

## THE BUSINESS CASE for PROCESS MAPPING

(Adapted from an internal paper developed by a major US engineering group before they bought PROMANADE **ADVANCED** to define their global operations)

### WHAT IS “BUSINESS PROCESS MAPPING”?

Business process mapping is the first essential stage before process management and improvement. It can represent a major change in mindset for organisations which are focussed on procedures (especially within departments) but recognising and defining processes will enable an organisation to manage its operations much more effectively.

There are various styles of process mapping and flowcharting, and various software packages to support them. The deployment (matrix) style of flowchart is very well established in the oil and gas industry, and when combined with the RACI approach it can simplify and clarify operations to great benefit.

Using software such as Visio or Excel to draw such flowcharts can be useful for individual processes, but this approach has a number of weaknesses for managing an integrated system in relation to the effort involved, the consistency of presentation and the opportunity to analyse process definitions in different ways.

A definition of a business process is "a set of related tasks that is triggered by an event and which is intended to achieve a business objective. It uses resources and is subject to influences". The best way to show (or "map") a process is widely accepted to be as a flowchart. A process flowchart (or "map") shows "what has to be done", and a deployment flowchart also shows the job functions involved i.e. "who should do it". The deployment flowchart is a matrix, often presented with job functions along the x-axis and tasks or activities down the y-axis.

### WHY AND HOW WILL ADOPTION OF PROCESS MAPPING BENEFIT / IMPROVE A BUSINESS?

Process mapping is a tool that an organisation can use to improve performance by managing its business processes more effectively and efficiently. An organisation will only benefit if it uses the tool well. Some of the benefits that an organisation can gain include being able to:

- focus on process understanding and management rather than (just) compliance
- highlight performance standards and business risks against tasks within a process
- make processes easy to define and simple to understand by using a standard presentation format
- structure your processes into a logical management system by using a simple index framework
- give online access your system by using the easy-to-generate HTML presentation
- agree the basis for identifying potential improvements
- set up hyperlinks to referenced sub-processes and documents automatically
- do away with volumes of narrative
- create Job Descriptions automatically from process definitions
- show how and where documents and other information are used within processes in Document Usage reports generated routinely by the software
- demonstrate how the requirements of ISO9001, ISO14001, Sarbanes-Oxley, EFQM and other external standards are being met.

Process mapping is also an essential tool in managing mergers and acquisitions (when different work practices can cause ongoing difficulties) and in establishing and communicating clear standards for operations in different business units and geographical areas.

### IF YOU ADOPT BUSINESS PROCESS MAPPING, WHAT WILL CHANGE FROM WHAT YOU DO NOW?

An organisation may need to integrate and rationalise management systems of recently acquired companies, or of a reorganised group, to create an effective way to manage the whole company – or it may “just” need to find ways to improve performance. Process mapping is the ideal tool for this task because it is designed to help to:

- define the current situation to give a baseline for change
- set out clear recommendations for change and improvement
- specify performance standards and business risks
- define resource requirements (including skills and knowledge).

Once the new business management system (the BMS) has been developed, process mapping will aid implementation because:

- its standard presentation format gives unique clarity
- its easy-to-generate HTML presentation gives world-wide system access online
- it does away with volumes of narrative
- its hyperlinks to referenced sub-processes and documents (e.g. procedures, forms, web pages) allow all relevant documents describing the organisation's management systems to be organised into one structure with the flexibility to accommodate local practices (e.g. using the same map throughout each Business Unit but hyperlinking different documents for different locations / projects).

### **WHERE AND HOW WILL PROCESS MAPS BE PUBLISHED?**

Process maps can be published on each Business Unit's Intranet. An organisation can customise index pages to match the corporate style, creating its own "look and feel". Existing (or new) Management System documents will be hyperlinked to the relevant process maps.

### **WILL PROCESS MAPS REPLACE PROCEDURES?**

No. Procedures, Technical Guides and Standard Forms will be hyperlinked to the relevant process map(s) (as will corporate Standards etc).

### **HOW MUCH WILL THE PROCESS MAPS COST TO DEVELOP AND MAINTAIN?**

Software costs will depend on the number of registered users who can define and manage process descriptions – once the electronic system is published as a set of HTML files, all users with access to the Intranet / network can view the process descriptions, access the document register and review a detailed job description for their role created automatically from the process descriptions.

Typically, a small number of users would have the software. The system is particularly suited to managing more than one management system, where selected processes can be exported and imported from one system to another. The "language" capability also enables the local language to be specified for all field names and system messages.

Training workshops are likely to be required to ensure that you make best use of the software from day one. Further assistance is available if required to review progress or to provide more detailed resource for process definitions if necessary.

Initially, process maps will illustrate processes that already exist so their development will not need original thinking and therefore need not consume many resources. Subsequent improvements must be justified individually.

Because the data for all process maps in a single management system are held in one dataset, maintenance costs will be minimal. Any aspect of the BMS (e.g. job functions, documents, resources and influences) need only be changed once to be cascaded throughout the system. One Technical Assistant will be able to handle maintenance of an entire system in addition to their other duties.

### **WHO WILL BE INVOLVED IN DEVELOPING THE PROCESS MAPS?**

Specific example (major US engineering group): The entire Leadership Team, facilitated by the Quality Group, will agree the few (6 to 10) high level Business Process Maps that form the backbone of the Business Management System. The Leadership Team will assign Process Owners to expand key aspects into more detailed maps. Process Owners will agree detailed maps with the Quality Group (to ensure the integrity of the overall BMS). The Quality Group will hyperlink approved maps into the Business Management System.