LPIHQ:
PROCESS MAPPING FRAMEWORK PART 1

BEFORE BUILDING OUT A PROCESS MAP

Before building a process map, you should complete a series of necessary steps and requirements. Engage with the stakeholders, take them on that journey, and ultimately construct the end solution. Find out who your stakeholders are and what outcomes they seek. Over time, you will gain the experience and confidence to interact with different levels of stakeholders. Moreover, your work will begin to speak for itself, which will, in turn, break down those barriers.

UNDERSTANDING PAIN POINTS

When planning out a process map, be sure to have a timeline and end goal. If you fail to meet the deliverables, stakeholders may doubt the journey they've started. Demonstrating your capabilities and being responsive to your stakeholders' needs is essential. Understand what their pain points are and also understand what key outcomes they want.

Prioritize significant pain points and see if you can first solve some critical ones in a shorter time frame. Quick wins will help gain stakeholders' confidence and may also increase confidence for completing the rest of the project. Understanding key needs can help the overall flow of process mapping.

IDENTIFY THE BOTTLENECK

Understanding the reporting and MI requirements is also essential. For instance, you may want to understand your lawyers' and intake teams' caseload and if there are bottlenecks within your process. In other words, when handing off assignments to specific team members that are taking longer than expected, you would want to determine if there's a bottleneck (such as an inadvertent hand-off to someone who already has too many cases).

Even if you build a process capable of significant improvements but haven't been able to define the outcomes nor understand the metrics for success, you will struggle to give value to the process. Therefore, reporting can be the essential final piece for success.

Budgeting
The role of budgeting may differ in various organisations. In some cases, there is a dedicated team, or other case, it may be the responsibility of the sales team.

ONBOARDING CLIENTS

With the understanding of pain points and outcomes, you can now take a closer look into the finer details. Depending on the project's scope, on-boarding can range from a day to week. You can interview clients who share their understanding of their process and get to the heart of the problems for which they seek an improvement to the current state. With these problems defined, you can then begin mapping out the process.

Once you have the blueprint of what you'll deliver to the client, you can begin the next step, writing a statement of your work, akin to scoping the implementation. This SOW is where the accurate details come into play. Of paramount importance is documenting everything you do for the client along the way to deliver a good process.

FINDING TECHNOLOGY THAT WORKS FOR YOU VS BUILDING PROCESS WITH THE TECH IN MIND

There are two ways to process map when considering technology in your process improvement effort. You have a process map ready to go and then find the needed technology. Or, you may have found a technology (or have been provided one) for which you build your process map with that technology in mind. For example, we at Autologyx have a thorough understanding of our platform and what it can do for your process, so we know what to do to make it work for you.

When stakeholders have a process they understand thoroughly, it can still be challenging to think about improving the process using technology. This challenges us to think outside the box and ask, "How can technology take us there?"

GETTING INTO THE DETAILS

Now that we have the project scope, who's on the team, and what high-level workflows and analysis will look like, the transformation ensues, and we start designing the process into Autologyx. This part can get quite detailed; you have different workflow settings, followed by branding, styling, and much more. Essentially, implementation takes into account every aspect of the process.

Thus, it's important, to begin with process mapping to gather detailed information. It is critical to be as comprehensive as possible. Unfortunately, at times, even with starting with information gathering, we may still miss important details. It shows how time-consuming and challenging it can be to get that ingrained day-to-day process from individual brains into a documented workflow. Moreover, suppose we haven't understood the requirements properly. In that case, it may result in a higher workload, having to redo things and engage with different teams all over again, especially in situations where there are multiple internal and external teams.

This implementation process could take around two to four weeks, with complete documentation for the stakeholders to get feedback to build upon.

Workflow Automation is Here to Help, Not Replace
There is a misconception by some that workflow automation is here to replace their job; however, this is not true. Automation is here to lighten workloads and remove manual tasks that grind them down daily, allowing them to excel and be more efficient at the more critical tasks at hand.

COMMUNICATION AND DOCUMENTATION

"How we communicate with our stakeholders with our clients, with our team, how we show progress, how we keep people up to date, take them on the journey...The key again, documentation, making sure we've wrote everything down."

Documentation allows for you to show the client that you have understood their requirements. *"This is how we've understood your requirements. This is what we believe we can do in the technology. Are you happy with this? Please read through and sign... You are sort of covering yourself and also covering the client in terms of that - documentation is key."*

COLLABORATION

When it comes to using tools, it is what you find most comfortable and easy to use because it comes down to telling the story of that client's journey. Anything that can be visualized and allow people to see what is happening is key. For example, Miro is an excellent flexible tool for process mapping. It will enable you to quickly build out process workflows and collaborate with others, whether internal people or outside clients. For instance, we project manage the process understanding in our own development work. After gathering information, we break down steps and components into tickets for the front-end and back-end developers. We also allow clients to collaborate with us by allowing them to add tickets.