

Process Mapping For Various Purposes

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FOR KNOWLEDGE MANAGEMENT

Process Mapping that illustrates an end-to-end process for knowledge sharing, demonstration of mastery, and training purposes

The structure used might be a process map of all of the big phases within a given process

- In each essential phase, provide the ability to dive down into the details
- Add UTC Codes, phase and task codes if available
- Link each task with relevant documents
- Store in a global knowledge bank

Goals of KM Process Mapping

Focused on succession planning

Knowledge Transfer

Delivery of that Knowledge

Benefits of KM Process Mapping

Shows mastery of the process, especially helpful in client pitches (offer the ability to print to pdf)

Helpful to be able to explain to a business person how a legal process works

Serves as a resource for lawyers, especially associates – what comes next?

Can provide training links

FAQs on where to seek help

FOR WORKFLOW AUTOMATION

Mapping the as-is process but probing for areas of improvement

All the while asking questions with an eye towards “how will this be implemented” on a workflow automation platform

Knowing the detailed steps of is that an email alert?

Essential to determine who does what, when and how

Reminder: Assure interview subjects you’re about improving their experience and allow them to concentrate on high-value tasks. Be with the initial awkwardness until you win their trust

FINAL THOUGHTS

“I think there are some days when I might like the idea of having to do a repetitive, boring job, you know? Or I can just do the same thing all day and then not have to think about it any more, because otherwise, it’s all decision fatigue.”

FUTURE STATE

Turn static process map into active assignment of tasks and distribution of sub tasks to and by matter teams

Gauge where the matter stands against how much time and budget has been used

Estimated time to be charged to each phase

Ability to assign cost basis to specific process steps and record against current matter

An ideal scenario is to have all resources and information as to where the team stands at any given moment in the life of a matter

Integration between time recording, phase codes and process map

FOR PROCESS IMPROVEMENT

Use a discovery ideation approach to engage stakeholders in building that process map. Many firms do not have that visualized understanding of what’s actually happening, including both process map and process team.

Identify pain points and roadblocks.

Start to build what “good” looks like.

Then look at the process map, identifying resourcing, technology, or process issues.

- Determining who to involve
- Is it a resource component? Communications? Stakeholder management? Is there a technology component?

From there, we can start to look around for options and recommendations, reporting to implement, and various process improvements.

Run validation sessions and iterate solutions.