



# A Step-by-Step Guide on Process Mapping



Process mapping is the act of creating a workflow diagram with the goal of gaining a clearer understanding of how a process and its parallel processes work.

Mapping out business processes is a great way to understand all the steps needed to complete a workflow. With process maps, employees—especially in upper-level management, can easily gain an overview of how processes are carried out, how they can be improved or constrained and how many of the steps taken are necessary to drive the process to its end.



# What are Process Maps Used For?



Generally, process mapping is done in order to establish company execution standards or procedures. Some organizations use process maps as guides or diagrams for procedural tasks, and to enforce employees to follow the steps of a workflow in the correct order. However, when relying on maps alone to enforce process standards, many telling metrics go untracked. That's why process mapping is usually a precursor to setting up a workflow management tool, workflow engine or business process management software.

With a workflow management tool, or business process management (BPM) software, you can track the amount of time it takes to complete a process, find process bottlenecks, enforce execution standards with required fields or approvals, automate work and more.

# Process Mapping Methodologies

There are many ways to build process documentation and develop a processes map. You can use flowcharts, diagrams, mind-maps or whatever your creativity suggests. This eBook will explore the most widely used and recognized methodologies models when speaking on business process mapping.

## Value Steam Mapping (VSM)

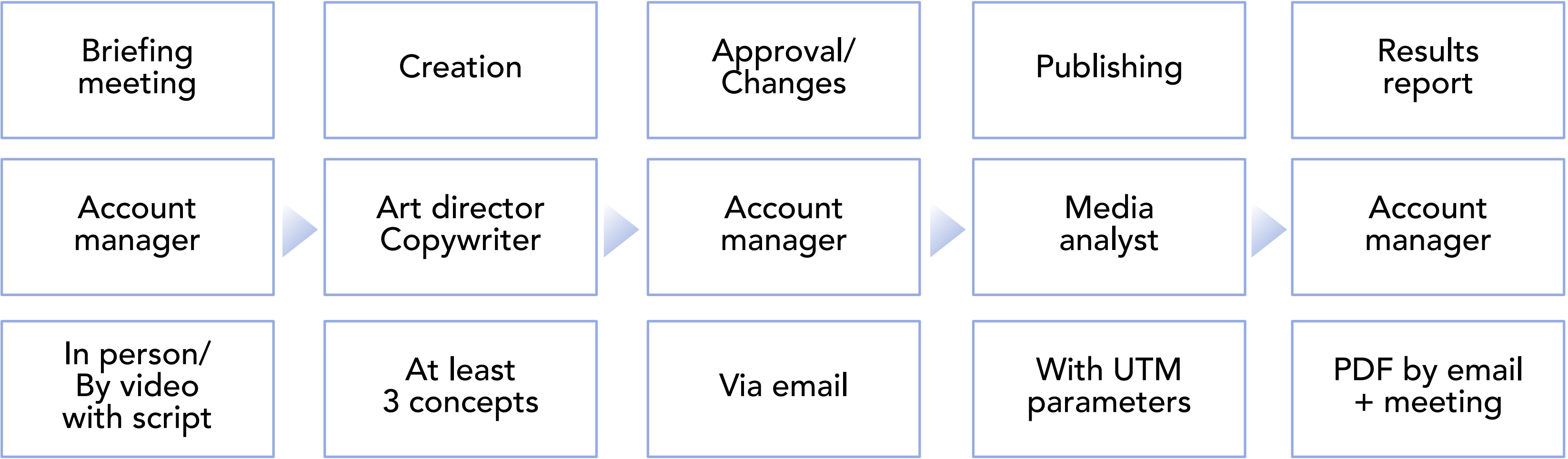
Value Stream Mapping, also known as **VSM**, is one of the most important Lean principles. It is a visual representation of all interactions you have with your customer and the value delivered by each interaction.

Keep in mind that value is everything your customer is willing to pay for. Then, think about what are the steps you need to face in order to deliver this value. All these steps together compose the VSM, which provides big picture visualization of all added-value and wasteful practices, and allows you to analyze and improve your value delivering process.

Here's what a VSM looks like:

### Company X

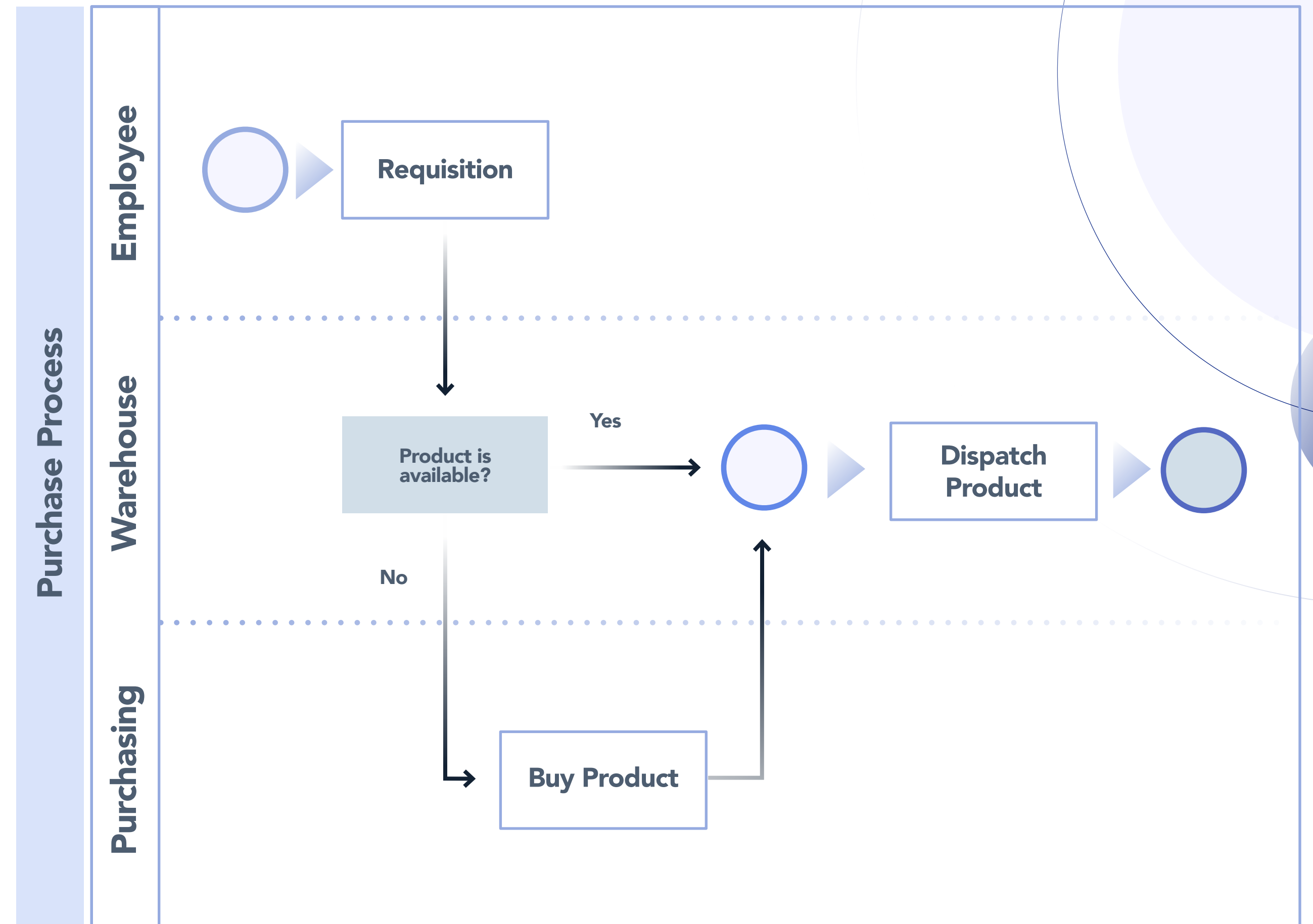
### Company Y



## BPMN

Another method that is definitely worth knowing is the Business Process Model and Notation, shortened to BPMN, and perhaps the most commonly used process mapping methodology. It uses symbols to create a graphic representation of the process – ovals for the beginning/end, rectangles for tasks/steps, diamonds for decision points and arrows to mark the process direction flow.

**The final result is something like this:**



# SIPOC

Last, but not least, we have a SIPOC diagram, that stands for Supplier, Input, Process, Output and Customer. This a high-level process map that results in a very detailed diagram. It looks difficult at first, but actually, it's one of the most intuitive and practical ways to quickly understand phases of a process when things start and end with inputs and outputs.

Understanding SIPOC:

- > **Supplier:** who inputs the information to start the process?
- > **Input:** what does this person input?
- > **Process:** what do you do with this information?
- > **Output:** what is the result after processing it?
- > **Customer:** who did you deliver that processed information to?

*This is the framework:*

	Start Form	Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	Phase 6
Phase Name							
Supplier							
Input							
Process (List of tasks)							
Output							
Customer							
Business Rules							

**This is the framework:**

	Start Form	Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	Phase 6
Phase Name	<b>New Requests</b>	<b>Analysis</b>	<b>Approval</b>	<b>Purchase</b>	<b>Deliver</b>	<b>Done</b>	<b>Archived</b>
<b>Supplier</b>	Any employee within the company	Purchase department	Requester's manager	Purchase department	Purchase department and requester	Purchase department	Requester's manager
<b>Input</b>	Purchase request form filled	Purchase request	Best quotation	Purchase order approved	Payment confirmed	Purchase finished	Purchase order not approved by manager
<b>Process</b> (List of tasks)	Form contains: - Requester name - Requester department - Product - Quantity - Preferable due date  Send to purchase department after filling out	Purchase department analyse the request, get in touch with 3 different suppliers, ask for quotations and fill the following information:  - Best supplier - Quotation - ETA	Manager will: - Approve (Y/N) - Justify  If approved, move to purchase phase. If not, move to archived.	Purchase department e-mail the supplier with the PO and payment information. After that, fill the information below:  - Payment Method - ETA - Payment confirmed (Y/N)	Purchase department wait for the product to be delivered and make some final considerations regarding quality.  - Was the product delivered on time? - Does it have defects? - Supplier evaluation, from 1 to 5  After that, purchase department send an automatic e-mail to the requester.	Purchase order delivered and archived.	Purchase order not approved and archived.
<b>Output</b>	Purchase request containing required information	Best quotation	Purchase order approved	Purchase ordered and payment done	Product received	Archieved	Archieved
<b>Customer</b>	Purchase department	Requester's manager	Purchase department	Purchase department and requester	Purchase department and requester	Company's system and purchase department	Company's system and purchase department
<b>Business Rules</b>			System automatically assigne responsables for approving according to the requester department	Supplier receive an automatic e-mail with the PO	If the product has defects, open a new field for more information		

There's definitely not a single, universal way to map your processes – you should choose which methodology to use according to the level of detail you seek.

The methodologies introduced are also complementary: you can use VSM to understand the big picture and value delivered to your customers, BPMN if you want functional flowcharts and a better understanding of where the information comes and goes and SIPOC for detailed understanding of inputs and outputs.

What they all have in common is the ability to provide a clearer understanding of activities flow, people and resources involved in the process, from the beginning to the end.



# How to Map Business Processes Step-by-Step



Now that you know what the process maps are and the advantages of mapping your process and three different ways to do so, it's time to choose one of them. If you're in doubt, we strongly recommend you to use de SIPOC diagram – and start the mapping work!

Ready to get started? Here are **6 general steps** to help you map out your business process:



# 1. Collect Information

This is where you'll truly understand how things happen within your process. Identify what people do what, how they do it, how long they take doing it and what resources they need... gather all the information you can. You can use observation and interviews to collect the information needed – and don't forget to capture and keep that data!

# 2. Establish Boundaries

Identify where/when the process starts and where it ends. We call inputs all activities/triggers that start a process, and outputs all final results. Sometimes a process has more than one end and it's important to map all of them out to determine all possible outcomes.

Imagine a recruitment process – in this case, the input is an application to the open position and the output is either a selected candidate on an archived CV. When talking about a bug tracking process, the input would be a new bug found; and the output a bug solved.



### 3. Identify Suppliers and Customers



As important as identifying where/when a process starts and ends, it's equally important to identify who the key people involved in this process are. Besides the team responsible for executing and managing this process, there are two more relevant participants: suppliers and customers. Suppliers are responsible for triggering the start of your process and customers are the ones who receive the outcome.

### 4. List and Order the Actions



Now that you know where things start and end, it's time to list the steps in between: use an action verb to start describing each step/task. You can either stick to the strictly necessary information or choose to go into detail for every action. Here is an example of the Purchase Process we used on the SIPOC diagram. Listing those actions would be something like this:

- 1 Fill out a **form**
- 2 Analyze the **requests**
- 3 Ask for a quote from **3 different suppliers**
- 4 **Choose the best** quote
- 5 **Send** to the request's manager to approve
- 6 After approved, **send PO** to the supplier **and pay**
- 7 Wait for the product **to be delivered**
- 8 **Evaluate** supplier services



## 5. Business rules and handoffs

Here you require a deep knowledge of the process, the business strategy and how things connect and correlate. Business rules are conditions that make decisions easier (e.g. if a sales opportunity is bigger than US\$10k, it should be assigned to a Senior Account Executive, or if a purchase request is lower than US\$10, it does not need approval), while handoffs represent a change of responsibilities between teams (e.g. handoff between sales and customer success when someone buys your product).



## 6. Review and Optimize

Once your flowchart is done, take a look and see if the process is actually being run the way it's expected to. Do the people involved actually follow the ideal flow? Are there any missing/redundant steps that could be crossed out?

It's essential to use a control system to follow-up on your process execution while keeping you headed in the direction of continuous improvement. Making gradual improvements is the key to running efficient and goal-oriented processes.

# Why Only Process Mapping is not Enough and What to do Now

Having your process mapped is a very big first step and has many benefits, as you can see here. Many do-ers get stuck at this point wondering what they should do with a bunch of paper, diagrams and flowcharts. How will we share and collaborate with everyone? Is it enough to guarantee standardized execution? How can I extract data from my process?

That's the perfect moment for you to get to know Pipefy! Since you already have your process map, what you need now is a way to keep your process execution on track – easily track SLAs, lead time, cycle time, responsible and important KPIs. No matter which methodology you have chosen to map, we can help you model these processes inside our platform and keep up with your business's goals.

The image features a central collage of Pipefy software interface screenshots. The background is a solid blue color with several decorative elements: a large blue triangle pointing right in the top left, a large blue triangle pointing left in the top right, a large blue circle in the bottom right, and a smaller blue circle in the bottom left. The screenshots include:

- A 'Customer Onboarding' dashboard with a 'Done!' notification and a 'Card successfully moved to Done!' message.
- A 'Customer Onboarding' form for a 'New customer' with fields for 'Company Name', 'Customer Name', 'Customer Email', 'Customer Information', and 'Total monthly contract value'. A 'Create a new customer' button is at the bottom.
- A 'Customer Onboarding' pipeline view with 'Sales Pipeline' and 'Recruiting' stages.
- A 'Closure' checklist with four items: 'Customer's use is stable', 'Customer perceives value in using the tool', 'Customer is using the tool often', and 'Customer is increasing their usage'. Below it is a 'Customer feedback on the onboarding process' section.
- An 'Implementation' section with two questions: 'What solution was the client using before ours?' (answer: 'The client did not have a permanent solution available.') and 'What does the customer hope to achieve?' (answer: 'Process stability and control').
- A 'Backlog' section with an 'Assignee' dropdown and an 'Account segment' dropdown.

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**Discover more processes  
you can improve with Pipefy.**