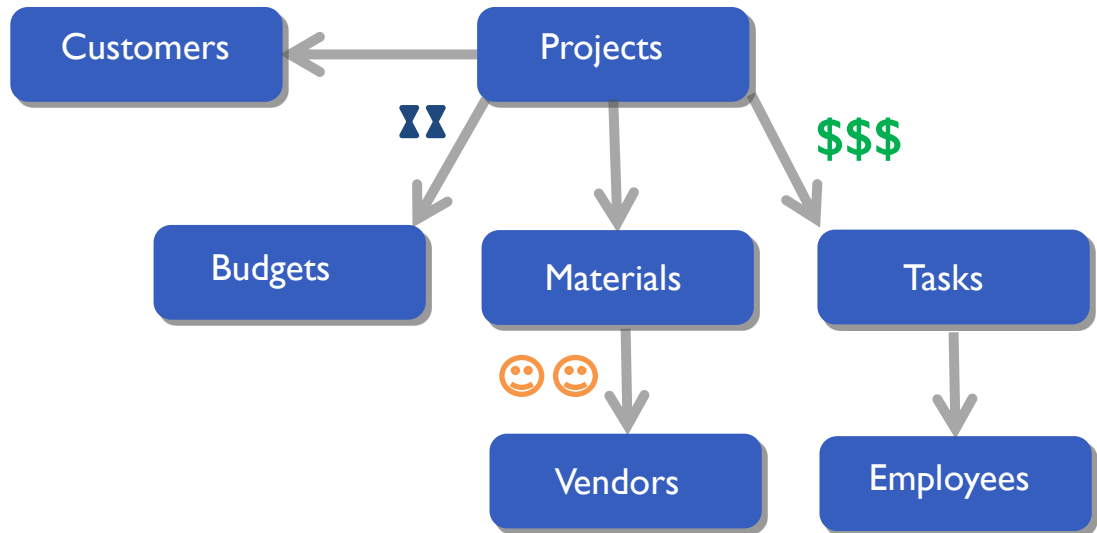
Draw Your Process Workflow, continued

This is an example of a completed process map for a construction project.



6. Identify Opportunity Areas

One of the most important reasons for mapping your process is to give you visibility into what's working well and areas where you could be more efficient and effective. Some common things to look for are repeated tasks, dependencies, data entry into multiple systems, and high cost efforts such as overspending on labor.



Look at your own workflow and see if there are any other common areas that you may be able to streamline. A good way to visualize these areas is to draw them right on your process map. For example, does it take a long time for a project's budget to be approved? Does it cost more than it should to complete simple tasks? Do you require more people than necessary to interact with vendors?

Solve Process Challenges. Start a Free QuickBase Trial.

Having a good understanding of your business process is the first step to improving productivity. Many organizations are spending 10-75 hours per week and \$50,000-\$200,000 on unnecessary steps in their processes. Now that you have a visual map of your process, you can take the next steps to improve it. Intuit QuickBase is one solution that can help you streamline your unique process and improve productivity. Start a free 30-day QuickBase trial to solve your process challenges.



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