

## Mapping processes

Choose the process you will be mapping.

Choose a place to draw out your process map. A whiteboard with markers and sticky notes is easy and allows multiple team members to come in, review, erase, move around, and redraw components. There are also digital versions of these boards for virtual sharing and viewing.

Decide on process mapping software.

Involve the team who execute the process.

Get the team to give a rough sketch of the process. This is the “as is” process. They need to ask:

- What is accomplished in this process?
- How is it accomplished in this process?
- When are the process outcomes achieved?
- Where does this happen?
- Who is involved?

Refine the process. At this point you can either choose to optimize (“to be”), or just complete the process map.

Finalize the process draft.

Create the digital version of the process map.

Re Engage the process execution team. Once you have the final map ready, it is the process execution team who can troubleshoot and report any problems with your final map.

Finalize the whiteboard draft

Create a digital version of the process map

Distribute the digital version to the executing team