

Process documentation cadence

BPMN workshops

A The first mapping session

Documenting a process, especially if it has never been mapped in a precise and standardized manner before, can feel daunting and unnecessary. *“We all know what to do and how to do it!”*

While this knowledge is exactly what makes you a valuable expert, keeping it in your mind alone creates significant transaction costs; just remember how often you had to run colleagues or externals through your processes so they can connect their work to them.

The effort you put in this mapping of processes will not only make it easier for others to contribute, but also for you to communicate your suggestions and needs – in a visual way that makes even highly complex operations much easier to grasp and explore.



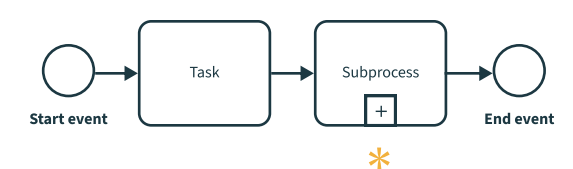
Video Session

Process mapping is faster in person. But when teams are joining from far away, online works just as well.



BPMN screen sharing

Our mapping tool of choice allows for real-time collaborations, but we use whatever tool you prefer to...



Create happy path

... lay down a basic overview of the individual tasks and subprocesses that make up a process – a *“happy path”*.

- Complex subtasks are marked for later expansion.



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B Session series

Most of the more detailed mapping happens in a series of workshops across a week or two. Ideally, we will have only a few long sessions instead of many shorter sessions, because the mapping teams need to “get into the groove” at the beginning of each session; the more intricate the process map gets, the more these add up.

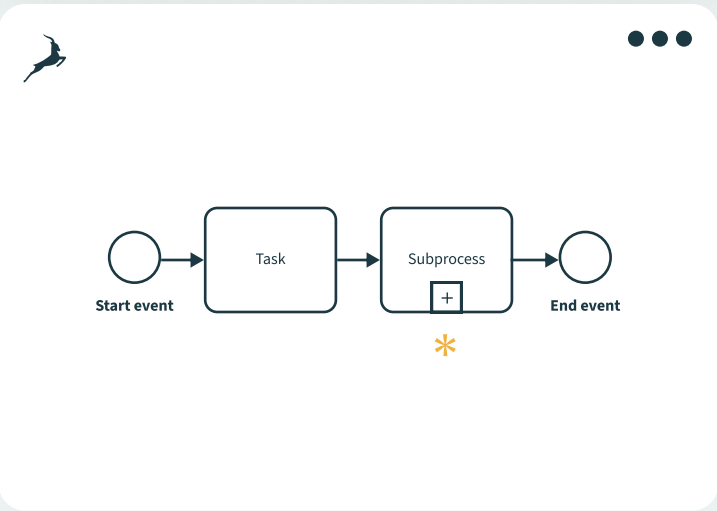
In between the mapping sessions, we reach out to individual participants to get clarity on details they brought up, but didn’t have to take up the remaining team’s time and attention.

During these mapping “breaks”, we provide access to the process diagram in real time, as we clean it up and it evolves, and you are welcome to add comments and edits. We encourage this extensively, since these comments often become the agenda for upcoming mapping sessions.

1 Initial mapping

Basic detail level

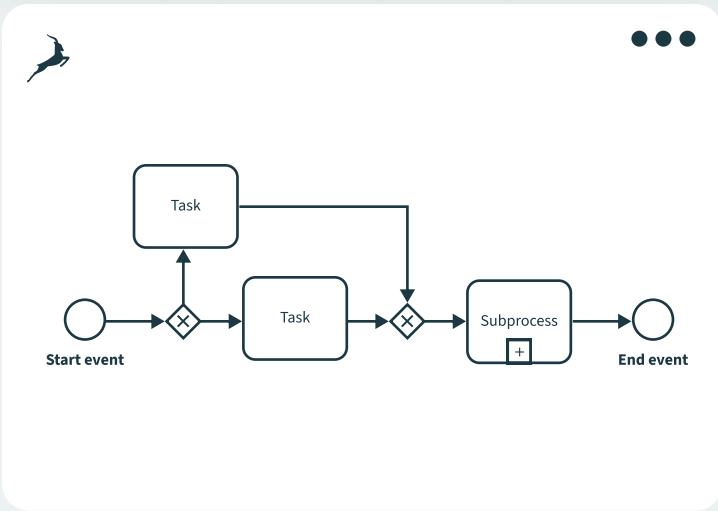
The first few sessions have created and refined a top level process overview.



2 Early iterations

Advanced detail

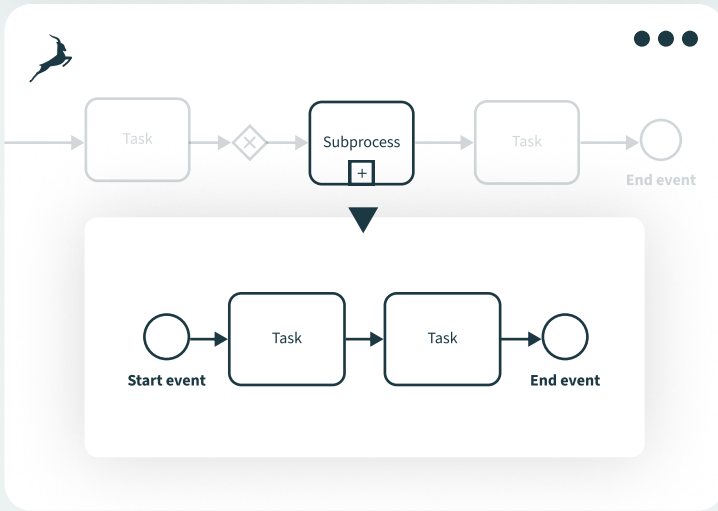
In subsequent calls we go into detail and add operational logic and variants.



3 Wrapping up

Final detail level

In the final calls we complete the roles, systems and data involved in the tasks.



BPMN workshops

© Cleanup & consolidation

Once we've fully documented each individual team's version of the process, whether the teams are different countries, locations or business lines, we look for similarities and common patterns.

We then engage with you, the experts, to seek clarification regarding these observations: *do these two teams actually follow the same sequence of steps, only under another name?* We use this as the basis for designing a global, consolidated process map that contains every team's specific variants, so you don't have to wrangle dozens of individual maps in the future and can see correlations and dependencies.

While this is very challenging work, it is highly valuable, especially for organizations with multiple teams that do similar work only in different locations or for different products.

Unit 1



Unit 2



Unit 3



BPMN workshops

D Global consolidation

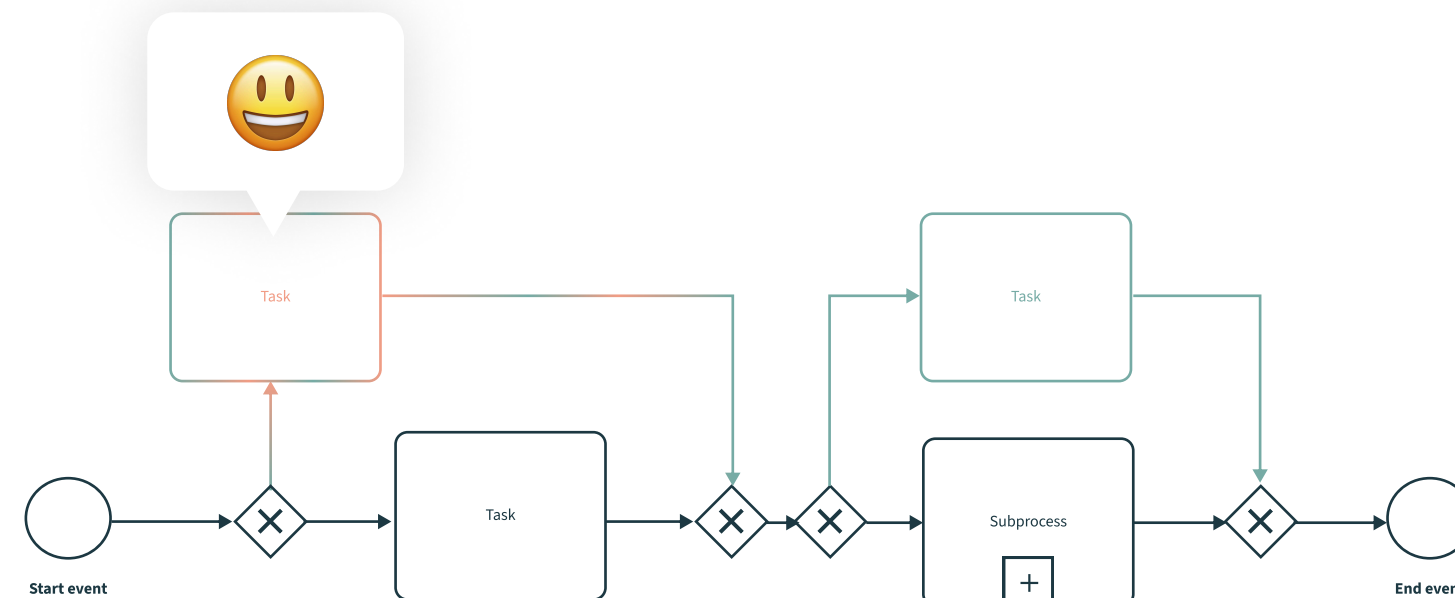
The resulting global process is complex and may seem unwieldy, but it is extremely useful:

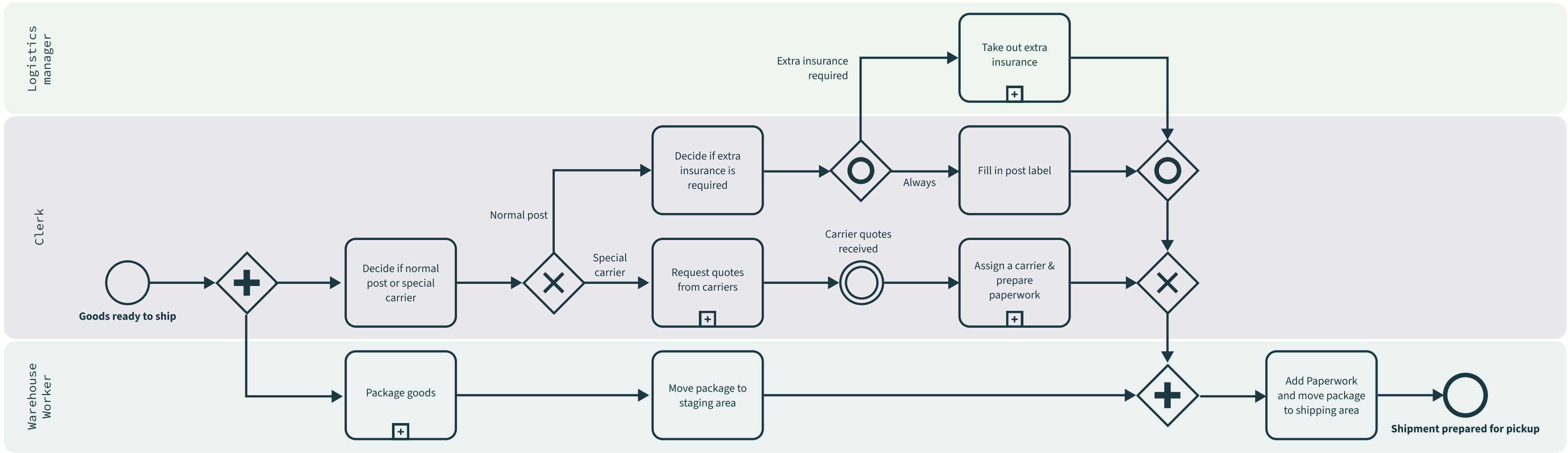
Each individual team, be it country, location, or business line, can trace the gateways and activities of the consolidated process and find their own original process within, while seeing how their work impacts others.

They can also see where they diverge from the practices of similar teams, and see if these other practices might be better for them.

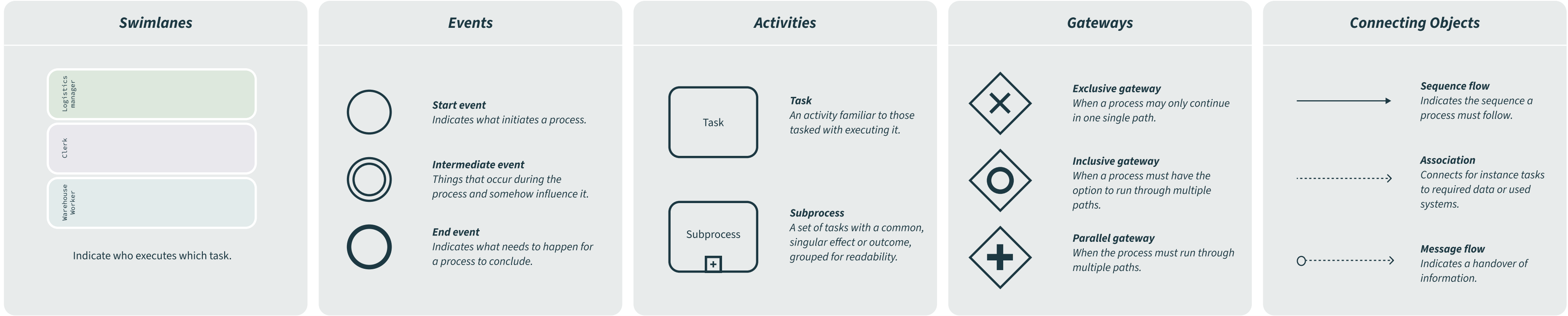
And, most importantly, they can use the diagram to have discussions about process improvements and details with colleagues that are not intimately familiar with their specific way of doing things. All of this on a very factual, accurate basis,

For the organization as a whole, the common, joint activities, the “backbone” of the process, reveal which specific tasks impact every team’s performance and would profit the most from good tools and good support.





BPMN (*Business Process Model and Notation*) is the global standard for modeling business processes in a clear, uniform way.





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