Process mapping – The Brown Paper Technique

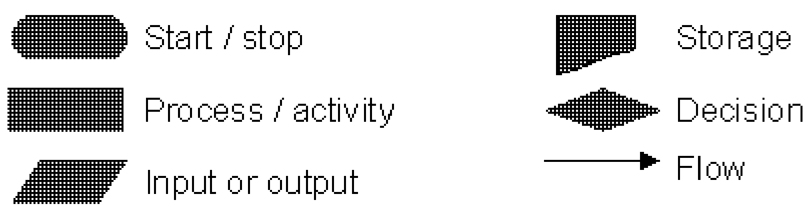
Although originally developed for industry; Process Mapping, with it's 'brown paper technique' can be used for any process, particularly multi stakeholder, such as in the not for profit sector. It is currently being used and recommended by a number of UK public sector agencies: the Training and Development Agency for Schools and the NHS Modernisation Agency.

You can use the process-mapping tool

- to regularly review key processes to ensure that they remain appropriate:
- To provide a structured way of mapping and critiquing an existing or proposed process, in order to examine its effectiveness.
- To encourage a multi-functional team to identify critical elements in the process and locate potential areas for improvement.

The 'brown paper', being 'rough and ready' rather than a precise, neat and tidy document encourages shared understanding and shared ownership of the process.

Before starting try to define the limits of the process under review. As processes are often interlinked it is all to easy to get sidetracked into another process.



The process map should be produced on a piece of paper large enough to hold the project documentation and enable the process to be drawn in sufficient detail.

Collect together samples of the documentation as used at all stages of the process. Documents of interest include those which communicate information or record information. Equally important are documents which form part of the management and control cycle of a project. These might include authorisation sheets, plans, justifications, progress reports etc.

Stick the documents on the paper to as they appear in the flow of the process. It helps to use blu-tac to attach the documents on the brown paper and move them around to fit as the overall story becomes clearer, before finally sticking in place.

Draw the process, working from left to right and top to bottom. Use standard flow chart symbols, as above.

Use black to map the process, blue to capture hard issues and red to capture soft issues.

It should be possible to run through the process and follow the flow of decisions and information. Use post-it™ notes or a different colour (I use green) to mark any areas to return to.

Map the key project phases, with a dotted line around activities, documents and decision points within that phase. Having produced the process map, the real benefit comes from critiquing the existing process. Use post-it™ notes, to record any areas of uncertainty, difficulty or general interest (using different coloured post-it notes for different issues). The team should view this stage as an open brainstorm, where anything goes. Of particular interest are:

- How effective is the overall process?
- How effectively are the management and control elements defined, including decision points, reporting and authorisation?
- Who is involved when, how are projects resourced and managed?
- What information and communication is provided to different parts of the organisation?
- Are any metrics used to manage efficiency and effectiveness?

The critique should generate some specific actions for further consideration and also possible ideas for process improvement. It may also be possible to create further or improved system documentation.

Keep the map as work in progress and return to it whenever there is a need to review the process. If necessary stick clean pieces over parts of the process that are rewritten.

There are a really good set of detailed guidance notes to a process mapping exercise in the UK National Health Service which I think will be of interest at the following link.

http://www.wise.nhs.uk/sites/toolandtechniques/ILG/Basic%20Tools%20and%20Techniques%20for%20Improvement/1/1.2PM.pdf

If anyone has any questions or want to discuss this further I can be emailed at jerry@thedesigngroup.co.uk or call 0044 77131 75426.