Guide to Process Mapping and Redesign

*Feeling worn out at the end of the day? Does a day at the office seem chaotic and on the verge of disaster? Would an unexpected hiccup, such as a key staff member being out for the day, a computer glitch or a lab machine malfunction, cause the day to unravel?*

Process mapping is a simple Lean tool to help you and your team identify inefficient workflows or unnecessary variables in your daily work to head off disorganized and potentially disastrous situations before they arise. Process mapping can be accomplished in six steps:

**Step One**:Pick a specific process or workflow to analyze and improve. Keep your choice manageable. For example, you may want to analyze patient check-in, lab report review and follow up, or coding and billing workflow.

**Step Two**: Select a few people for a “task-oriented work group,” which should include someone from each function in the workflow.

**Step Three**: Detail all the steps with a map of the current workflow on a flip chart or white board with sticky notes. Think about decision points, authorizations required to proceed, location changes for patients or staff, handoffs of responsibility, equipment required, communication among staff about progress, etc.

**Step Four**: Look for steps in the workflow map that are unnecessary and could be eliminated. In the language of Lean, eliminate any steps that do not add value to the patient. Review the map with the following questions in mind: “Why are we doing this? What can we do differently to improve efficiency? Who can or should be doing this part of the process? Would a protocol or standing orders help?”

**Step Five**: Map the process with modifications and test it on a small scale for usability and refinement. Ideally, the work group has selected metrics to determine if the new workflow is actually better (and by how much) than the original. See examples of process maps below and here [Note for Klick: link to Lean process maps].

**Step Six**: Roll out the new process to the entire office.

*Select the next process for analysis and repeat the six steps!*

***Figure 1. Sample process map***

*Source: AMA. Practice transformation series: preparing your practice for change. 2015.*