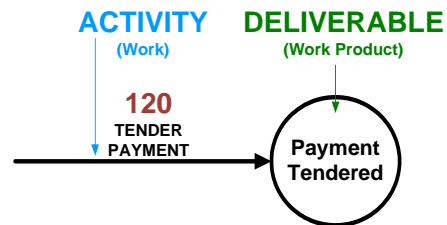


Overview

The practice and methods of finding root causes to highly repeating work flow problems -- *process triage* recognizes the need to isolate problems with both work, such as procedures and processes, and work products or *deliverables*. Obviously, a deliverable's defect suggests work activity or process errors; however some process problems do not show up as work product defects directly. An excellent process may produce its deliverable correctly, but the deliverable itself is flawed; a distinction often important in process triage. For example, what appears to be a process failure or product defect may root cause to a flaw in the *business model*, such as marketing, strategic planning, or customer service. Successful process triage also isolates business model deficiencies.

A *Process Triage Map™* is a workflow diagram that illustrates both work activities, with arrows (named and numbered) and work products or *deliverables*, with circles or nodes. A named activity (solid black arrow) produces the deliverable its arrow points to. The illustration (right) identifies a small sized activity; a *tender payment* procedure (the work), followed by its deliverable, *payment tendered*, 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"; examples of very complex, multi-procedure work. More abstract or generally named activities are found in *business models*, which the mapping method also accommodates.



A *Process Triage Map™* is a *deliverable-oriented* workflow map; it illustrates deliverables in their *required order of completion*, as indicated by the arrows' direction. Downstream deliverables always consume or require the completion of upstream deliverables. This workflow mapping approach presents a fast and effective tool for process problem root cause or *triage* analysis as well as process performance and scenario modeling.

The map *does not* illustrate when an activity (arrow) starts. Rather, it shows which deliverable (in what may be a series of deliverables) must complete before the activity can finish. Therefore, a *Process Triage Map™* does not illustrate a process's critical path without additional analysis.

Deliverables are always tangible, physical and measurable things. 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 (red) deliverables are measured for quality and cost and often indicate a skill or cost center boundary.

DELIVERABLES



White or plain colored deliverables are non-milestone work products that help illustrate process complexity.

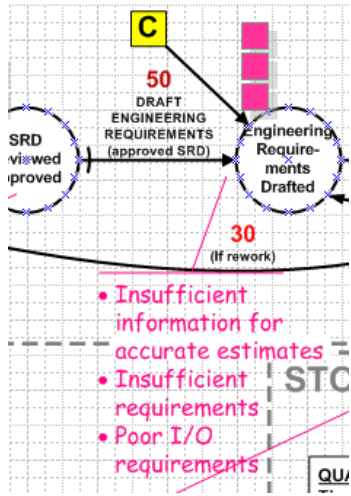
Blue colored deliverables are *externally* supplied that require supply chain support to be available on time and at a necessary quality. External deliverables within a workflow represent loss of organizational control and merit dedicated management oversight.

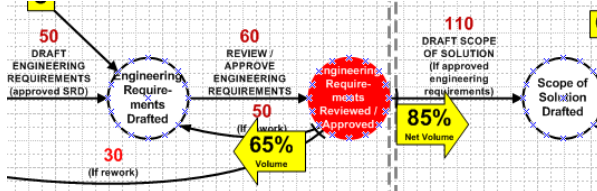
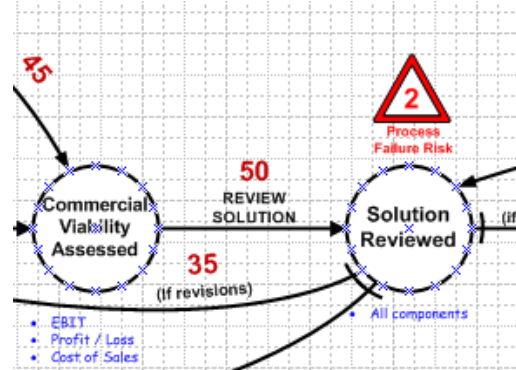
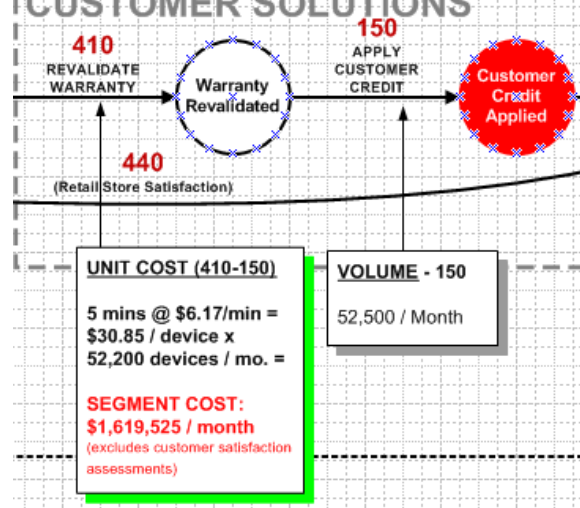
A deliverable is also an *event*, in the sense that it is an announcement of completed work and creates something the business may want to know and act upon. In the illustration above, the map illustrates the work related to tendering a payment (the arrow) and the announcement (the event) that the work is complete; “payment tendered”, and the tendered payment artifact is ready for inspection or use by downstream processes.

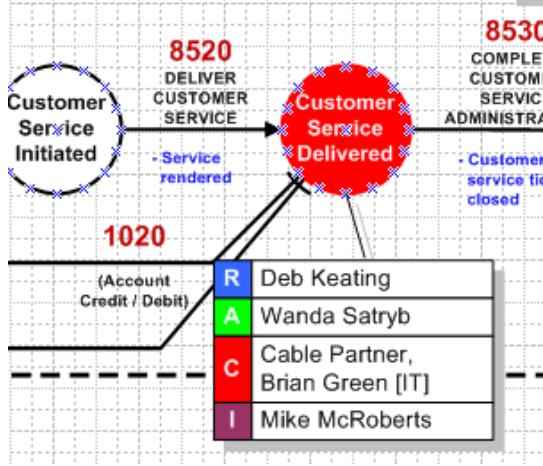
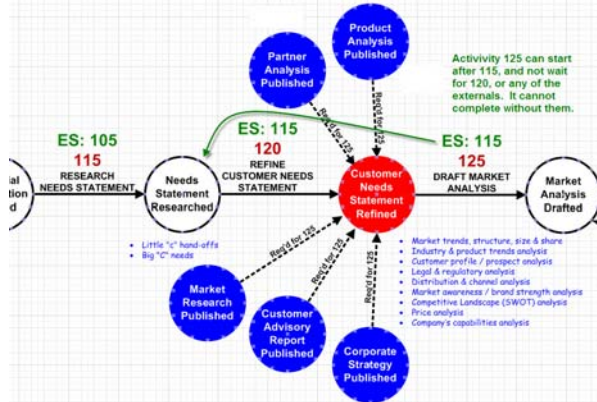
The “circles and arrows” comprise the essential map. There are two other symbols used to express nondependent upstream deliverables (dashed, non-numbered arrows) and conditional work (a hash mark on the arrow's base), beginning on page 4.

OVERLAYS

The most valuable information on a Process Triage Map™ is contained in *overlay* notes. These notes are of infinite variety or focus, depending upon the business problem or subject addressed. Overlay 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.

Sample Triage Description	Illustration
<p>Process pain or underinvestment.</p> <p>Each square in the stack (three in the example opposite) represents one workshop participant's process pain point. A short explanatory note is included.</p> <p>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.</p> <p>The removal of one or more points-of-pain is a natural improvement project objective.</p>	 <p>Points of Pain (Underinvestment) The underinvestment above appears to be engineer analysis labor hours or skills.</p>

Sample Triage Description	Illustration
<p>Workflow Volume</p> <p>The yellow arrows labeled with a percentage of total volume illustrate the amount of work that follows a “next activity” choice.</p> <p>If the next activity should be value adding, not rework or activities that result in wasted effort.</p>	 <p>Workflow Volume</p> <p>The above example illustrates a 65% rework at Activity #60, with 85% eventually passing.</p>
<p>Process Failure Risk</p> <p>A Process Failure Risk point is an activity or deliverable that is recognized by the process’s experts as “must get right” work.</p> <p>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.</p>	 <p>Process Failure Risk Points</p> <p>A thorough “Solution Review” is necessary here.</p>
<p>Unit Costs and Volume</p> <p>A Process Triage Map™ effectively illustrates a workflow as a flow of money.</p> <p>An activity volume and unit cost (derived from the firm’s bill of activities or accounting ledgers) overlay captures an activity’s or deliverable’s expense and how sensitive that expense is to work volume (meaning how frequently the work must be performed).</p> <p>The example (opposite) is from an actual client. The costs were, by Sarbanes-Oxley policy, legitimate and necessary. From a business design perspective, mostly avoidable. The problem was the volume of work, not the obligation to issue credits.</p>	 <p>Unit Costs and Volume</p> <p>This company consumed \$1.6M/month on 52.5K warranty revalidations and account credit updates.</p>

Sample Triage Description	Illustration
<p>Responsibility / Accountability (RACI) Matrix</p> <p>This overlay identifies a deliverable's stakeholders for staff coordination purposes.</p> <p>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.</p>	 <p>RACI assignments Used to design a joint venture organization</p>
<p>Earliest Start (ES)</p> <p>Since a Process Triage 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.</p> <p>This overlay is required to construct a GANTT chart from the Process Triage Map™</p>	 <p>The #125 may start after #115, and not wait for #120 or the five external inputs</p>

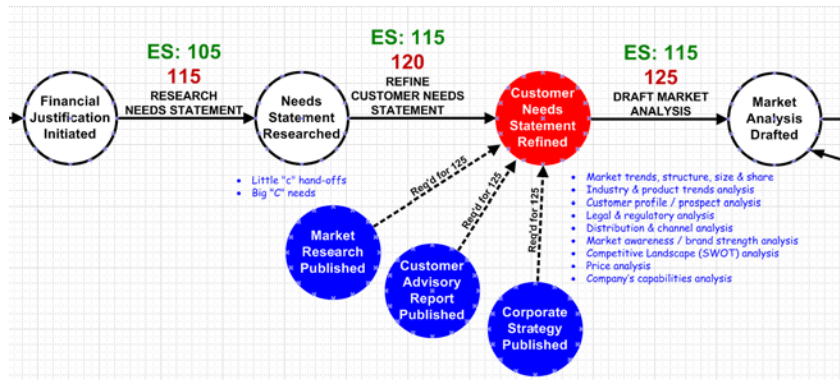
READING THE MAP

Earliest Finish Language

A Process Triage Map™ is a workflow diagram and it is natural to read it using task sequence terms, such as “Work [the named arrows] is performed in the following sequence...” While true, this phrasing implies a task cannot begin until its predecessor(s) tasks have finished. This is not precisely correct, both on the map and in practice.

Emphasizing the point, a Process Triage 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 and ready to be received as long as they arrive just-in-time and work is uninterrupted once started. Therefore, the proper phrasing should focus on the circles, not the arrows; “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).

For example (right), the correct phrasing would be, “After a *financial justification* is initiated, the *needs statement* is researched [the deliverable of activity #115]; then we may complete a *market analysis draft* (#125). Note that the *earliest start overlay* (ES:) on activity #125 indicates it may start when #115 – the Need Statement is researched, and not wait for #120.

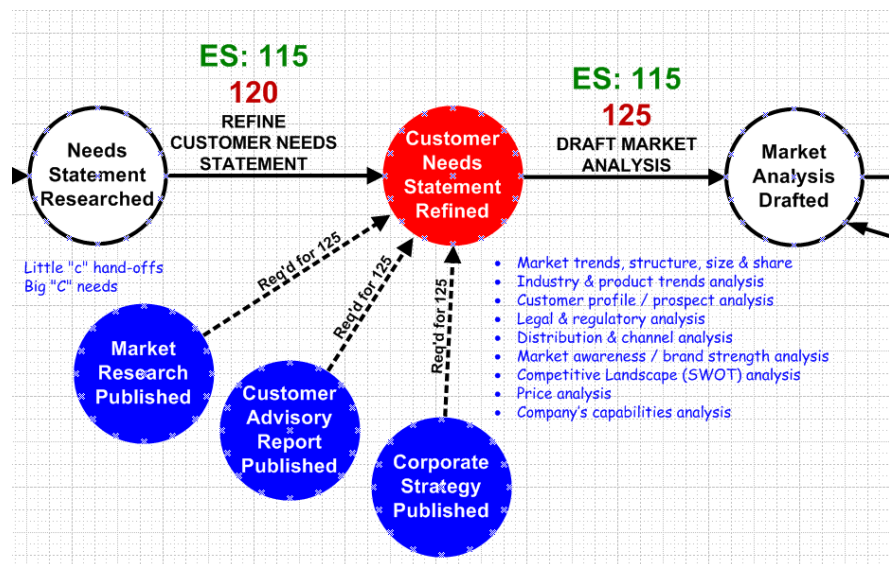


Dummy Activities (recognizing multiple unrelated upstream deliverables)

Deliverables (circles) are inputs to downstream activities (arrows). In other words, activities *consume* upstream deliverables. Some activities consume the deliverables of unrelated, parallel processes. A Process Triage 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 (right) the three external deliverables, *Market Research, a Customer Advisory Report, and a Corporate Strategy* are needed for drafting market analysis (#125); they are not needed for activity #120, the Customer Needs Statement.

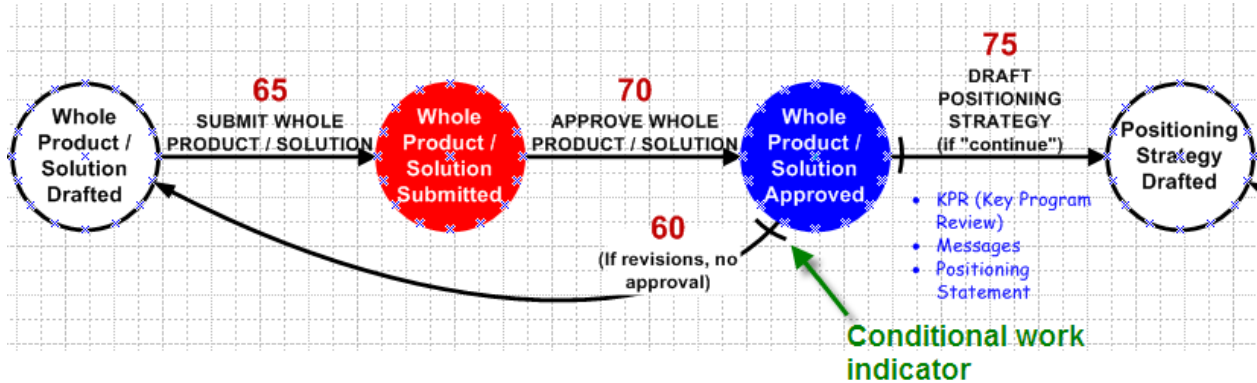
This “dummy task” notation is used to allow (with earliest start analysis) the illustration of a critical path.



READING THE MAP (continued)

Conditional Activities

Sometimes a process or procedure is optional or conditional, depending upon a rule, scenario, or other reason. A Process Triage Map™ considers such decisions or choices a deliverable (circle), and notes the following activity arrow with a hash mark and adds the condition in the activity name, in parenthesis.



Read the example (above) as follows: “After the whole product or solution is submitted [the deliverable of activity #65], the product or solution is approved (#70) by an outside entity (the blue external deliverable). If this approval fails, the work is revised (repeating activity #60), otherwise, we can now complete the positioning strategy draft (#75).”