

Thank you for purchasing one of our Process Triage® Quick Start™ Workflow Maps.

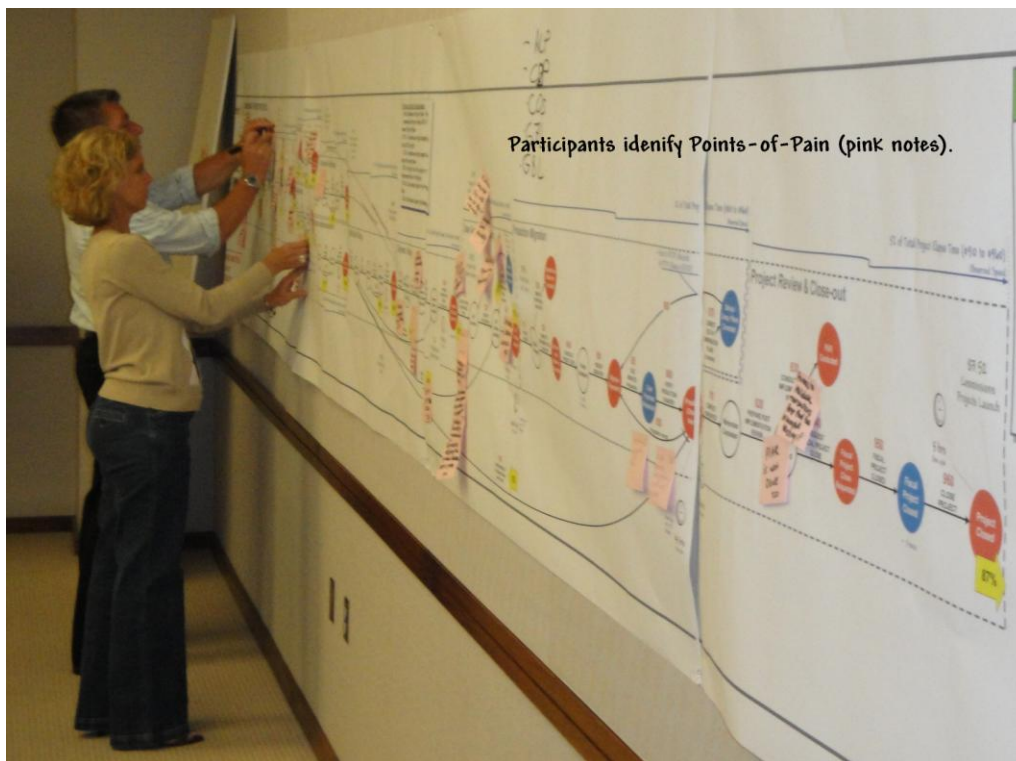
The following overview and Process Triage® Examination notes will acquaint you with the map and how to use it.

After you are familiar with the mapping style, gather your own team and conduct the examinations that interest you. Your map comes with an hour of coaching via web conference or telephone to get you started. Our Process Triage Workshops use the following examination order:

1. Volume and Traffic Flow
2. Speed (cycle time) and Uninterrupted Work Time (process time)
3. Financials & cash flow
4. Other examinations as needed (e.g. RACI , HR, Failure Points)  
[Review Executive / Strategic Objectives]
5. Points-of-Pain (underinvestment symptoms)
6. *Small Now* (action item) & *Big Now* (project) nomination

Post-workshop coaching:

*Small Now & Big Now* prioritization & *Not Yet's* identification



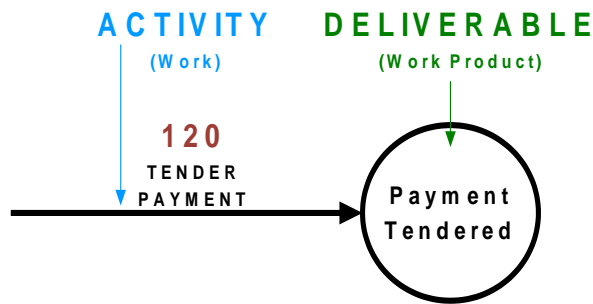
**Overview**

*Process Triage* involves the examination of business process dysfunctions, identification of likely causes, and the nomination of actions or projects that, if implemented, address the problems. These actions and projects are triaged into three categories; “Small Now’s” that one or two people can complete with available resources, “Big Now’s” that require a team to address with available resources, and “Not Yet’s” that are proposed actions or projects which lack resources and may require a business case.\*

**The Process Triage™ Workflow Map Style – Circles & Arrows**

Process problems isolate to three sources; work itself, such as *procedures and processes*, the work’s products or *deliverables*, or *upstream or downstream activities* (business model problems). While a deliverable’s defect suggests a work activity or process error, some process problems do not show up as work product defects directly. For example, an excellent process may produce its deliverable correctly, but the deliverable itself contains a design flaw, or a downstream activity attempts to use a deliverable incorrectly.

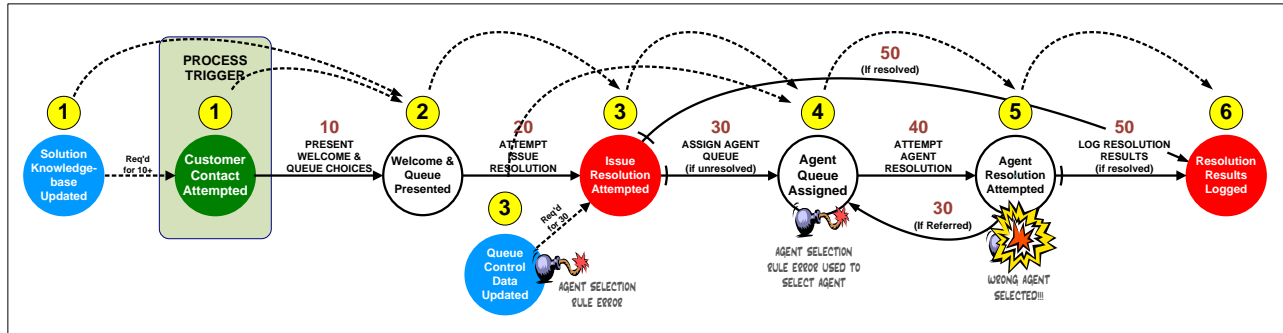
A *Process Triage™ Workflow Map* uses symbols tailored for process triage requirements. Solid arrows (named and numbered) illustrate resource consuming work and circles represent work’s products or *deliverables*. A named activity arrow produces the deliverable circle it points to. The illustration (right) identifies a small scope activity; a *tender payment* procedure (the work), followed by its deliverable, *payment tendered* (work product), which might be physical cash in a register’s till or a record written to an online transaction database. Larger scale activities may be mapped as easily by naming the work generally, such as “Develop Marketing Plan” or “Report Performance”; summaries of very complex, multi-procedure work. More abstract or generally named activities are found in *business models*, which the mapping method also accommodates.



Note: The activity’s number is only a numeric title for quick reference and may only appear to follow in workflow sequence.

Deliverables are *always tangible, physical and measurable things*, as well as an *event*, in the sense that its completion announces something the business may want to know and act upon. In the illustration above, knowing that the “payment tendered” deliverable has completed may trigger an update to a total sales counter, or trigger a warranty period. Therefore, the map may be viewed as an *event map* from a workflow supervision perspective. In the example (top of next page), the numbered yellow circles illustrate the map’s event order.

\* The Process Triage workflow mapping style has two other popular uses. It is ideal for process invention, where the end-state product is understood, but workflow requirements need clarification, and secondly, communicating the relationship between information technology requirements (*use cases*) and the business model in non-technical terms.



**A Process Triage™ Workflow Map is deliverable-oriented.**

The map illustrates work’s deliverables in their *required order of completion* as indicated by the arrows’ direction (see above; deliverables complete in 1 through 6 in order). Downstream activities consume or require the completion of upstream deliverables. This mapping approach presents a fast and effective visual tool for *triage* analysis because root causes of problems are often upstream of the symptom. In the example, an error in the *Queue Control Data* (a blue, external deliverable) causes an incorrect fix-it agent assignment (Activity #30) which, in turn, leads to a failed agent resolution attempt (Activity #40).

**DELIVERABLES**

A deliverable that triggers or causes a process to begin is colored green. Counting this type of deliverable, for example, forecasts total process activity or demand.



A red colored deliverable represents a natural milestone or major work product. Milestone deliverables are measured for quality and cost and often indicate a skill or cost center boundary.



White or plain colored deliverables are non-milestone work products that help illustrate process complexity. Both milestone (red) and non-milestone (white) deliverables consume resources that the process owner controls.



Blue colored deliverables are *externally* supplied, and must be delivered on time and at a necessary quantity and quality. They may require purchase. They are often the work products of other company cost centers or organizations, but are outside the control of the process owner. External deliverables represent loss of organizational control and merit dedicated management oversight.



The “circles and arrows” comprise the essential map. There are two other symbols used to express nondependent upstream deliverables (dashed, non-numbered arrows) and conditional work (a hash mark on the arrow’s base), explained in the next section.

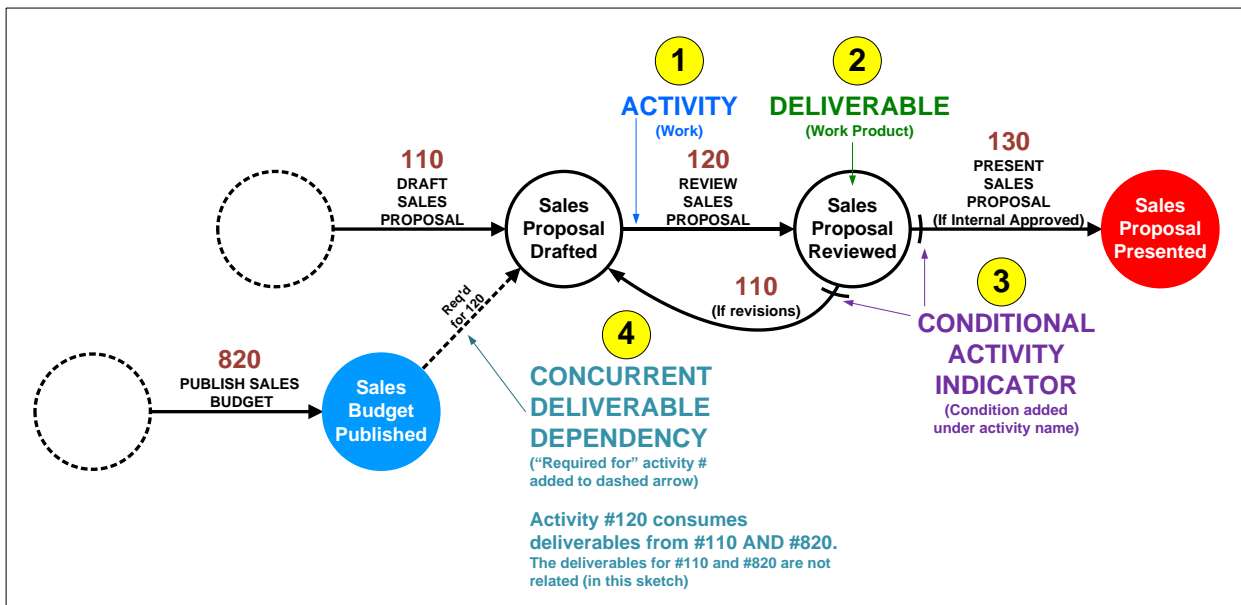
**Reading the Map**

*Earliest Finish Language*

Most workflow illustrations, like data processing flow charts, are *activity oriented*; meaning one reads them from an activity sequence perspective. Typical phrasing would be something like, “After this (activity) one can do this, followed by this (activity) ... and so on.”

Emphasizing the point, a Process Triage™ Workflow Map is a *deliverable oriented* map, meaning the focus is not on the sequence of work, but the *earliest finish order of deliverables*. One ought to begin work on a deliverable (circle) regardless of when its predecessor(s) deliverables are complete as long as all deliverables will be available when needed (JIT).

The reader should focus on the circles, not the arrows, such as; “After this [indicated deliverable] is complete, then the next, [downstream deliverable] may complete” and so on. There is no inference or indication when work starts except for the overall process trigger(s).



*Dummy Activities (recognizing multiple unrelated upstream deliverables)*

Deliverables (circles) are inputs to downstream activities (arrows). Activities *consume* upstream deliverables. Some activities consume the deliverables of unrelated, parallel processes. A Process Triage™ Workflow Map illustrates this dependency by selecting one immediately precedent deliverable and connecting the other upstream and unrelated deliverables to it with a dashed arrow. This dashed arrow includes a label that specifies the activity the additional deliverable is input to.

For example (above), the activity *Review Sales Proposal* requires a Sales Proposal Draft (the deliverable of activity #110) and the external deliverable, a Published Sales Budget. In this illustration, the sales budget is needed for the review, not the sales proposal draft. *This “dummy task” notation is used to allow (with earliest start analysis) the illustration of a critical path.*

*Conditional Activities*

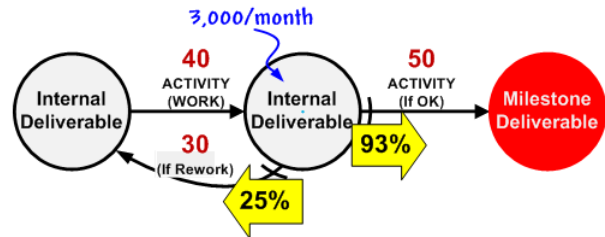
Sometimes a process or procedure is optional or conditional, depending upon a rule, scenario, or other reason. A Process Triage™ Workflow Map considers such decisions or choices as just another deliverable (circle), and notes the following activity arrows with a hash mark and adds the condition in the activity name, in parenthesis. In the above example, the results of *Review Sales Proposal* (Activity #120) result in a rework of activity #110 or the approval *Present Sales Proposal* (Activity #130).

**Process Triage Examinations**

The information necessary to perform *process triage examinations* is contained in *overlay notes*. These notes are of infinite variety or focus, depending upon the business problem or subject addressed, and are used to nominate actions and projects. Examination notes may focus on work activities (the arrows) or their deliverables (circles), or on segments of the map, such as all activities and deliverables related to a milestone.

**Workflow Volume & Traffic Flow**

Identify how often a deliverable is completed during a unit of time, such as 3,000/month (see illustration). The yellow arrows labeled with a percentage of total volume illustrates the percentage of the volume upstream, typically some portion of the 100% volume at the process' start..



Workflow Volume

The above example illustrates a 65% rework at Activity #60, with 85% eventually passing.

If the deliverable has optional subsequent deliverables, capture the percentage of each alternative activity.

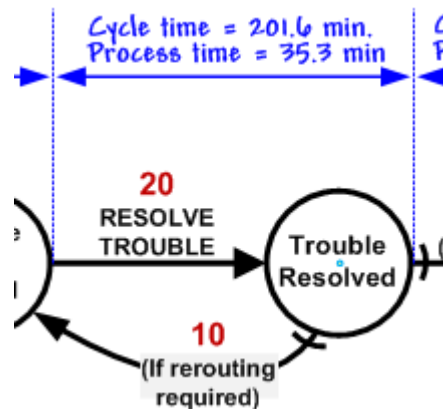
**Speed**

Workflow speed may be illustrated by estimating how long it takes from the time one deliverable (circle) completes to the time a downstream deliverable completes.

Typically, there are two types of time:

Process time: the time the work actually consumes assuming all inputs are on hand correctly and work is uninterrupted.

Cycle time: total elapsed time.

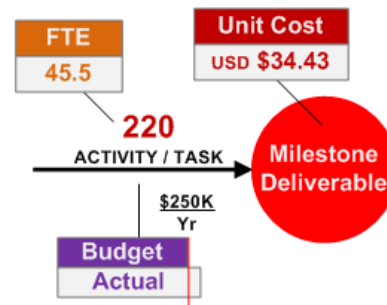


Cycle Time is typically much greater than Process time

**Flow of Money**

A Process Triage™ Workflow Map effectively illustrates a workflow as a flow of money. It is typically derived from the firm's bill of activities or accounting ledgers with accounting experts' assistance.

- FTE: Full Time Equivalent labor rate
- UNIT COST: Cost to produce the deliverable
- BUDGET: Budgeted funds
- ACTUAL: Actual costs



**Financials**

This company consumed \$1.6M/month on 52.5K warranty revalidations and account credit updates.

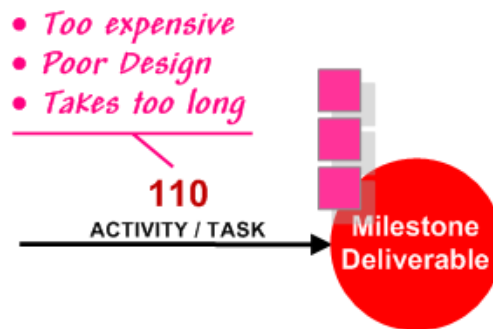
Review the sponsoring executive's strategic objectives before conducting the "Points-of-Pain" triage. It is important to identify the process' points-of-pain in terms of what hinders these objectives.

**Process pain or underinvestment.**

Each square in the stack (three in the example opposite) represents a workshop participant's process pain point. A short explanatory note is included.

Ultimately, each point of pain requires an investment in some form of resource to be removed. If the deliverable is legitimate and necessary, then the investment may be in the form of capital or expense spending, business rules or policy, staffing or information systems modification for example.

The removal of one or more points-of-pain is a natural improvement objective and generates the 'Small Now's', "Big Now's", and "Not Yet's" actions and projects.



**Points of Pain (Underinvestment)**

**Other Triage Examinations**

**Process Failure Risk**

A Process Failure Risk point is an activity or deliverable that is recognized by the process's experts as "must get right" work.

While well managed processes have measurements or metrics that track resource consumption or work product quality, failure risk points highlight where process stakeholders must pay closest operational attention. They are natural points for defensive quality assurance oversight.



Process Failure Risk Points.

**Responsibility / Accountability (RACI) Matrix**

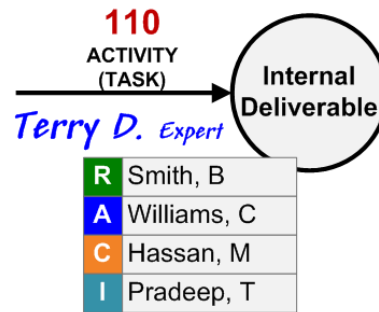
This overlay identifies a deliverable's stakeholders for staff coordination purposes.

R – Responsible; the ultimate business owner and resource allocator; where the "buck" stops. They may delegate resources but not ownership.

A – Accountable; the process owner or steward that produces the deliverable; day-to-day management on behalf of who is responsible.

C – Consultant; obliged to provide expert or technical support as chartered or contracted.

I – Informed; receives specified data or information related to the activity or deliverable as chartered or contracted; typically financial or operational metrics and measurements.



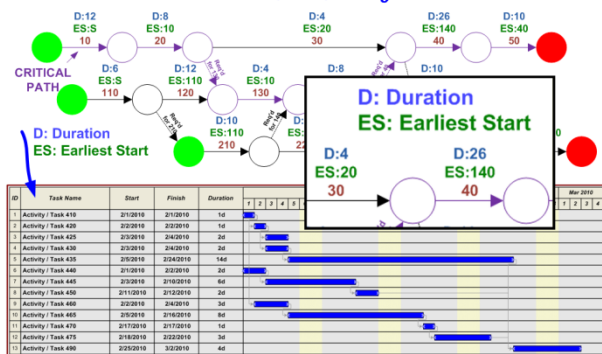
RACI assignments

**Earliest Start (ES)**

Since a Process Triage™ Workflow Map illustrates the earliest finish order of deliverables (circles), an activity that produces a deliverable may start before a predecessor deliverable is complete. The proper workflow design should ensure that all upstream deliverables (inputs) arrive just-in-time.

This overlay is required to construct a GANTT chart from the Process Triage™ Workflow Map

**Work Breakdown Structure (WBS) Design**



**DATA DNA (“CRUD” Transactions)**

Every process failure will trace to a failure of one or more primitive *CRUD Transactions*. *CRUD* is an acronym for *Create, Retrieve, Update, or Delete*, the four (and only four) actions a process can affect on something. CRUD Transactions are the smallest unit of work an information system’s data base can perform. All processes may be reduced to a continuous, contiguous CRUD Transaction chain, similar to biological DNA.

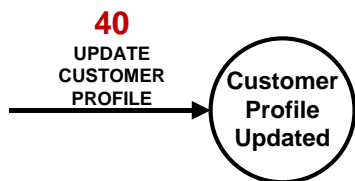
CRUD Transaction analysis typically takes 3x the time needed to sketch the workflow for basic triage examinations.



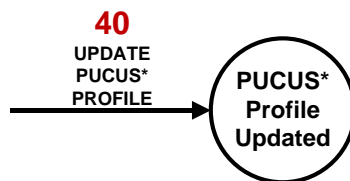
The possibilities for overlay topics are limited only by the imagination.

Map reusability is dependent upon how *logical* rather than *physical* the map illustrates the workflow. The more durable maps express only *what* work or deliverables are involved, not *how* they are accomplished. For example (see below), the *logical* activity is *Update Customer Profile*. There is no specification regarding *how* that is done. The *physical* and incorrect labeling is *Update PUCUS Profile* (apparently the PUCUS System contains customer address data). If it is important for triage purposes to know the PUCUS system is involved, note such by an overlay.

*Correct! (Logical View)*  
Labels include “How”

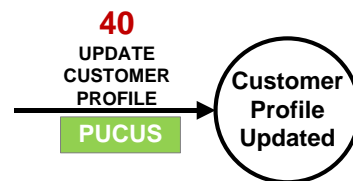


*Incorrect! (Physical View)*  
Labels include “How”



\*PUCUS is an IT System

*Best!*  
PUCUS\* awareness is a note



Process Triage LLC provides expert facilitation workshops for Process Triage™ Workflow Map construction and consultation services regarding their use.

Process Triage LLC

E-mail: [info@processtriage.com](mailto:info@processtriage.com)

Telephone / text message to Joseph (Rosey) Rosenberger, USA 913-269-3410