

Business Process Mapping Fundamentals



- Visual representation of every step, decision, handoff, and delay in a workflow



- Eliminates arguments over how work gets done; surfaces friction



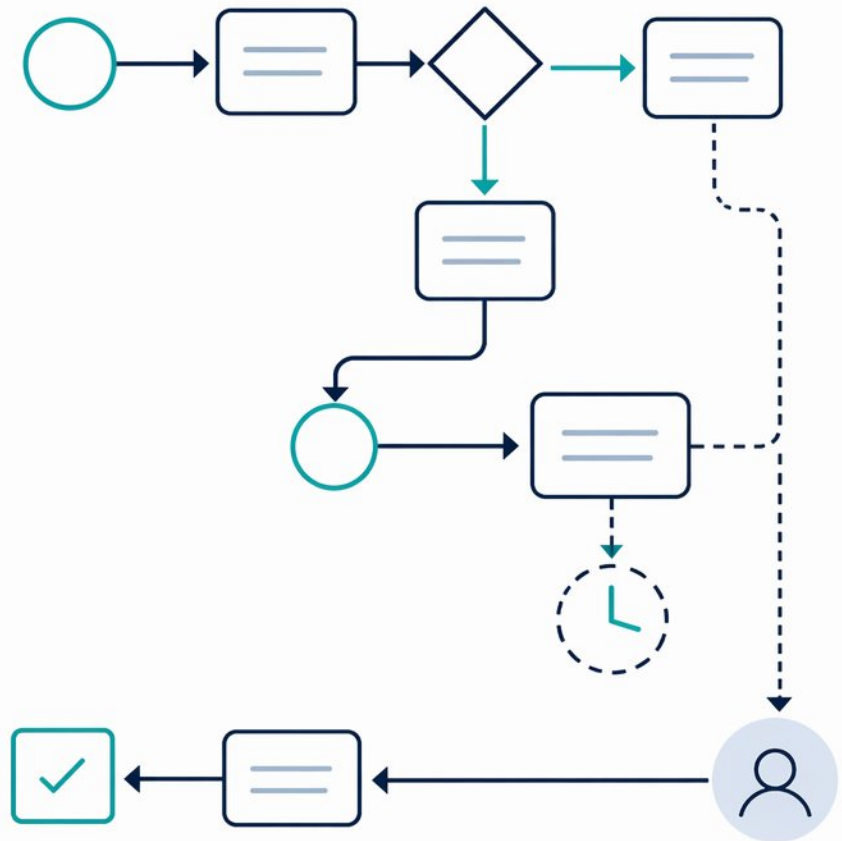
- Process mapping vs. modeling vs. documentation: distinct purposes



- Triggered by handoff errors, rework, complaints, audits, or automation prep



- Course goal: scope, facilitate, draw, analyze, and improve a workflow



Foundational Concepts and Terminology



- Core building blocks: inputs, outputs, activities, decisions, roles, handoffs



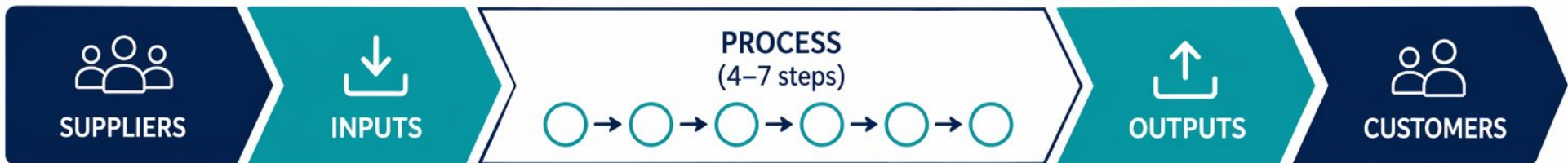
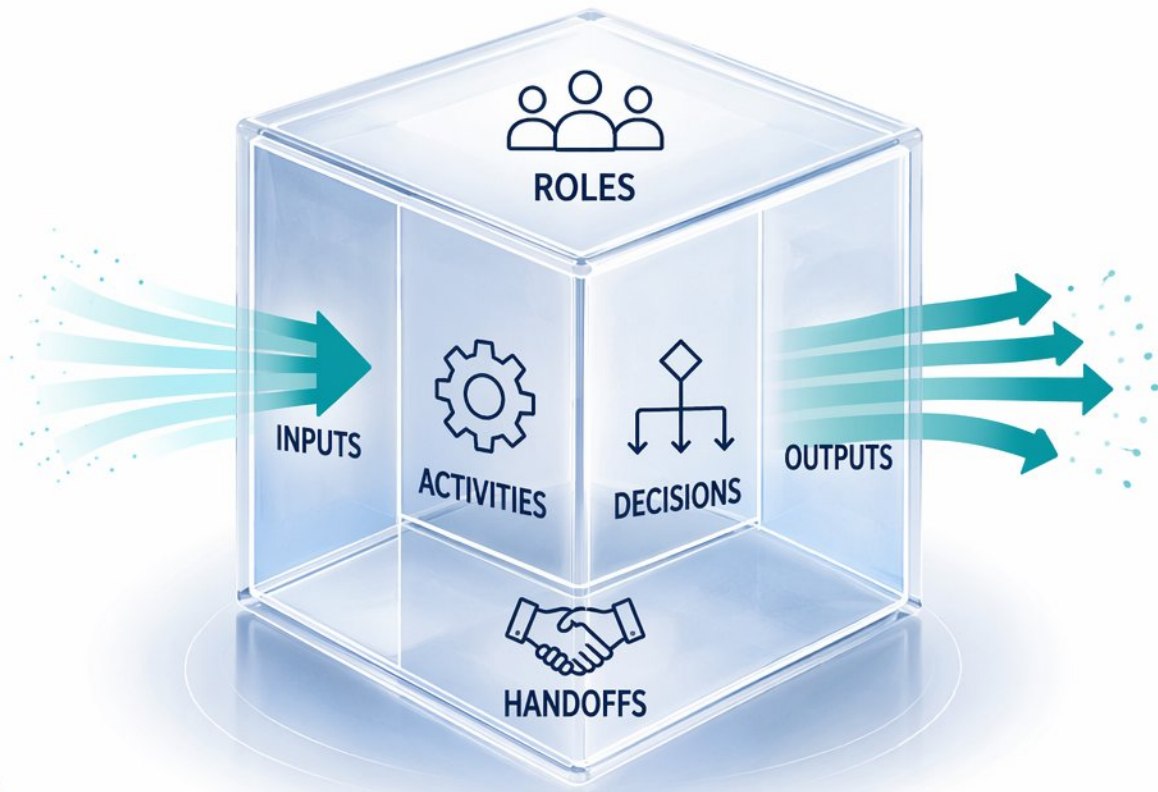
- Process boundaries: define clear start trigger and end outcome to prevent scope creep



- Process hierarchy: L0 value chains, L1 end-to-end, L2 sub-processes, L3 tasks



- SIPOC: high-level scoping tool — Suppliers, Inputs, Process (4–7 steps), Outputs, Customers





Core Mapping Notations and Symbols



- **Standard flowchart shapes:** oval (start/end), rectangle (task), diamond (decision), parallelogram (I/O), arrow (flow), connector circle (ANSI/ISO)



- **Swimlane diagrams:** organize activities by role/department to show accountability and make handoffs explicit



- **BPMN essentials:** pools, lanes, tasks, gateways (exclusive, parallel, inclusive), events (start, intermediate, end) — covers 90% of real diagrams



- **Choose notation by purpose:** flowchart for simple steps, swimlane for cross-functional, BPMN for automation, value stream map for waste

STANDARD FLOWCHART SHAPES



Oval
(Start/End)



Rectangle
(Task)



Diamond
(Decision)



Parallelogram
(I/O)



Arrow
(Flow)



Connector
Circle
(ANSI/ISO)

SWIMLANE DIAGRAM (EXAMPLE FRAGMENT)

 Sales



 Operations

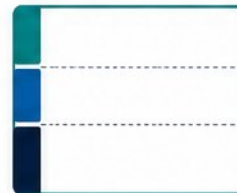


 Finance



BPMN ESSENTIALS

POOLS & LANES



TASK



GATEWAYS



Exclusive



Parallel



Inclusive

EVENTS



Start



Intermediate



End

Planning and Scoping a Mapping Effort



- Define the mapping purpose: improvement, training, compliance, or automation



- Identify stakeholders: process owners, frontline performers, and customers



- Set boundaries with a one-page charter: triggers, scope, and success criteria



- Never start without a clear purpose and agreed scope—bloated maps get abandoned



PROJECT CHARTER



PURPOSE



STAKEHOLDERS



SCOPE



SUCCESS CRITERIA



START TRIGGER

What initiates the mapping effort?



SCOPE

What is in scope, what is out, and key boundaries.



STAKEHOLDER SELECTION

Who needs to be involved and why.

Data Gathering and Workshop Preparation



- Gemba walks reveal workarounds procedures miss



- Workshop: 2–4 hours, 3–8 participants, clear phases



- Facilitator, documenter, participants—defined roles & ground rules



- “Walk me through what happens when...” opens the real story



- Park improvements; map what IS, not what should be



Facilitating an Effective Mapping Workshop



- 90-minute structure: scope, happy path, exceptions, validation, actions



- Enforce "current state first" — park improvement ideas separately



- Handle challenges: structured turn-taking, mark gaps, document variants



- Make the map visible throughout to reduce real-time misalignment

Documenting the As-Is Process



- Map what actually happens: workarounds, skipped steps, manual interventions, and informal checks



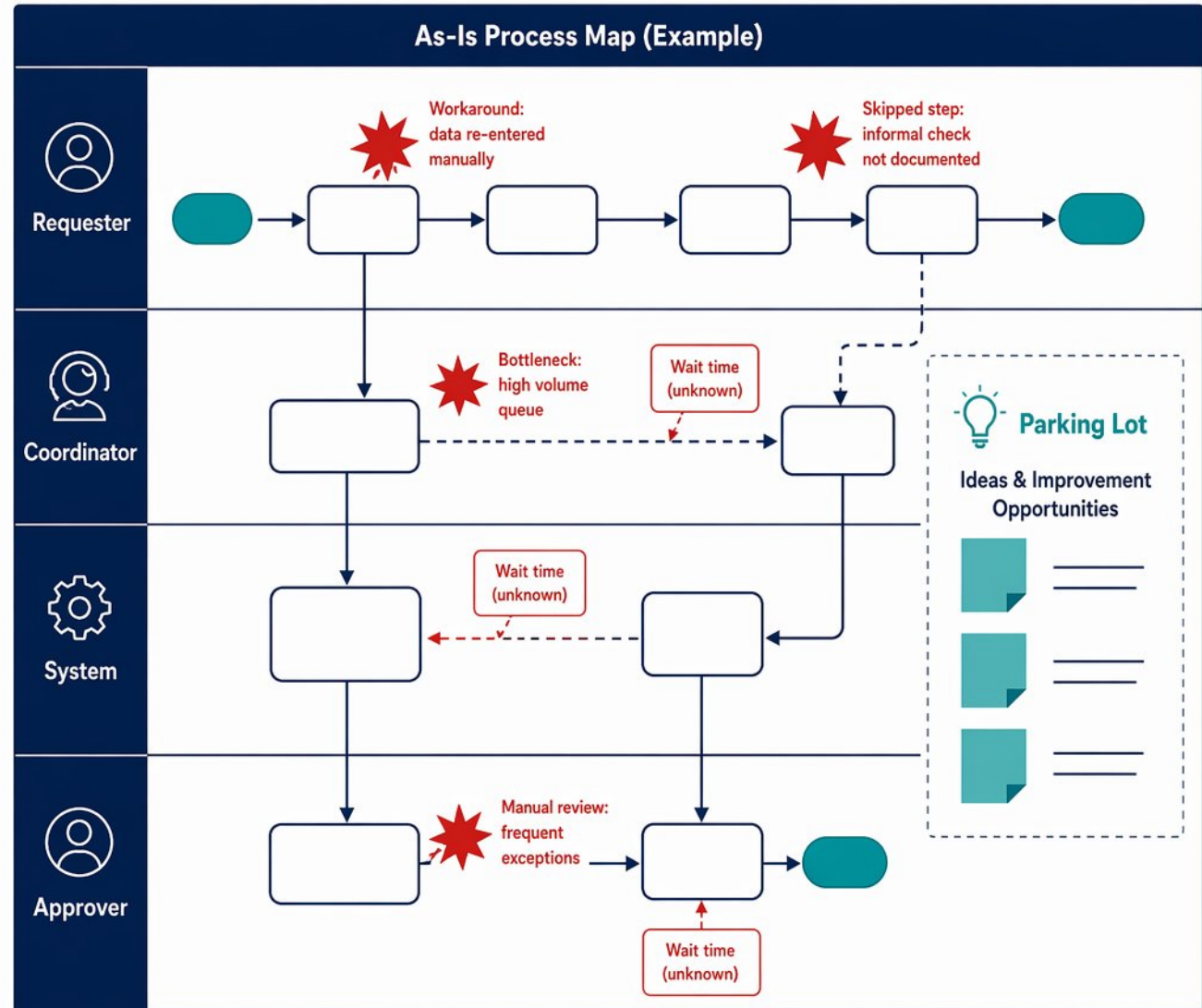
- Document roles, systems, cycle time, wait time, volumes, and exception frequency alongside the flow



- Label pain points and bottlenecks with burst symbols, red markers, or annotation boxes



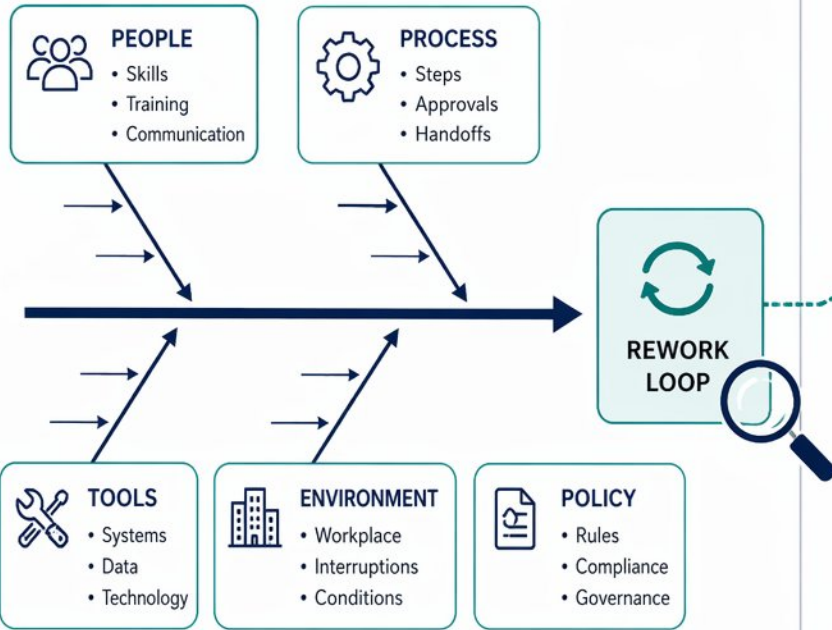
- Validate the map through a structured walkthrough with participants to confirm accuracy and build consensus



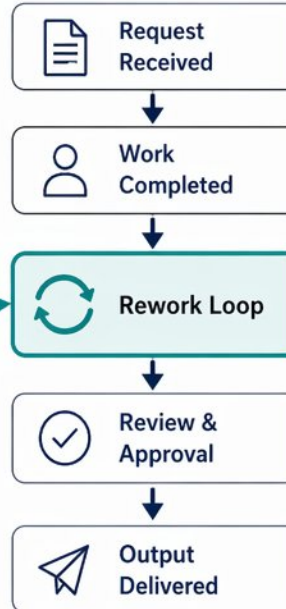
Analyzing the Process for Improvement Opportunities



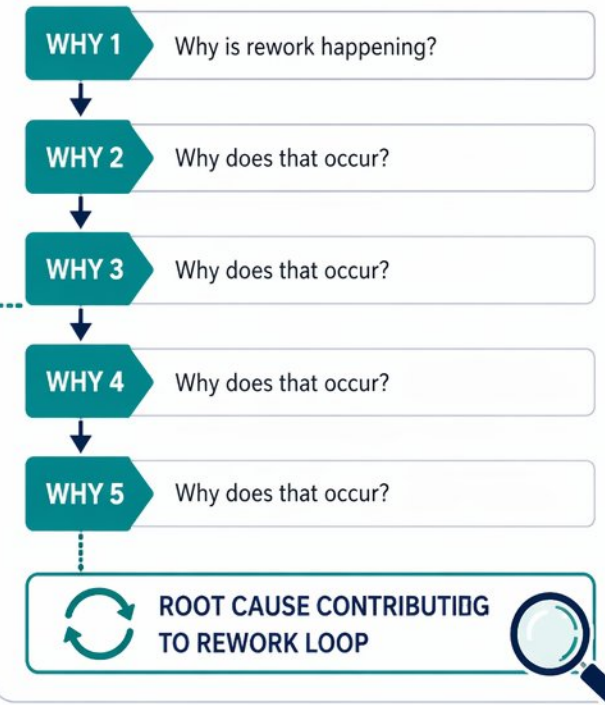
FISHBONE: CATEGORIZE ROOT CAUSES



PROCESS SNIPPET



5 WHYS: DRILL INTO THE PAIN POINT



- **Identify waste:** delays, rework, handoffs, approvals, duplication, waiting — each visible on the map



- **Use 5 Whys** to drill into pain points; use fishbone to categorize causes (people, process, tools, environment, policy)



- Analyze cycle time, wait time, and first-pass yield to quantify friction



- Prioritize with an effort-impact grid: quick wins, strategic projects, low-value distractions

Designing and Documenting the To-Be Process



- Eliminate unnecessary steps, automate routine decisions, and reduce handoffs in the redesigned workflow



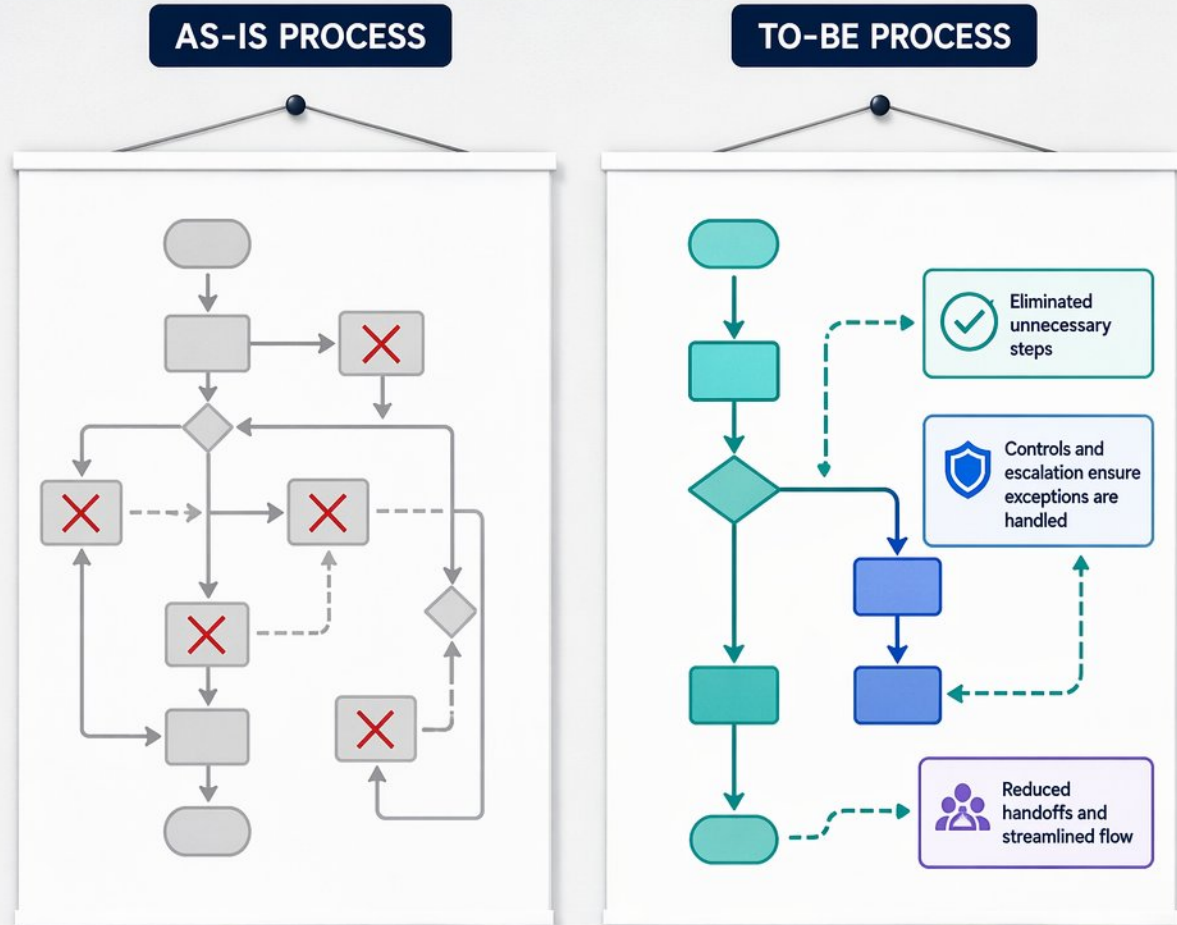
- Incorporate controls, handoffs, and escalation paths so the new process handles exceptions gracefully



- Compare as-is and to-be maps visually: side-by-side layouts, color-coded differences, and rationale callouts



- Define success metrics and assign a named process owner accountable for outcomes and performance reviews





Sustaining and Governing Process Maps



- Assign a named owner for every map; review quarterly (high-change) or annually (stable)



- Embed maps into onboarding, training, and daily operations as the single source of truth



- Use maps as evidence for compliance (ISO 9001, SOC 2) and to detect process drift



- Common tools: Lucidchart, Miro, Visio for diagrams; Confluence, SharePoint, Notion for docs



Owner: Alex Morgan
Review: Quarterly
Version History



Owner: Jamie Patel
Review: Annually
Version History



Owner: Taylor Kim
Review: Quarterly
Version History



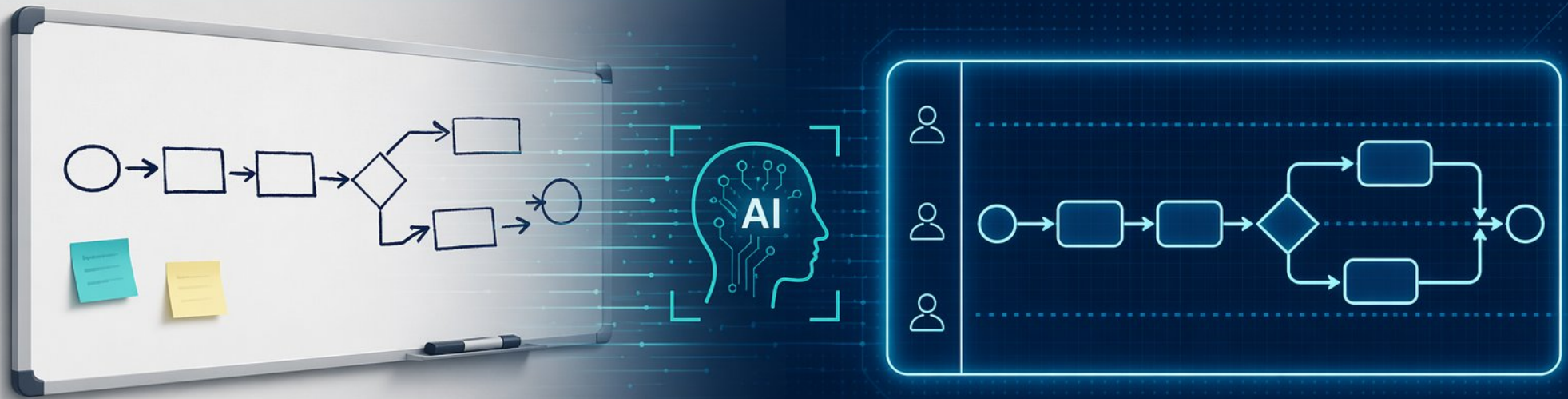
Owner: Morgan Lee
Review: Annually
Version History



Common Beginner Mistakes and How to Avoid Them



Tools and Technology for Process Mapping



- Match tool to purpose: Miro for workshops, Lucidchart/Visio for final diagrams, BPMN.io/Camunda for automation



- AI-assisted capture and process mining now complement manual mapping with data-driven validation



- Process mapping is human-described (qualitative); mining uses event logs to reconstruct reality automatically



- Practical rule: start with the tool your team already uses; a clear swimlane beats an unreadable BPMN diagram





Practical Application: Selecting Your First Mapping Project



- Choose a workflow: broken enough to matter, small enough to finish, cross-functional



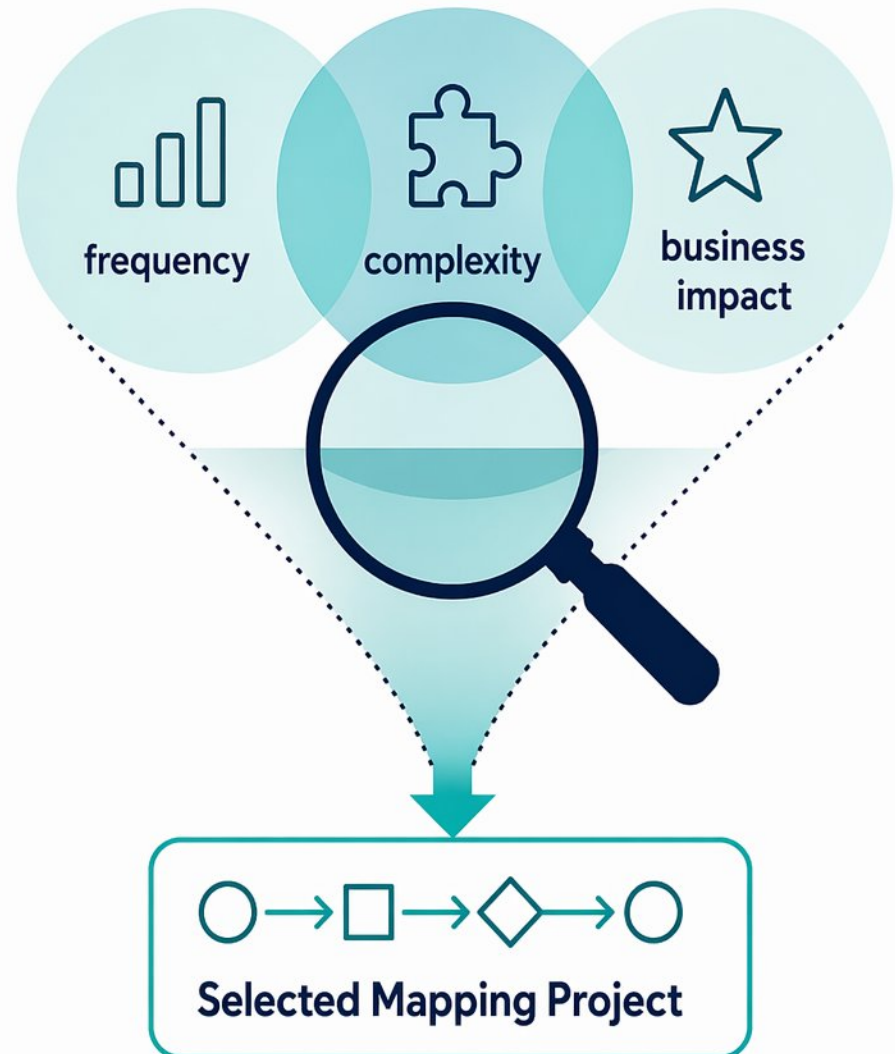
- Prioritize by frequency, complexity, and business impact



- Define scope: "Starts when [trigger], ends when [outcome]"



- Build a one-page charter: name, purpose, triggers, stakeholders, scope, success criteria



30-Day Action Plan After Training



Days 1-7: Select process, define scope, identify stakeholders, schedule workshop



Days 8-14: Run workshop, capture as-is map, validate, annotate pain points



Days 15-21: Analyze for waste, root-cause top 2-3 pain points, draft to-be process



Days 22-30: Validate to-be, define success metrics and owner, schedule first review



Key habit: Schedule a 30-minute review at day 30 — maps drift without review



Resources for Continued Learning and Certification



ABPMP



CBPA
(foundational)



CBPP
(4+ years
experience)



OMG BPM pathway



Fundamental



Intermediate



Advanced
exams focused on BPMN



BPMInstitute.org



Specialist certificates
in BPM



OpEx



Business Architecture



and AI



- Join a local ABPMP chapter, study group, and map one real process per quarter

Course Summary and Key Takeaways



- **Process mapping is diagnostic:** it reveals friction, not fixes. Real work begins after the map exists.



- **Five core skills:** scope, facilitate, document as-is, analyze for improvement, design to-be.



- **The one rule:** map what IS, not what should be. A fantasy map is worse than no map.



- **Governance imperative:** named owner, review cadence, and daily use prevent maps from becoming stale memories.



- **Your next step:** pick one process and map it within 30 days. Doing is the fastest way to learn.



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