



# Workflow Mapping Basics

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## Purpose and Objective

*The purpose of this training is to introduce workflow mapping and provide guidance on how to develop them*

*The objective is to understand why mapping is important, why we develop them, what to focus on, how to do it, and how to get started mapping*



# Content Sections

- Workflow Overview and Background
- How to build a workflow map
- How to improve a workflow
- How to get started



# Why Focus on Workflows?

- At Flow Accel, we believe that the most important thing is how an organization does work
- Work is the foundation that creates and delivers value to the customer
- Leading workflow design and management connects leaders to their teams so they can better lead
- Working on how we work is the only way we can adapt to change and manage the complexity of work in today's business environment
- Leaders help their teams as they work, eliminate or reduce the need for status updates and reviews, which slow teams down
- It can create a competitive advantage for a business

Workflow design and management can help deliver results, improve work-life balance, and scale the business all at the same time

# STEVEN SPEAR

## THE HIGH VELOCITY EDGE

The culmination of over 2 decades of research trying to figure out why some companies stand out among their peers is summarized in Spear's book, "The High Velocity Edge".

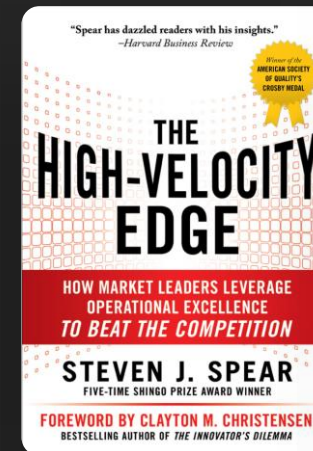
### DISCOVERIES

- It is a **level playing field**: same access to tools, people, and resources
- Standouts exist in **every industry**, from R&D to manufacturing
- The difference between standouts and the rest of the pack is **the management system**
- The management system that has the key to success is the **Developmental Style Leader**
- The standouts have created a **competitive advantage**
- They have created a system that can **outlearn their competition**

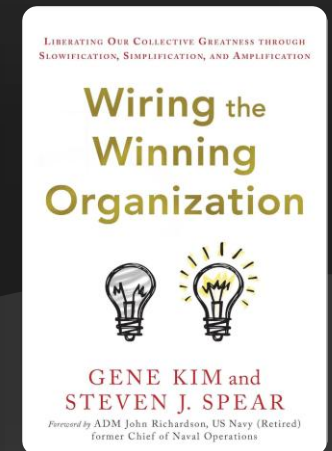


STEVEN SPEAR

One of the Flow Accel Greats



4 Capabilities



Social Circuitry



# The High Velocity Edge – Steven Spear

The companies that get ahead and stay ahead do these four things

1. The design work so that problems can be seen in real time
2. Once problems are identified, they are swarmed to understand the root cause when solving problems, they focus on building new knowledge
3. The newly created knowledge is shared across the organization, local learning becomes global knowledge
4. The leadership fosters the development of capabilities 1, 2, and 3. The leaders are performing normal leadership activities, such as setting vision, strategy, goals, and allocating resources, but they are also teachers and mentors focused on continually growing their organization's capabilities.



# Many Reasons to Develop a Workflow Map

Many possible reasons to develop a map

- Most popular reason is to solve a problem
- Improve a workflow: reduce cycle time, improve quality, reduce scope ... etc.
- Scale a workflow to get more output with the same effort or investment
- Understand how work is done across teams
- Facilitate creating workflow documentation
- Training new people
- Understand the impact of an organizational change
- Design a new workflow that doesn't exist
- Adjust resource allocation



# Workflow Mapping

A workflow map is the visualization of how people do work

- At a high-level, it is the roles, responsibilities, and sequence of activities
- Work activities flow across organizational teams over time
- Work starts somewhere, and it ends somewhere
- Information, data, and material flows as people work
- Workflows can reflect people's interactions with systems, tools, or instruments



# Workflow Mapping Building Blocks

Role

The role that performs an activity or task

Activity  
or Task

The activity or task that is performed by the role

Marker

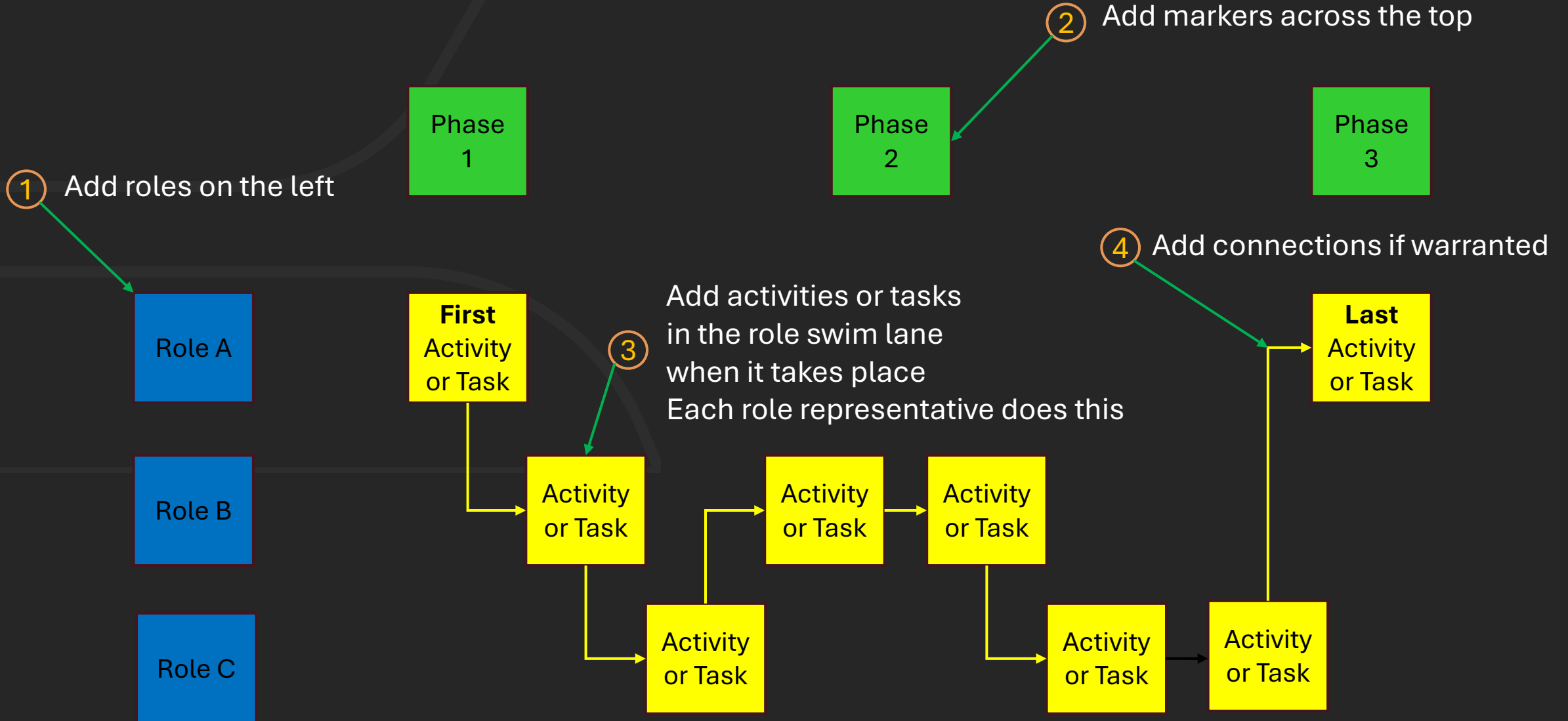
Delineates activities and tasks in time, work phases or hours/weeks/quarters

Break  
Point

Represents a workflow defect, a defect is where the workflow broke down or a problem occurred



# Building a Workflow Map





# Pre-Work to Improve a Workflow

Define what problem needs to be solved

Define the expected outcome

→ These help determine what is mapped, clarify what roles need to be involved, and helps determine the level of detail

→ This is done with the facilitator and key team members, then all are brought in for alignment

Decide where the workflow map will start and stop

→ Define the first and last activity or task

Clarify what roles are required to develop the workflow map

→ Get one representative per role for mapping

→ Participants need to be the ones doing the work, not their manager or some rep

Best practice is that all roles do the mapping at the same time

→ The team learns as the map is developed, especially across activities, roles, and teams



# Improving a Workflow Sequence of Events

- Pre-Work Session: Focus, Team, Timing, Problem, & Outcome
- Initial Kick-off: Align team and get feedback
- Current State Assessment: Map out how the work is done today
- Discovery Analysis: Add breakpoints to map
- Future State Plans: Design the future workflow to eliminate the breakpoints
- Flow Walk / Report Out:
  - Team walks through the map to share discoveries and clarify next steps with leaders, stakeholders, and broader team
  - Follow-up: Progress, help needed, and feedback





# Tips for Improving a Workflow

- Anchor on the problem statement and expected outcome
  - As the map is developing, test it: Is this aligned to the problem? Outcome?
- Develop as few activities as required to encompass the flow of work that surrounds the problem that emerged. This will save time.
- The problem defines the level of detail on the map and is your guide
  - For a current state map, focus on how the work was performed last time, interview people if required, and if someone can't attend, that can help determine how it was done
- DO NOT talk about fixes or potential solutions until after the current state map is fully developed and all the breaking points have been identified
  - This can double or triple the time it takes to develop a current state map
  - Problems will likely emerge that are out of scope for the problem and the desired outcome; someone can capture them in a list and deal with them later



# What is a Break Point

Break  
Point

Breakpoints are places in the workflow where problems occur

- Steven Spear's Breakpoint Categories
  - System: The workflow delivered an undesirable result
  - Flow: The sequence of activities or tasks is problematic
  - Hand-offs: The hand-off between activities or tasks that didn't go right
  - Method: Not able to perform the activity or task for some reason

Other perspectives (still within the categories above)

- Delays in delivery or activity completion
- Rework is having to do something over again that could have been done right the first time
- Reflection on how the workflow performed last time (issues, painful?)
- Single point of failure, only one person can do something
- Can't find information, or information is not up to date or wrong

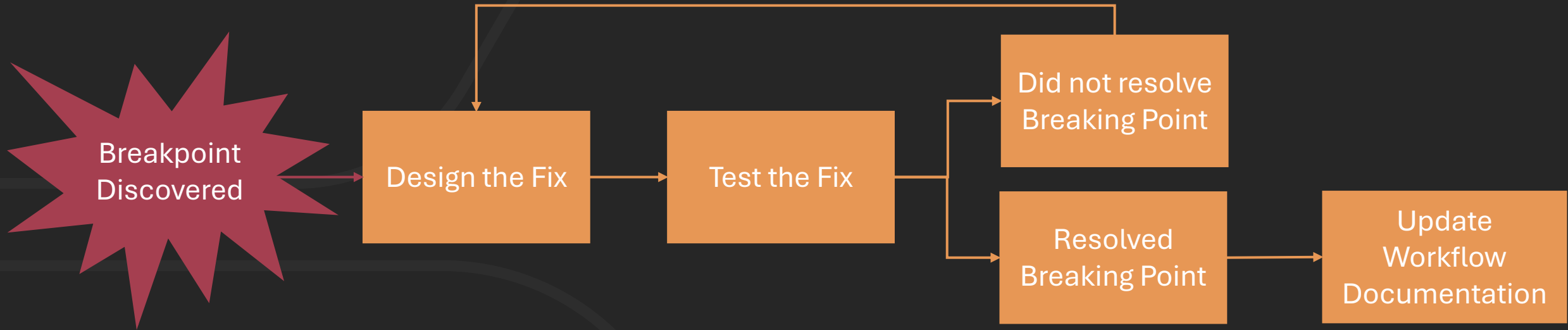




# How to Fix a Break Point

- To fix a workflow breaking point, the way work is done today needs to be modified to eliminate the breakpoint from happening again in the future
- Example #1: The data required for a report was not ready when needed to create and deliver the report on time.
  - Root Cause: the team delivering the work from the previous step didn't realize that the next team needed the information a week in advance to provide the report on time
  - Breaking Point Fix: The teams defined a process to hand off the work on time and with quality
- Example #2: The team responsible for performing the activity does not know how to do the work based on the information that was delivered by the previous step. Role B didn't understand what Role C needed, when, or in what form to perform the activity.
  - Root Cause: The person who attempted to perform the activity was not sufficiently trained, and the data that was delivered was different from what it was last time and from what was expected. The data provided did not match the tool Role C uses to enter the data.
  - Breaking Point Fix: First, training was developed, delivered, and the workflow documentation was updated. Second, the teams worked together to modify the data to align with the tool.

# Improvement and Integration



- Every time an activity is performed, it is a test
- Every time it breaks, it needs to be fixed
- Workarounds should not be tolerated
- Workarounds will eventually cause problems
  - This slows down the delivery of value and consumes work capacity
  - Problems in activities can impact other connected activities
  - Letting them propagate through the system is a recipe for not having a business to run



# How to Get Started

- Experiment
- Map out a workflow for something of interest
- Map out anything to get practice
- Use <https://www.drawio.com/> for free and start mapping
- Download my draw.io mapping template to get you started
- Observe
  - Watch and see how many work-related problems are in the system of work
- Connect
  - Send me a note, and I can recommend some next steps



# *Thank You*

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