



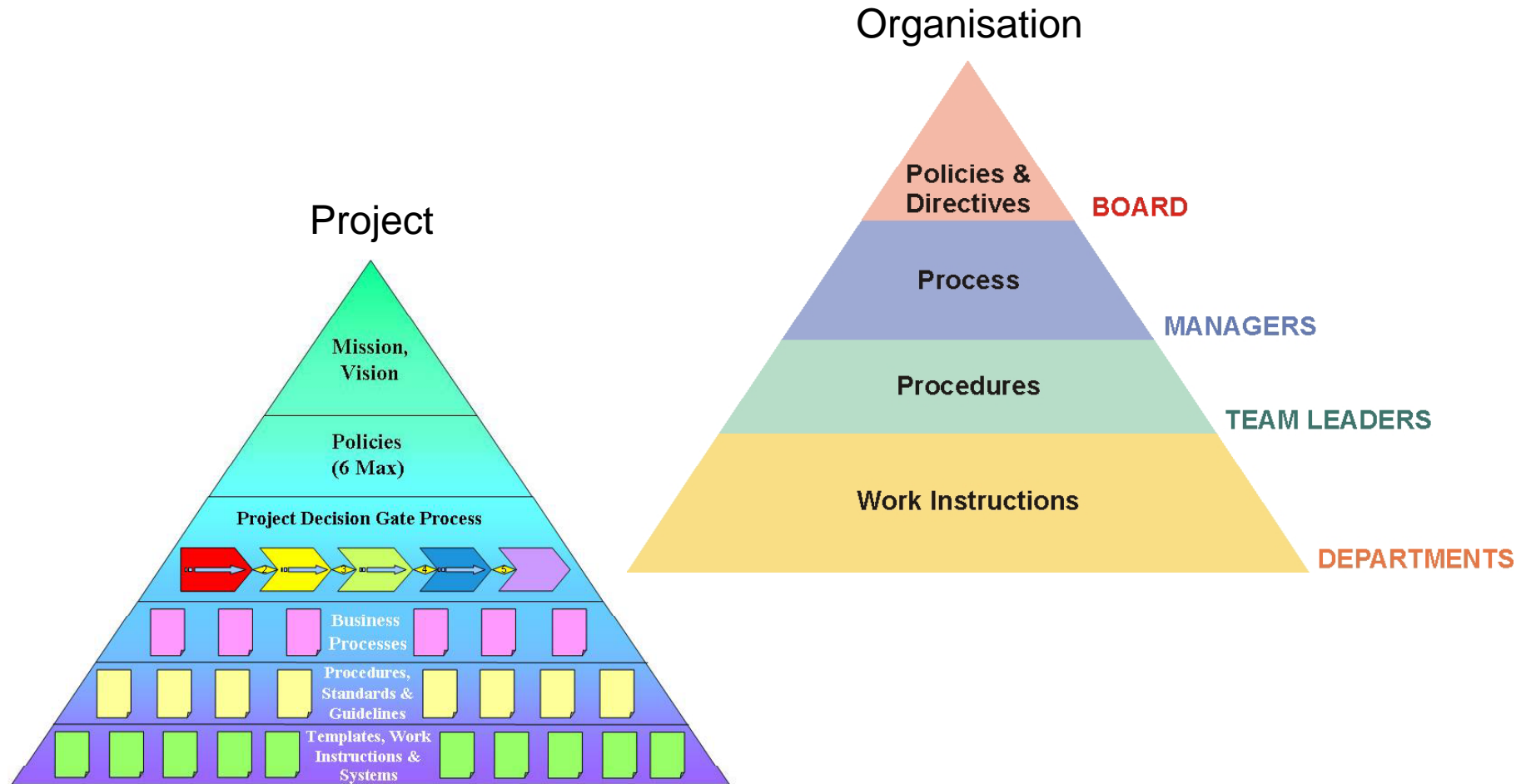
Process Mapping & Procedure Development

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Typical Management Systems – Overview

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Slide 3

What are Policies?

- “A plan or course of action, as of a government, political party, or business, intended to influence and determine decisions, actions, and other matters”
- Policies determine direction and course of action
- Policies’ examples are:
 - Health & Safety,
 - Environment,
 - Quality
 - Governance
 - Business Ethics



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What is a Process?

- “...a series of actions, changes or functions that bring about an end or result.” (*American Heritage*, 1978, 1043).
- “A Process is defined as one or more tasks that transform a set of inputs into a specified set of outputs (goods or services) for another person [customer] or process via a combination of people, procedures, and tools.” (Wesner, Hiatt, Trimble, 1994, 38)
- The sequence of things [procedures] done to produce an output. A task is just one individual step in the process (Flanigann, Scott, 1995, 6)



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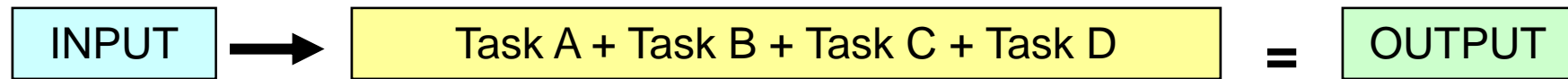
Where do Processes fit in your Project or Business?

- Processes are your core activities
- Processes start from directives or policies developed or mandated by executive management or board
- Are developed by the managers in each of the major policy and operational or project areas
- Should then be implemented via Procedures



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Process - Simplified Presentation



- An input is whatever you need to start the process
- The tasks are the specific work you add to the input
- The output is what you deliver to your customer (can be internal department etc.)
 - Focus first on WHAT needs to be done, then WHO is doing it.



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Why do you have Procedures?

- To comply with corporate policies and directives
- To ensure external compliance requirements are met (corporate law, etc.)
- To ensure consistency, efficiency and repeatability of business operations.
- To provide an audit trail (quality & compliance)



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What is a Procedure?

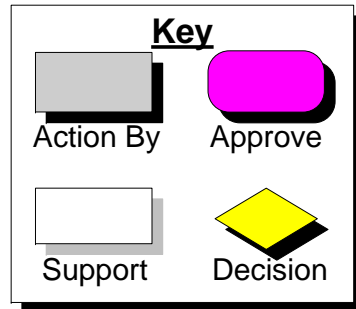
- A controlled* document that describes:
 - the sequence of steps to execute a routine activity. Usually involves several individuals or departments.
 - A complete unit of work that specifies the “What”, “When”, “How” and by “Whom” this unit of work will be done. These are a mandatory when developed.
- [Email us for an example](#)

*Version controlled with standardised distribution



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What does a Procedure identify?



- Tasks that are required for the process, in sequence
- Who is responsible for accomplishing each task
- Who provides support for each of those tasks
- What systems are used
- Decision points
- Approval points



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Who “owns” what?

- **Process Owner:** overall manager of Process (within business unit); person who has the broad knowledge of policies and directives
- **Procedure Custodian:** team leader of business section; person who has the detailed knowledge of the activities



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Creating procedures from a written base

- Review existing Procedure and confirm chronology and start and end points.
- Extract from the written document who is involved
- Map the identified activities against responsible roles in sequence, including decisions and approvals

OUTPUT: hand draft of flowchart.



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Mapping procedures from scratch

- Identify where the procedure starts and ends
- Identify who is involved
- Get all players together
- Walk them through the procedure and extract information (i.e. what they do, who supports them and/or contributes)
- Map the identified activities against responsible roles in sequence, including decisions and approvals

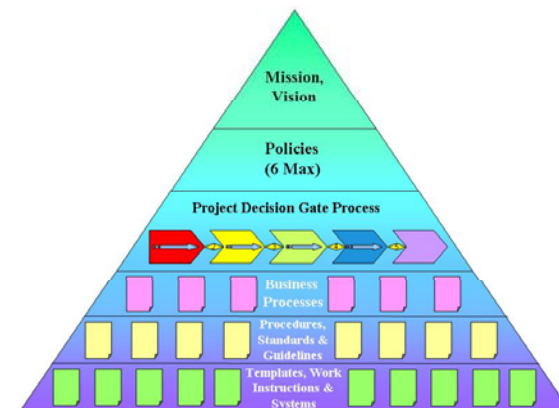
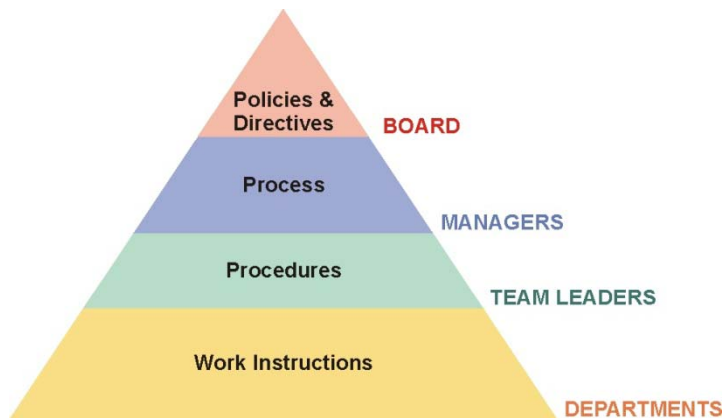
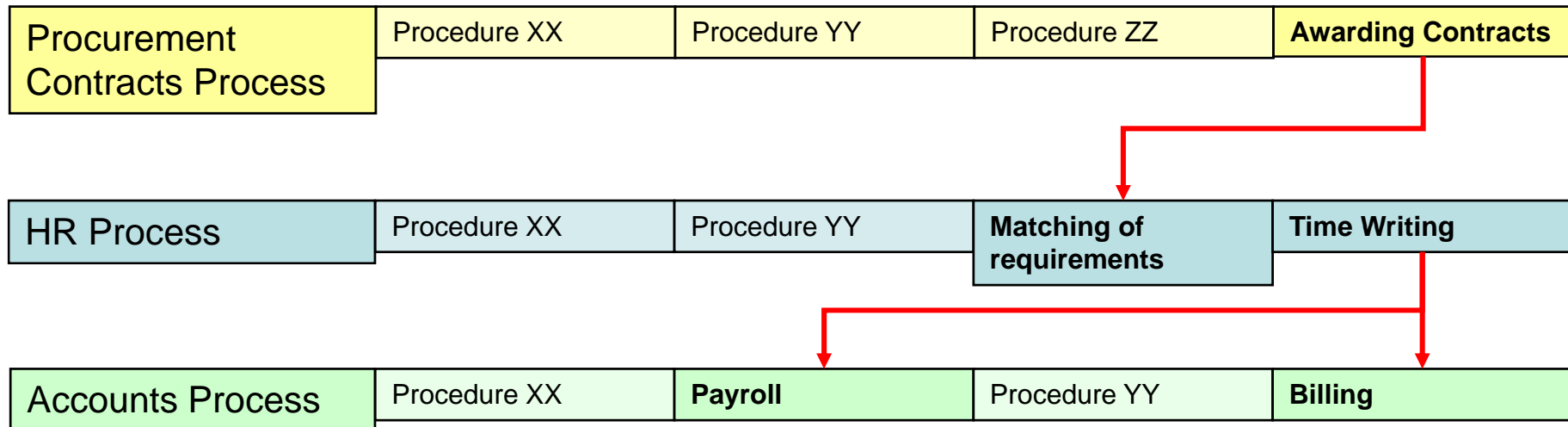
OUTPUT: hand draft of flowchart.



Procedures reside within different Processes

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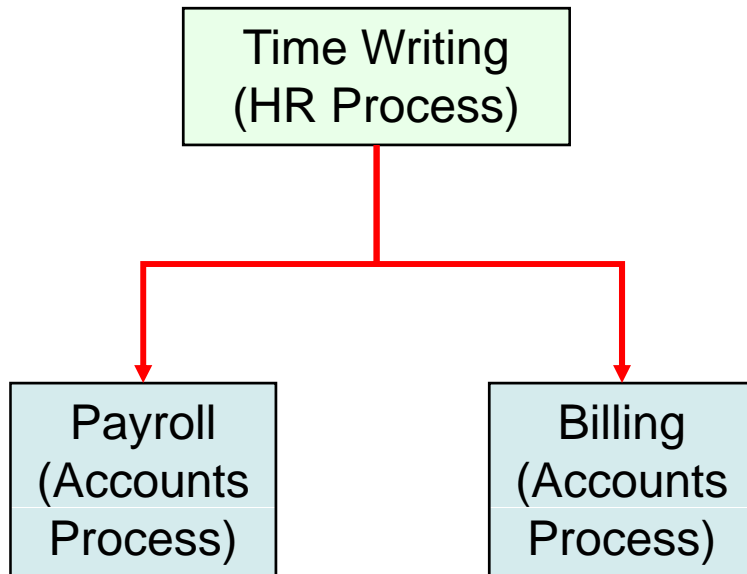
Organisation





Procedures make up the Process

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- Procedures ensure:
 - Repeatability
 - Consistency
 - Completeness
 - Compliance
 - Elimination of duplication of activities
 - Clear identification of owner and custodian
 - Knowledge retention



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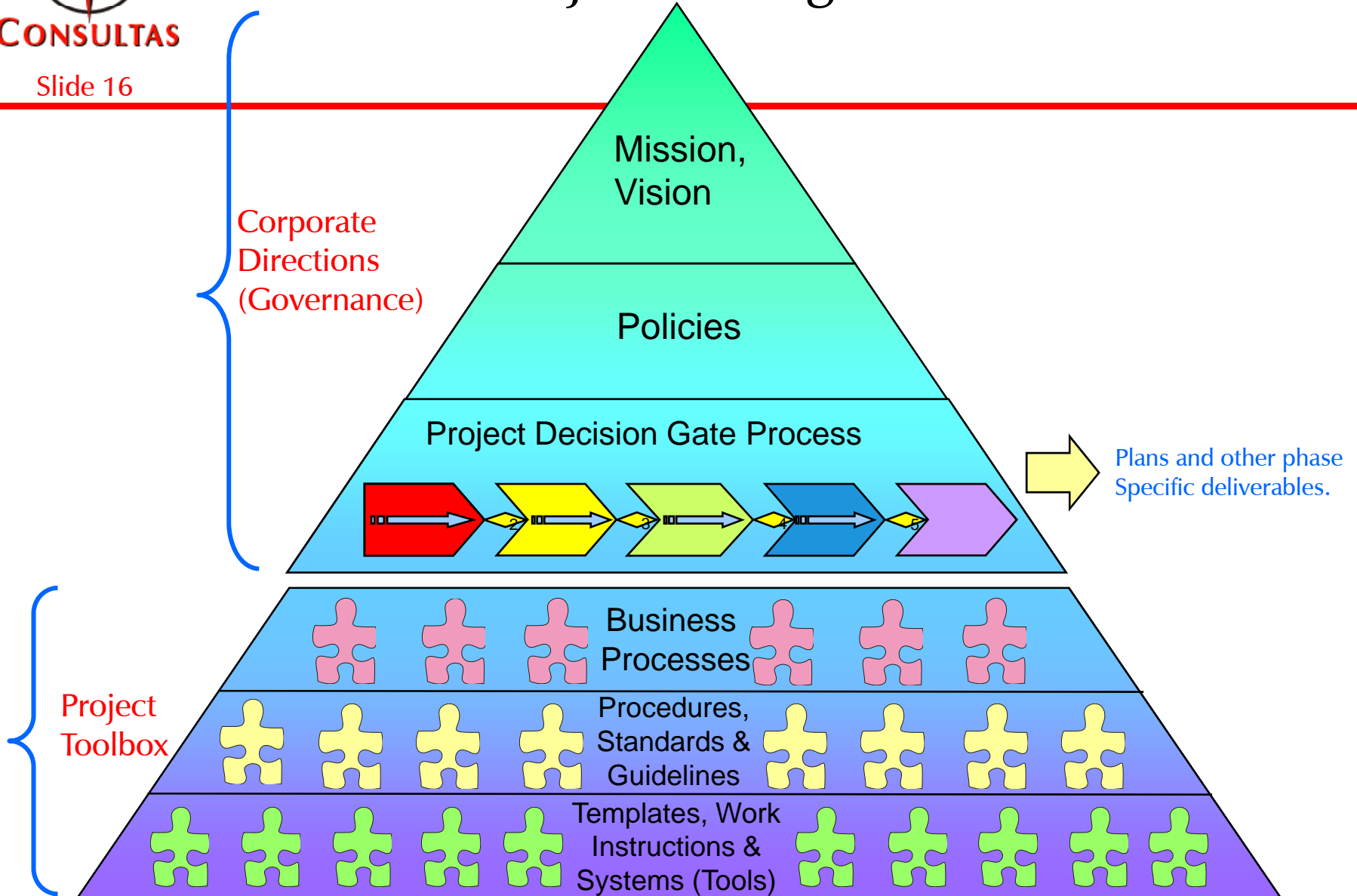
Project Management System (PMS)

- The vehicle for deployment of generic standards, tools and systems towards the successful delivery of projects in a consistent and repeatable manner.
 - Defines the what, why and how of Project Management so that we don't continually reinvent the wheel and generate additional unnecessary work
 - Provides an A-B-C linked approach to complete project tasks efficiently and correctly in a standard approved manner removing a large amount of training and familiarising again Saving time and \$
 - Can be Rapidly deployed, branded and customised to any project Saving time and \$
 - Ensures consistency, efficiency and repeatability of business operations
 - Allow project personnel to focus on innovative and effective project execution
 - Benchmarking and performance can be measured between projects



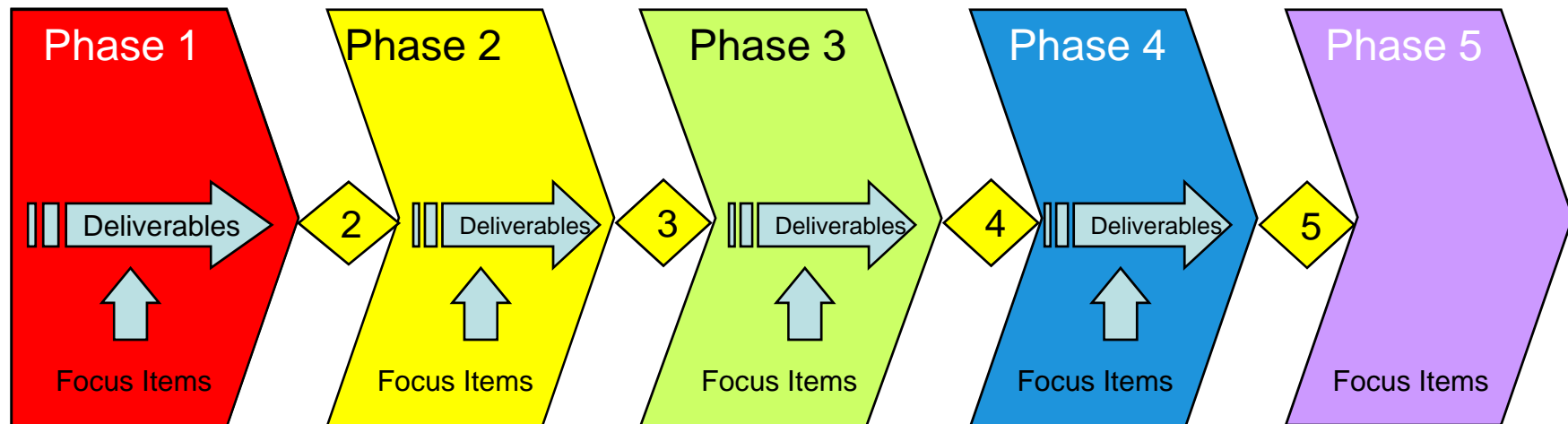
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Possible Project Management Framework



Project Roadmap & Decision Gate Process Overview

- Decision Gates are peer reviews designed to assure Management that the Project Team has completed all the work that is required in a given phase, and that the Project is properly prepared to move into the next phase.





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Some points

- It looks simple, mainly because we have considerable expertise in doing it
- Mapping requires a process mindset, and process thinking, which is less common than you may think
- Process mapping is a team effort and benefits from external facilitation. This ensures impartiality and provides focus to the team
- Once your processes are mapped, we train your people how to update them, so maintenance is easy and fully under your own control



Glossary

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- **Process:**
 - “...a series of actions, changes or functions that bring about an end or result.” (*American Heritage*, 1978, 1043).
 - “A Process is defined as one or more tasks that transform a set of inputs into a specified set of outputs (goods or services) for another person [customer] or process via a combination of people, procedures, and tools.” (Wesner, Hiatt, Trimble, 1994, 38)
 - The sequence of things done to produce an output. A task is just one individual step in the process (Flanigann, Scott, 1995, 6)
- **Procedure** (*Version controlled with standardised distribution *):
 - the sequence of steps to execute a routine activity. Usually involves several individuals or departments.
 - A complete unit of work that specifies the “What”, “When”, “How” and by “Whom” this unit of work will be done. These are a mandatory when developed.
- **Work Instruction:**
 - Instructions or a checklist that prescribe the activity or work to be executed. Usually describes the activity of an individual.
 - Specify the “What”, “When”, “How” and by “Whom” a task will be done. These are a mandatory when developed.