



Why Process Flow?

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Process Flow Defined

Process flow - a task or function that is performed to get a desired end-result.

Process management represents a systematic approach to process improvement.



Process Flow Defined cont.

- Documents a process
- Evaluates the current process in place
- Evaluates how many people are involved in the current process
- Evaluates how many steps are in the current process
- And uncovers potential sources of trouble in the current process

Comparing Processes





The Five Essential Steps to Process Flowing:

1. Communicate why and the benefits
2. Follow the guidelines
3. Determine the level of detail
4. Ask probing questions, for example, who, what, why, and how long?
5. Provide process flow diagram



Benefits of a Process Flow

- To assist with analyzing the process for bottlenecks and duplicate processes
- To help in eliminating unnecessary steps
- To identifies potential dollar and time savings
- And helps identify how technology is or is not being put to use



Successful companies have distinct processes in place defined by key processes and measurements based on customer requirements and priorities.

They define and implement strategies to keep each process measure in control and proactively look for ways to keep improving processes.



"My friend, saying that you don't have time to improve your thoughts and your life is like saying you don't have time to stop for gas because you are too busy driving. Eventually it will catch up with you."

- Unknown



Key Elements for Improving a Process

- Identify the process
- Identify potential problems in the process
- Analyze the causes
- Redefine the process
- Communicate the results
- Implement the process changes



Identify the Process

Prioritize processes by identifying those processes that need to be enhanced or changed

How to Prioritize Processes:

- **Priority One:** Those processes you have the ability to change now
- **Priority Two:** Those you can influence now
- **Priority Three:** Those you cannot change or influence



Identify the Process

- Assign owners/teams - someone in the company who has the authority to approve changes made in the process
- Establish guidelines for time lines, responsibilities and tasks



Identify the Process

- Identify Problems in the Process:
 - Brainstorm ideas
 - Refer to customer data and information
 - Break-down processes to the smallest elements
 - Re-prioritize, if needed



Identify the Process

Analyze Causes:

- Root Cause - the most basic cause of the problem
- Talk to Customers/Suppliers - really understand their needs and get their input
- Collect Data to Validate Concerns - measurements
- State the Problems - be clear and specific - a problem statement
- Benchmark - sharing Best Practices



Identify the Process cont.

Redefine the Process

- Eliminate Steps - increased efficiency = save money and time
- Set New Measurements - begin tracking the improvements
- Brainstorm New Ideas - ways to solve the problems and make improvements
- Document New Process - excellent training tool; shows reduction in steps



Identify the Process

- **Communicate the Results**
 - Tell associates, customers and suppliers before the change happens
 - Be a missionary - tell others about your success



Identify the Process

Implement

- When you take action to change - Do It!
- After the plan is communicated - evaluate and inspect the new process
- Implement your new process



Process Flow Terms

- **Ah-Ha** - A new idea that comes out of the process flow session that is captured for later consideration.
- **Parking Lot** - The tasks, lack of materials, redundancies, etc. that make one's job cumbersome. These items are captured for later consideration.



Process Flow Terms

Process Flowchart - Gives a pictorial representation of a process showing the steps, decision points, and flow.

The flowchart should depict how the process is actually being performed on the day the process is charted - not the way it was intended or you wish it to be.



Process Flow Terms

Opportunities For Improvement (OFI)

The Ah-Ha's and Parking Lot items are turned into positive statements and presented as opportunities for improvement within the office.



Process Flow Terms

Debrief Meeting - Session where the Leadership Team analyzes the process and begins to look for ways to eliminate unnecessary steps, eliminate duplicate steps, move to a paperless environment and optimize the use of technology.



Process Flow Terms

Action Plan - A spreadsheet that lists each Opportunity for Improvement that the Leadership Team decided to implement.

The Action Plan lists the OFI, who it is assigned to, the target completion date, status updates, and completion date.



Process Flow Terms cont.

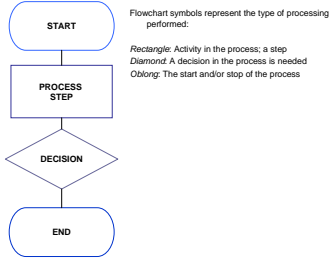
Action Plan - Target Date Guidelines:

- "A" Priority - 30 Days from Debrief
- "B" Priority - 90 Days from Debrief
- "C" Priority - 6 Months from Debrief
- "D" Priority - 1 Year from Debrief



A flowchart is a pictorial representation using special symbols to show each step in a process.

Flow Chart Symbols





“ . . . we ended up seeing the value in the cost savings spreadsheet. We now see that we have made great strides in savings due to process changes and see where the logic in measuring those process changes has value”

Deborah Rozacky - Rockport, Texas

“ We already have an additional \$6,000 in savings to add to the \$4,400.00. It's very rewarding to see our staff get involved – they are happy that they are contributing, especially in such challenging economic times.”

Debbie Keeland - San Antonio, TX



Paper Facts



- 1 ton of paper = 400 reams = 200,000 sheets¹
- 1 tree makes 16.67 reams of copy paper or 8,333 sheets¹
- 1 ream (500 sheets) uses 6% of a tree (and those add up quickly)¹

<http://www.printgreener.com/earthday.html>



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Cost Savings Analysis

- Study steps eliminated or changed as result of Process Flow Debrief Meeting
- Implement changes and training to fully utilize technology



Cost Savings Analysis/ROI

- Determine type of savings:
- time/labor using before and after "time-in-motion" studies vs.
 - Material costs (paper/toner)
 - Postage
 - Storage

Analyze true cost savings and estimate future savings

Calculate cost savings as of month of implementation and annualize



Questions?

Thank you!

THANK YOU!

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