

LPIHQ:

# PROCESS MAPPING FRAMEWORK

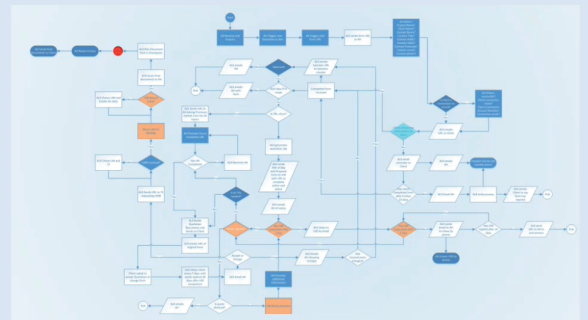
PART 2

## AS-IS PROCESS TO NEW PROCESS

When creating a new process map, you must engage with your clients to find out their current as-is step-by-step process. We can then build a new working process map to implement into the technology from this existing process.

The challenge is that sometimes clients have different interpretations of their process or may not actually know their process as clearly as they have thought. There may be times when other stakeholders have different ways of doing things and may explain their process steps differently. The way to resolve such issues is to ask questions. Keep asking questions and go back and forth until you and your clients agree on the process.

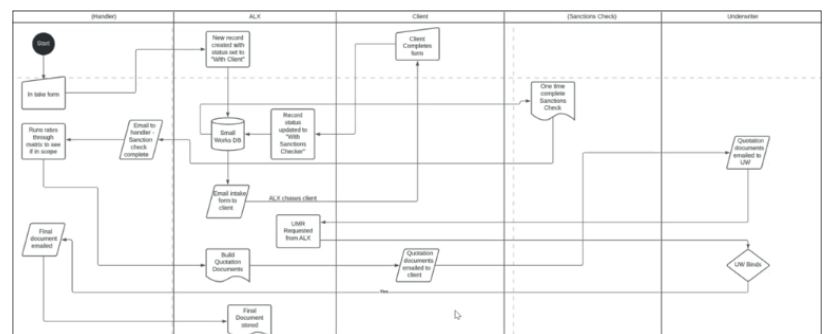
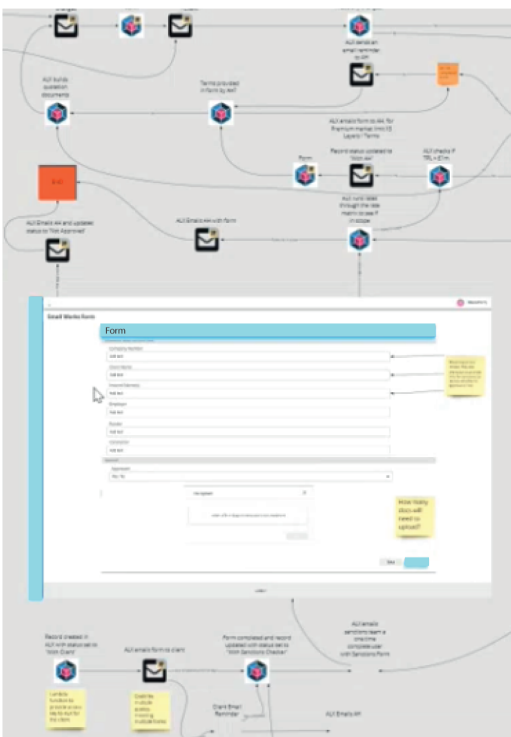
Always have multiple meetings to get the requirements, document your work, and get sign offs. This sign-off is critical in case any discrepancies in the process may arise once team members use the technology. "Are you happy with what we're going to deliver? Sign."



"It's just asking the questions. It's trying to break down the bits that we need to understand, and then relaying that back to them in terms of the technology. To go, 'Okay, so you're sort of saying this to me. We can do this with the technology that would allow you to do that. Is that sort of what you're trying to get to'. And they're like, 'Oh yeah, that. Yeah'. And then again, it's just asking a lot of questions. And I think every client engagement I've done, the client has always said, 'We know our process'. It is not until you start getting into this part of it that you start seeing holes and gaps, and all of a sudden they'll go, 'Oh, and I forgot about this!'"

## TOOLS FOR ENGAGING WITH YOUR STAKEHOLDERS

When creating your process map in Visio or Miro, you must engage your stakeholder at every step. Using these tools lets your stakeholder see the process and provide input directly. They can provide existing workflows, make changes and add things they may miss.



## SWIM LANES

A great way to create a process map is to use swim lanes. Start by creating personas, which can include the technology users, stakeholders, operations (i.e., Autologyx), and others. Then use swim lanes to map out the whole process, separating the different levels in the process to visualize their experience of the personas at a certain point in the process.

"Some people like swim lanes because they can sort of see OK as the underwriter. I know this is what I need to do. As the client, this is what I need to do. Whereas other people like visuals. They like to see a mock up of what forms are going to look like or what an email's going to look like. And so as part of my process, I try and account for all of those sort of types of people"

## PROCESS MAPS MAY NOT BE FOR EVERYONE

Not everyone you engage will like pictures or maps, and sometimes they want a more verbal or written run-through of the process.

"If you take a term sheet, you may have different data points, you may need to capture at one stage and then transferring all that into second stage may change different steps in different you know further down the line. And the outcome you may want is a contract or a document assembly of some kind pushing out something out. May mean that you have to, you know, pull data from different sides. So how do you represent that on the map? Can get complex... different levels. And how do you pull that all together...? Because not everyone likes pictures or maps... Some people love it. Some people just don't like it."

## WHAT MAKES PROCESS MAPPING GREAT

"...Engaging with the stakeholders, gathering requirements, understanding pain points and the desired outcomes. Taking the clients on the journey, doing the documentation, and the workflow. The process map ultimately for me in my role comes down to what we deliver within the technology... How to implement change within that client system, that is, now sending out emails, connecting systems, and doing data transformation. This is absolutely the end product for me... I enjoy being able to do everything end to end, which allows me to know the detail. So when I do get into the implementation side, I know that I can make changes on the fly since I already know what I need to do to get the desired outcomes."