



Macro-Level Process Flows that Drive Clarity and Shared Understanding

with Jay Ashford, PMP CBAP
August 19, 2022

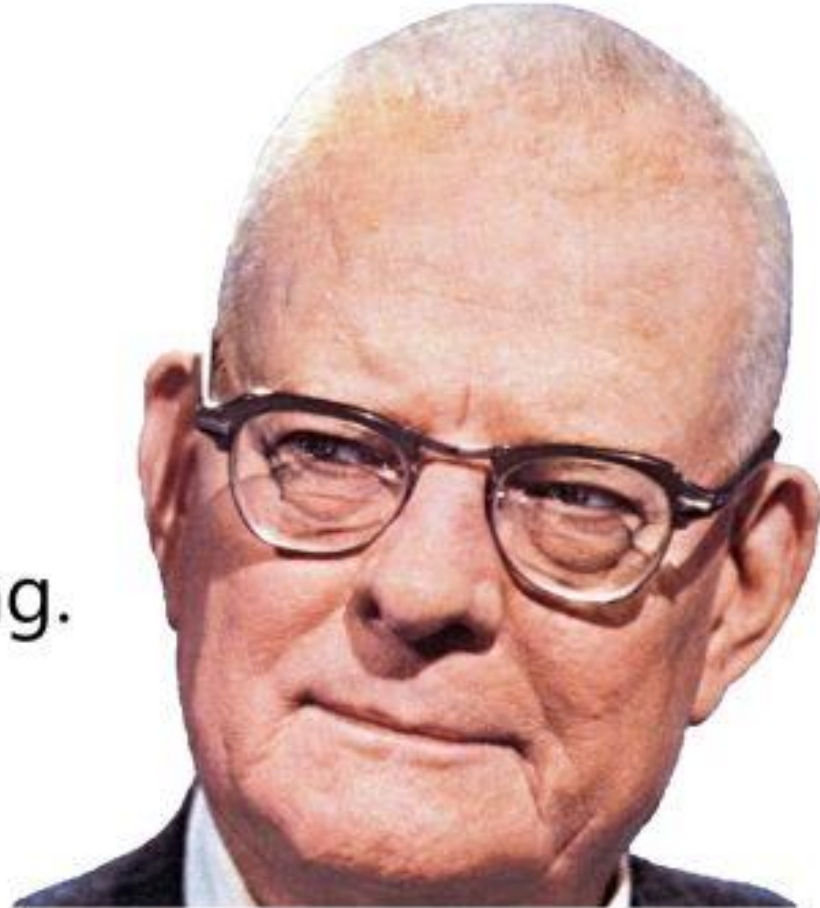
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First... A Quote

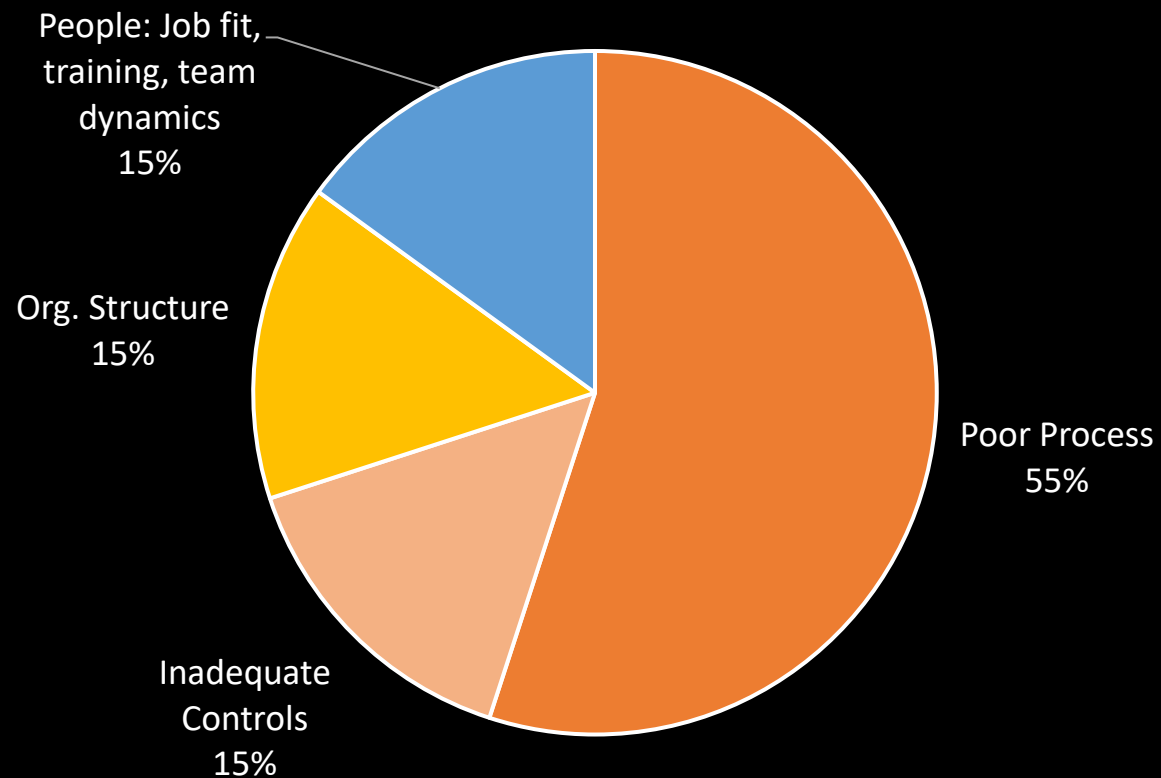
If you can't
describe what
you are doing
as a process,
you don't know
what you're doing.

William Edwards Deming

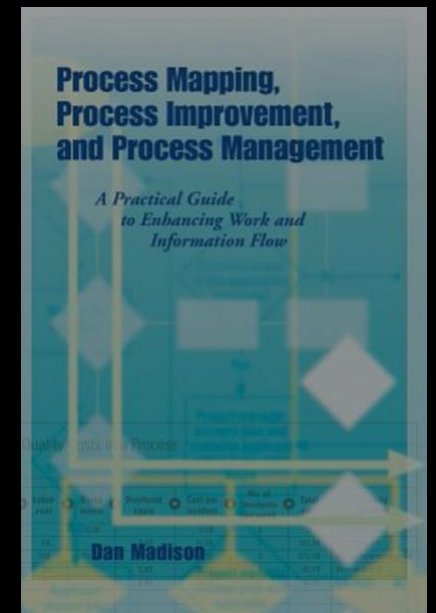


Second... A Chart

One Theory: Sources of Organizational Problems



Source:



What We'll Cover

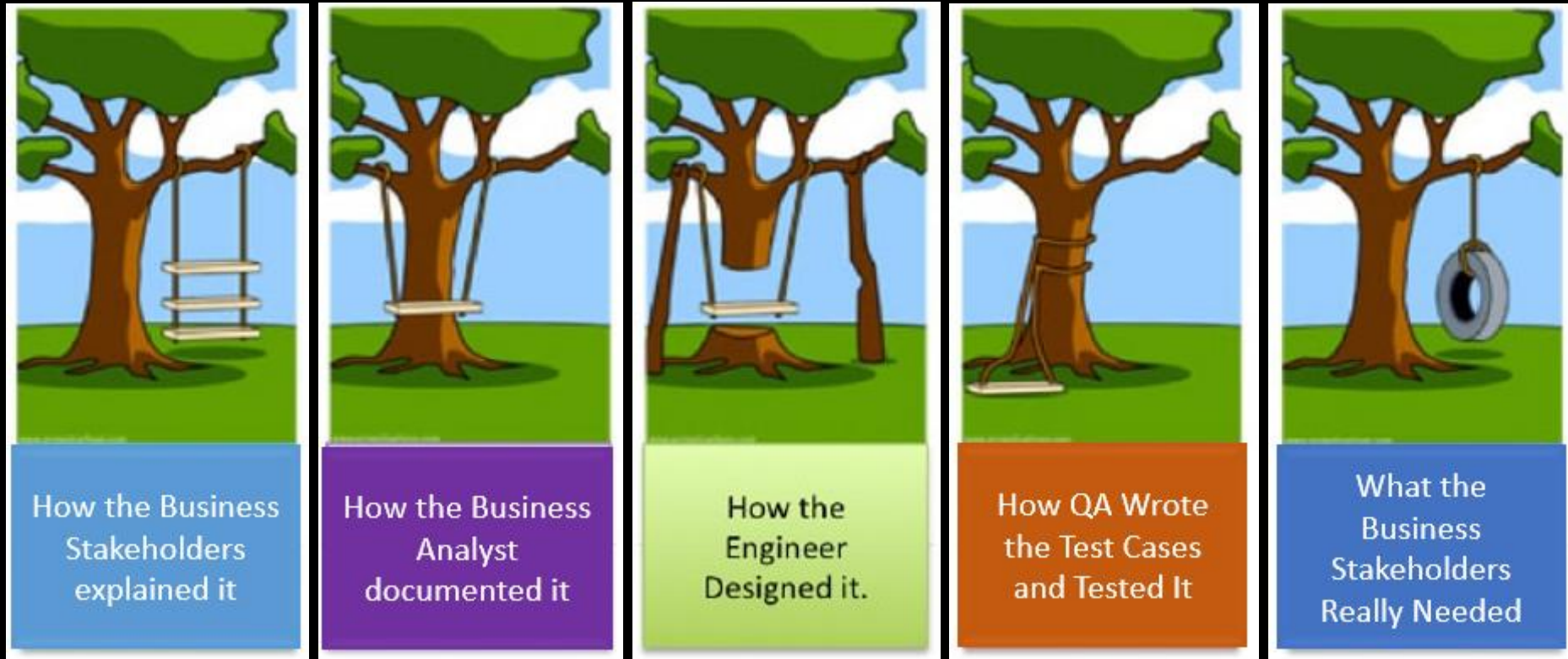


What We'll Cover

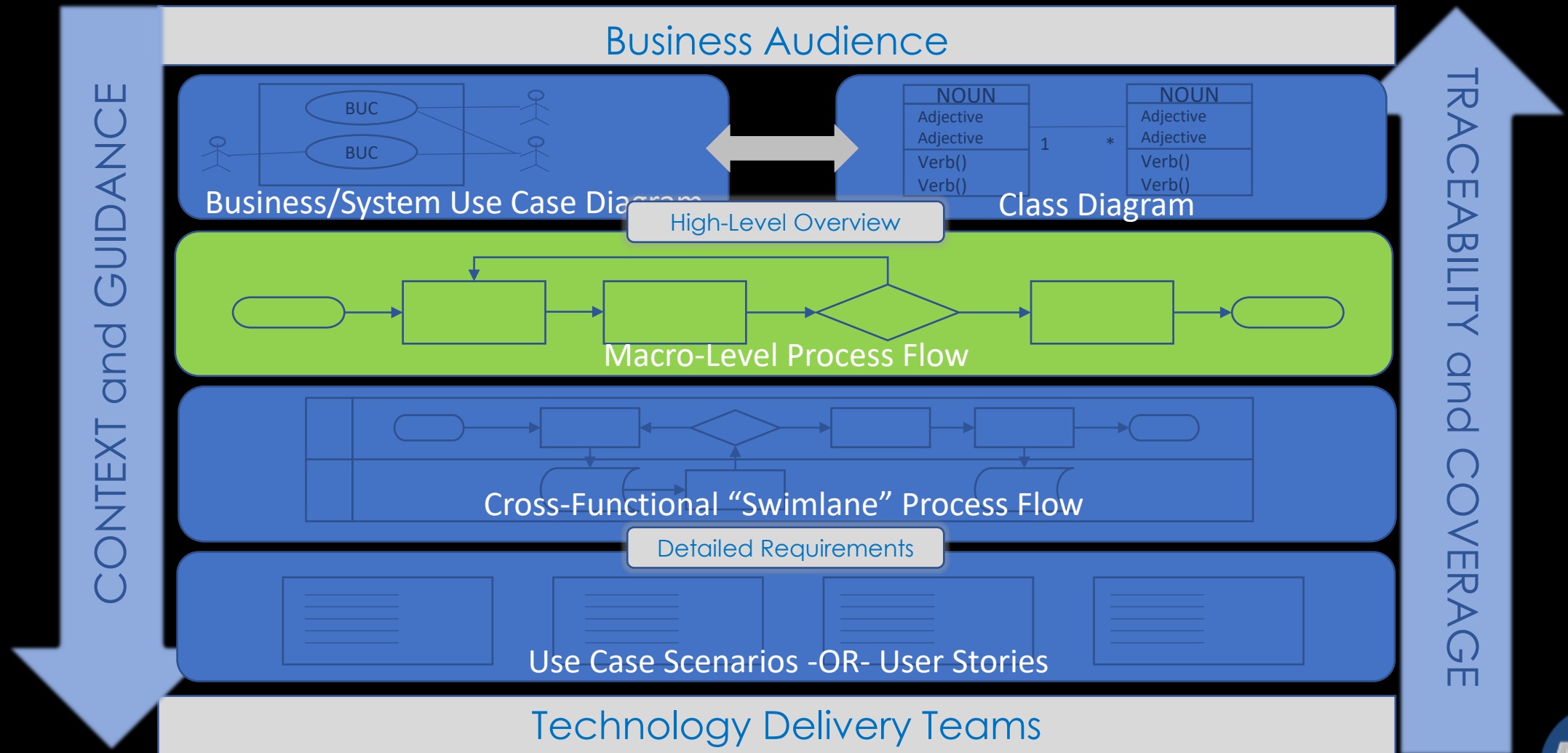
W5H

- **What:** What is a Macro-Level Process Flow?
- **Why:** Why is This Artifact Important?
- **How:** Key Elements and Best Practices
- **Who/When:** Who Creates, Reviews, Maintains
- **Where:** Tools You Can Use to Create, Store, Maintain

The Gulf of Evaluation



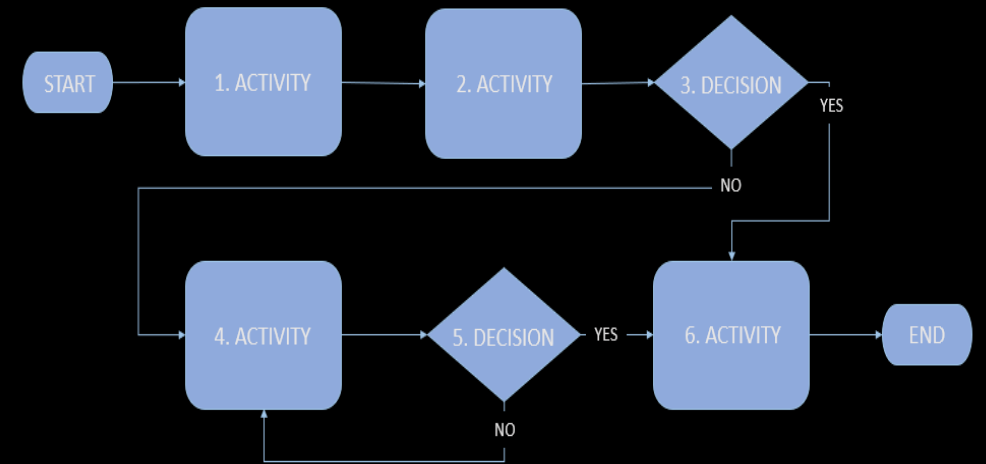
Bridging the Gulf



Macro-Level Process Flow

What Why How Who/When Where

- Decomposes Business Use Case Into Activity/Decision Steps
- Shows High-Level Value-Adding Steps
 - Between 2-12 Key Activities / Decisions
 - Should fit on 1 page
- Defines Process Scope / Boundaries
- Is Technology-Agnostic



Why Is This Important?

What **Why** How Who/When Where



Why Is This Important?

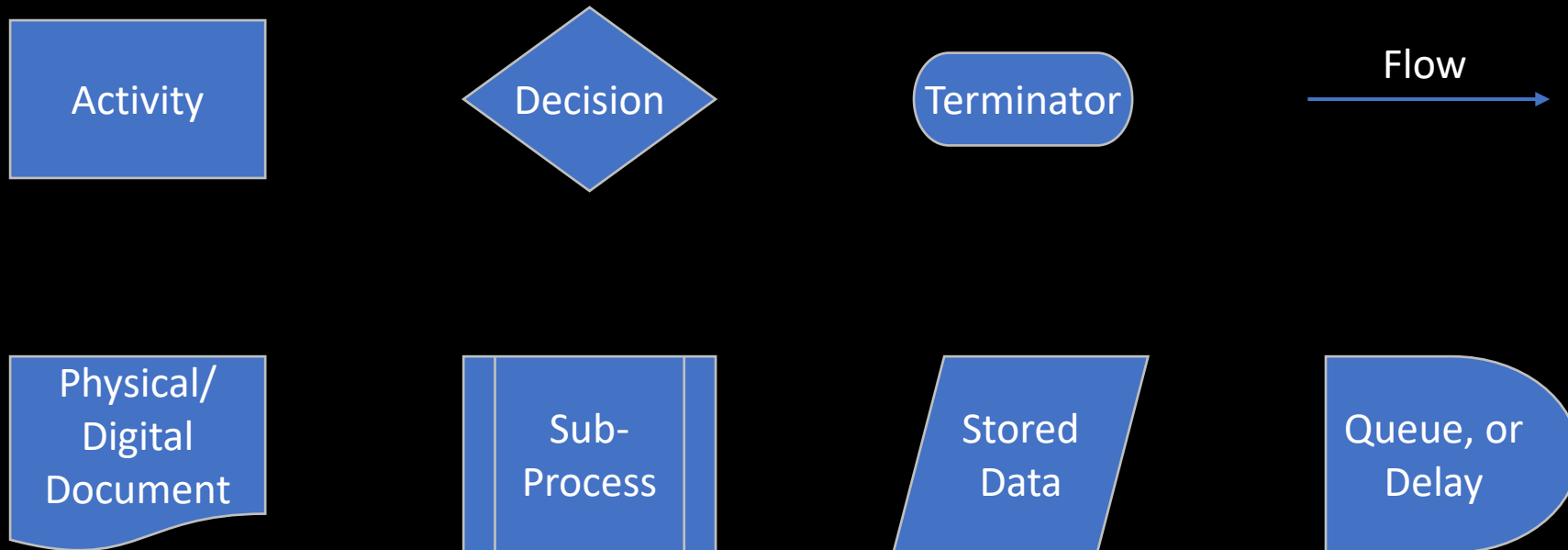
What **Why** How Who/When Where

- Clarity and Shared Understanding for Business Stakeholders
- Helpful for Onboarding and Training
- Useful for Compliance / Regulatory Reviews
- Promotes a Process Mindset and Improves Performance
- Launch Point for Projects / Change Initiatives
 - Current-State to Future-State



Key Elements

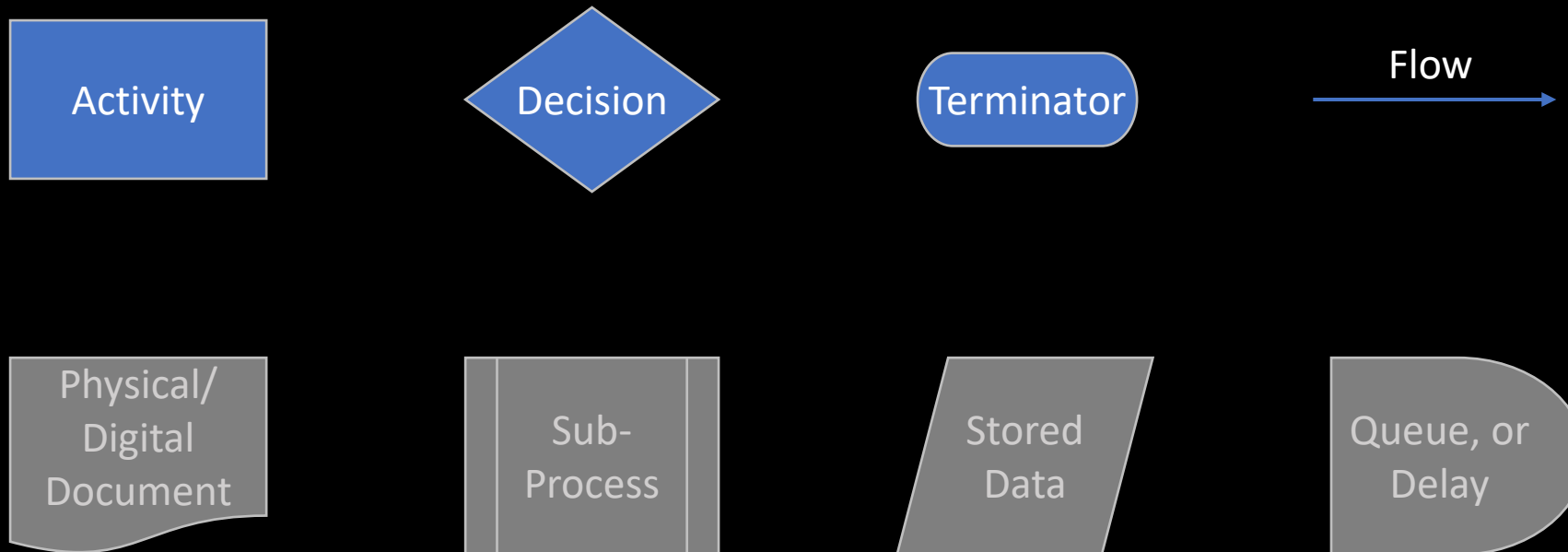
What Why **How** Who/When Where



8 Most Commonly-Used Shapes for Process Modeling (IMHO)

Key Elements

What Why **How** Who/When Where

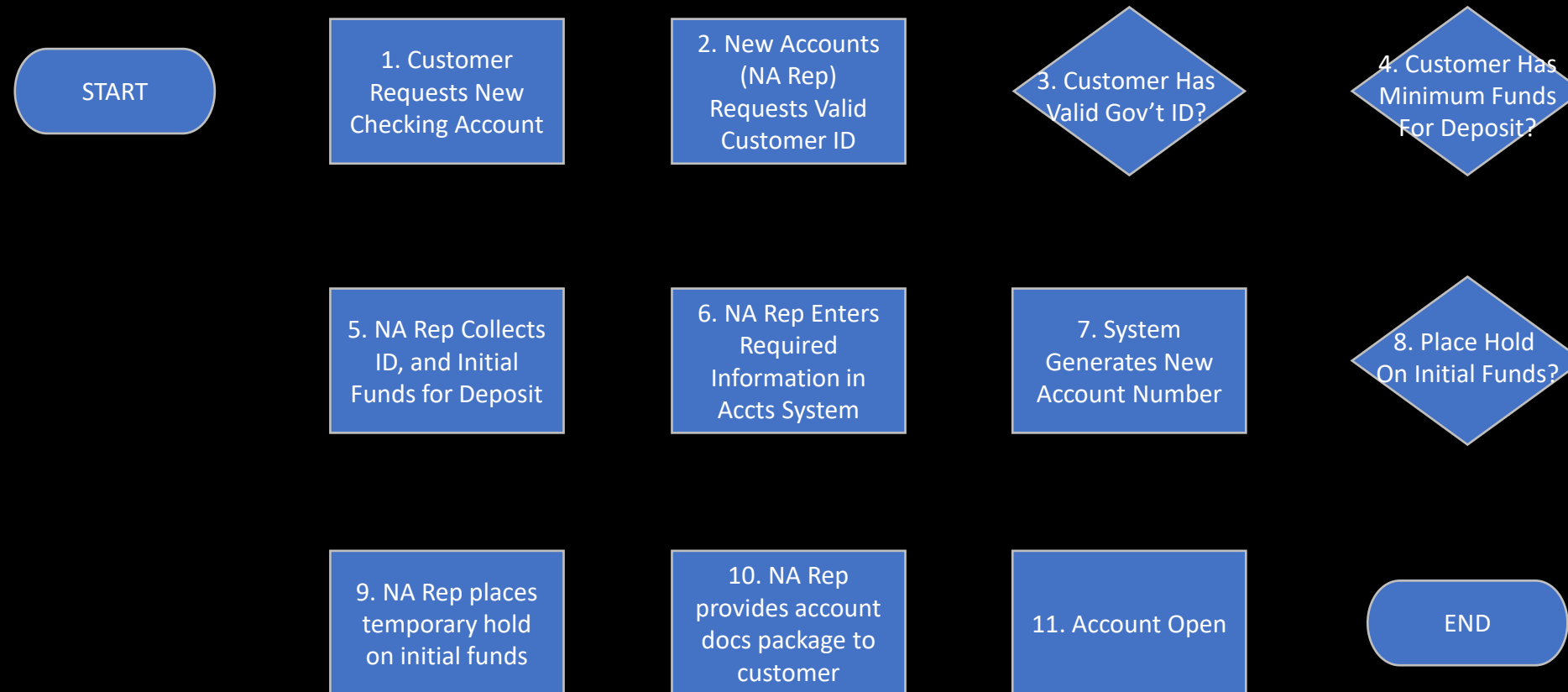


4 Most Commonly-Used Shapes for Macro-Level Flows (in blue)

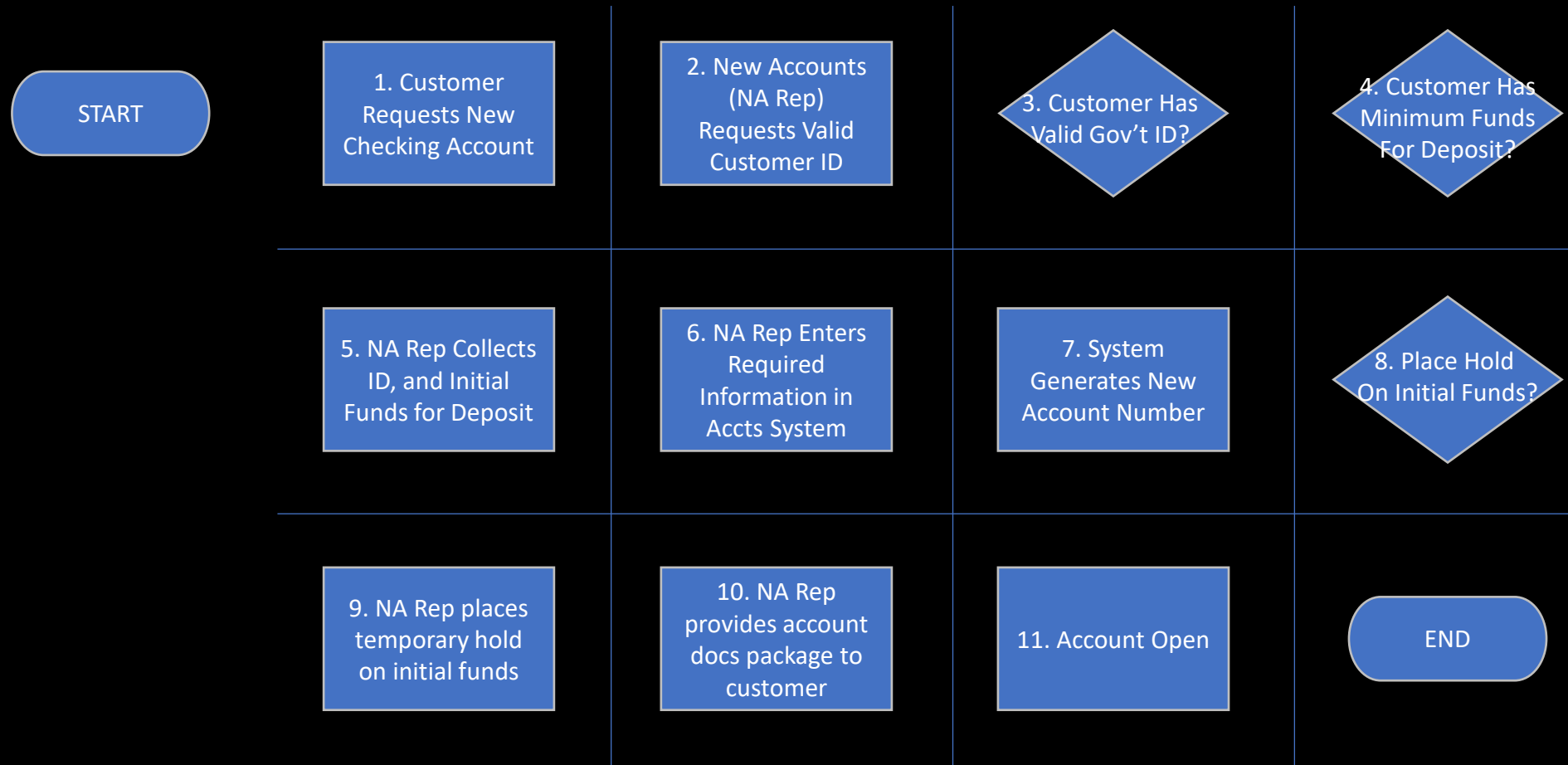
Best Practices

What Why **How** Who/When Where

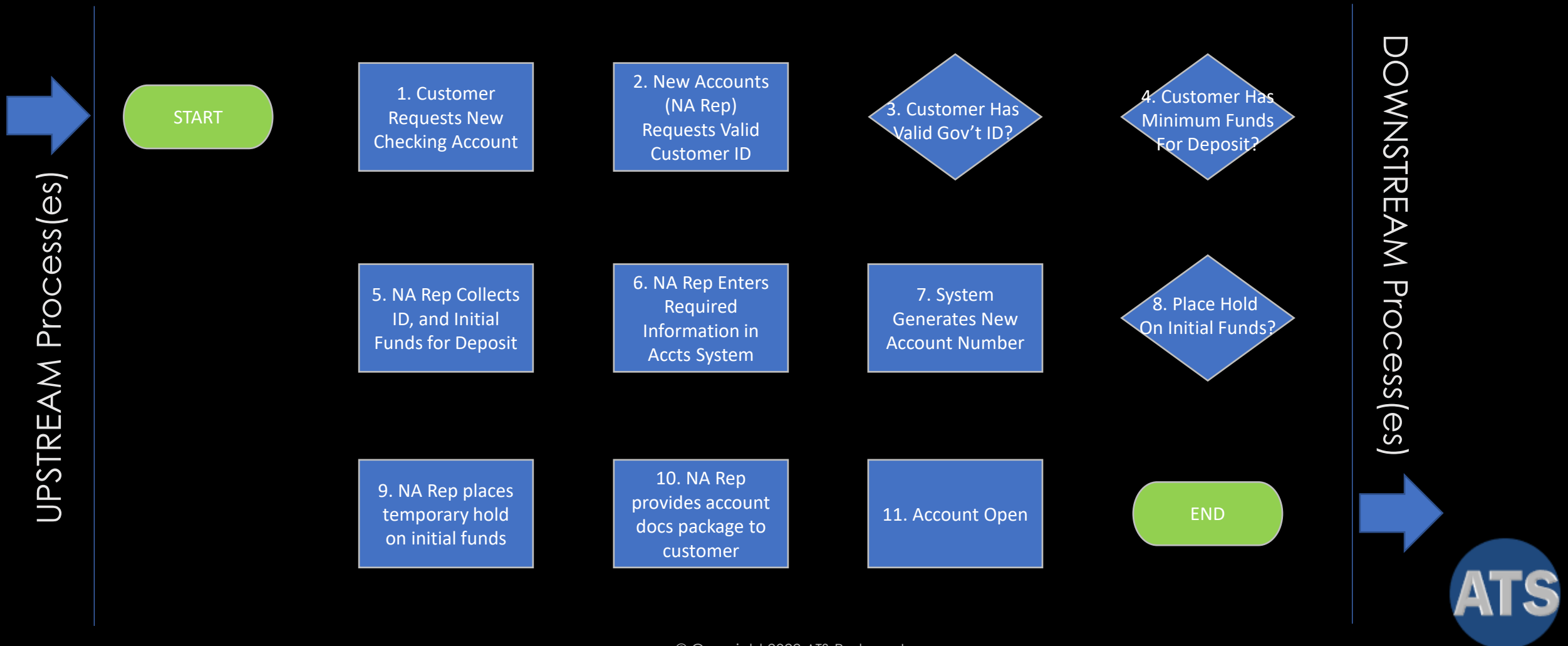
EXAMPLE: New Checking Account Opening Process at Fictitious Savings and Loan, N.A.



Best Practice: Shapes Neatly Arranged

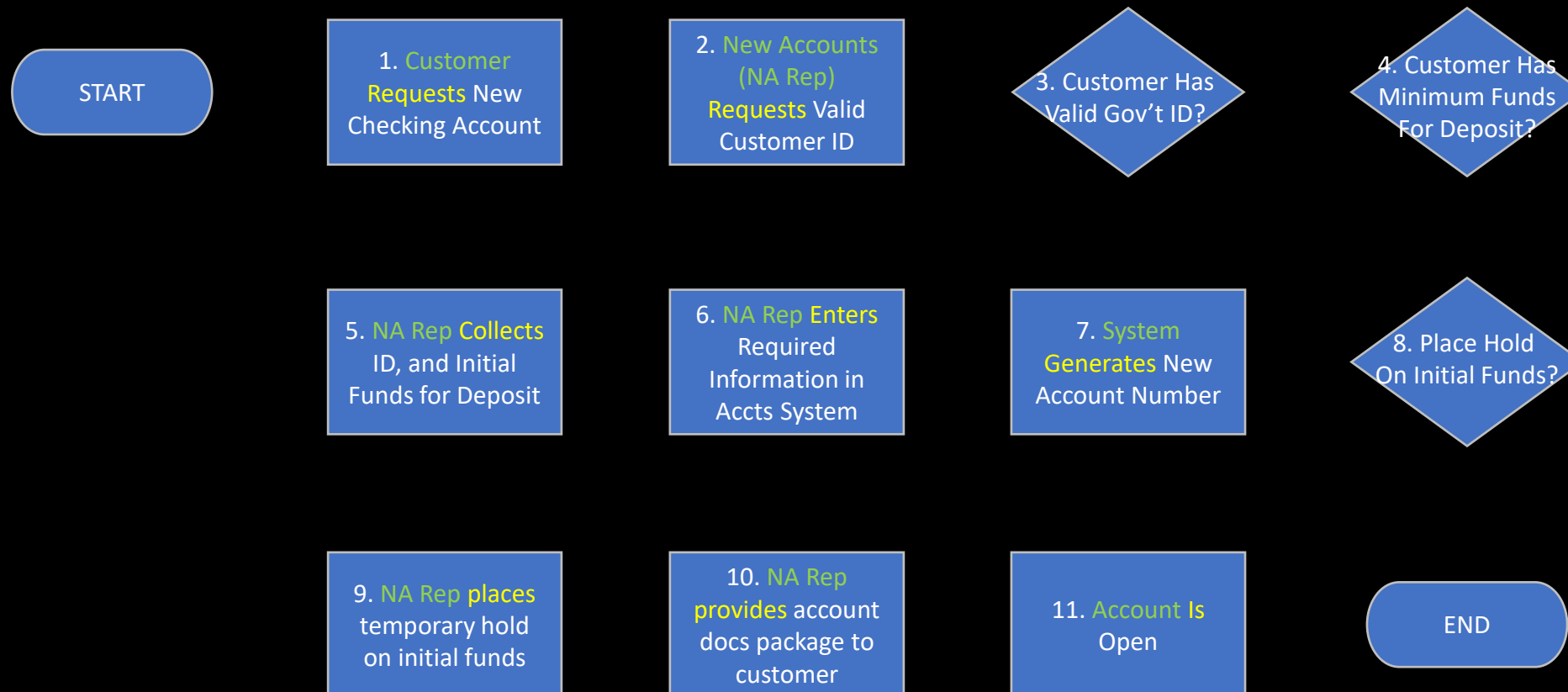


Best Practice: Start and End Terminators



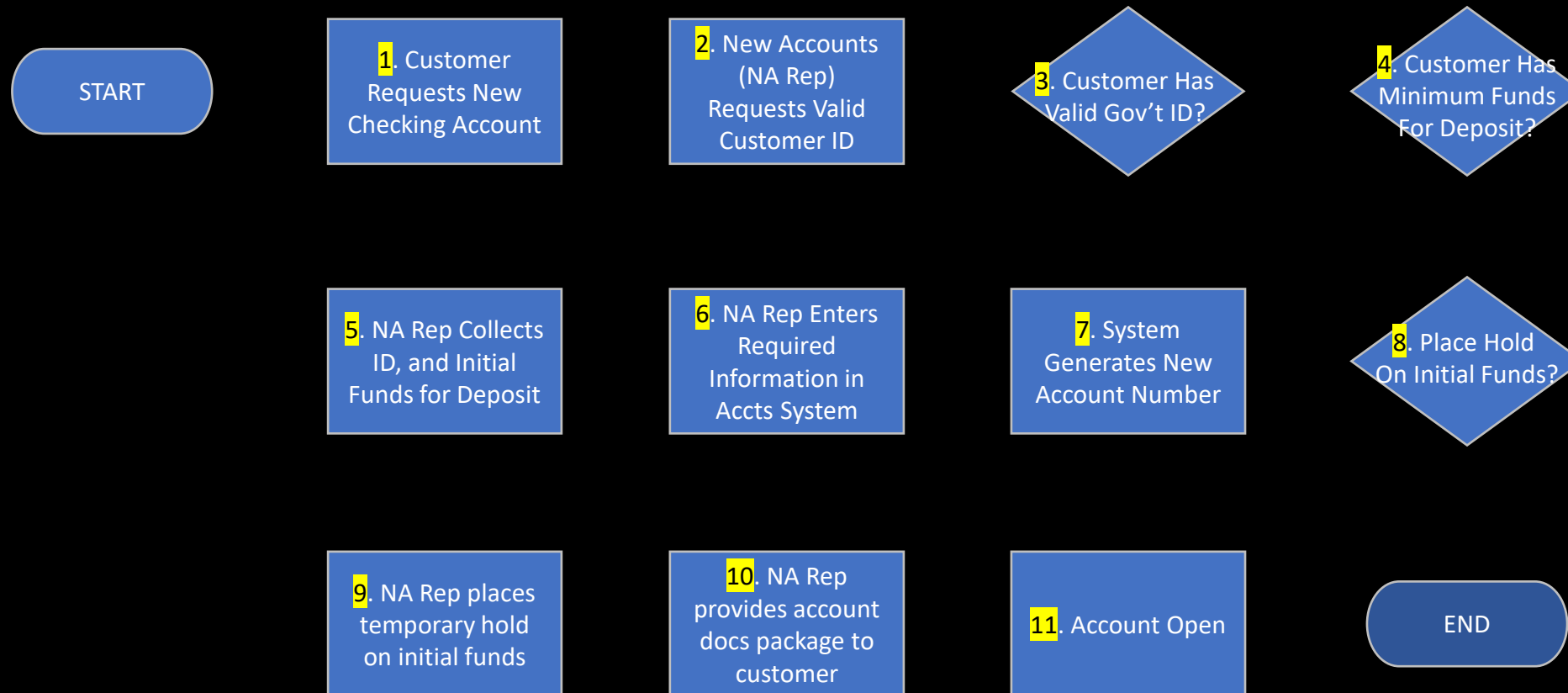
Best Practice: Activities in **Noun-Verb** Format

Who/What is Performing the Action / What Is the Action Being Performed



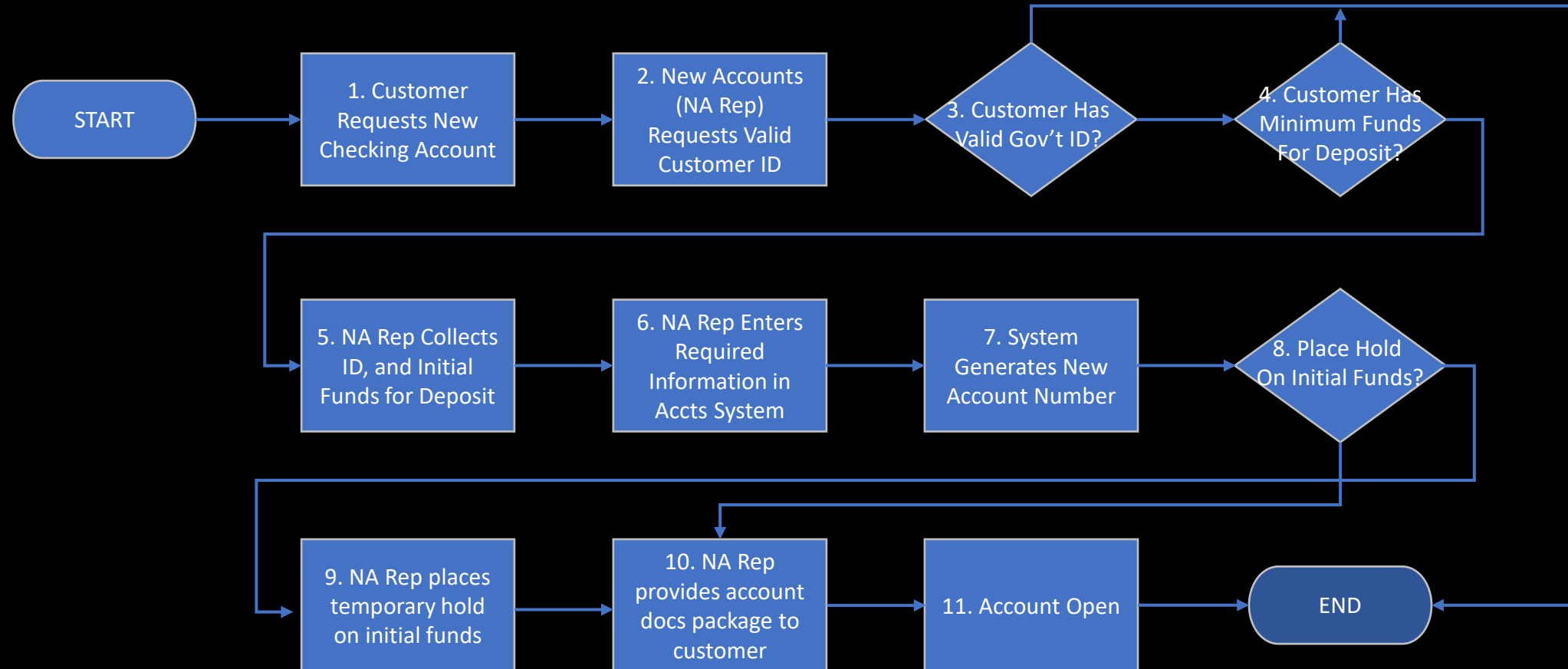
Best Practice: Number Your Shapes

(Not to indicate sequence necessarily, but rather for identification during reviews)



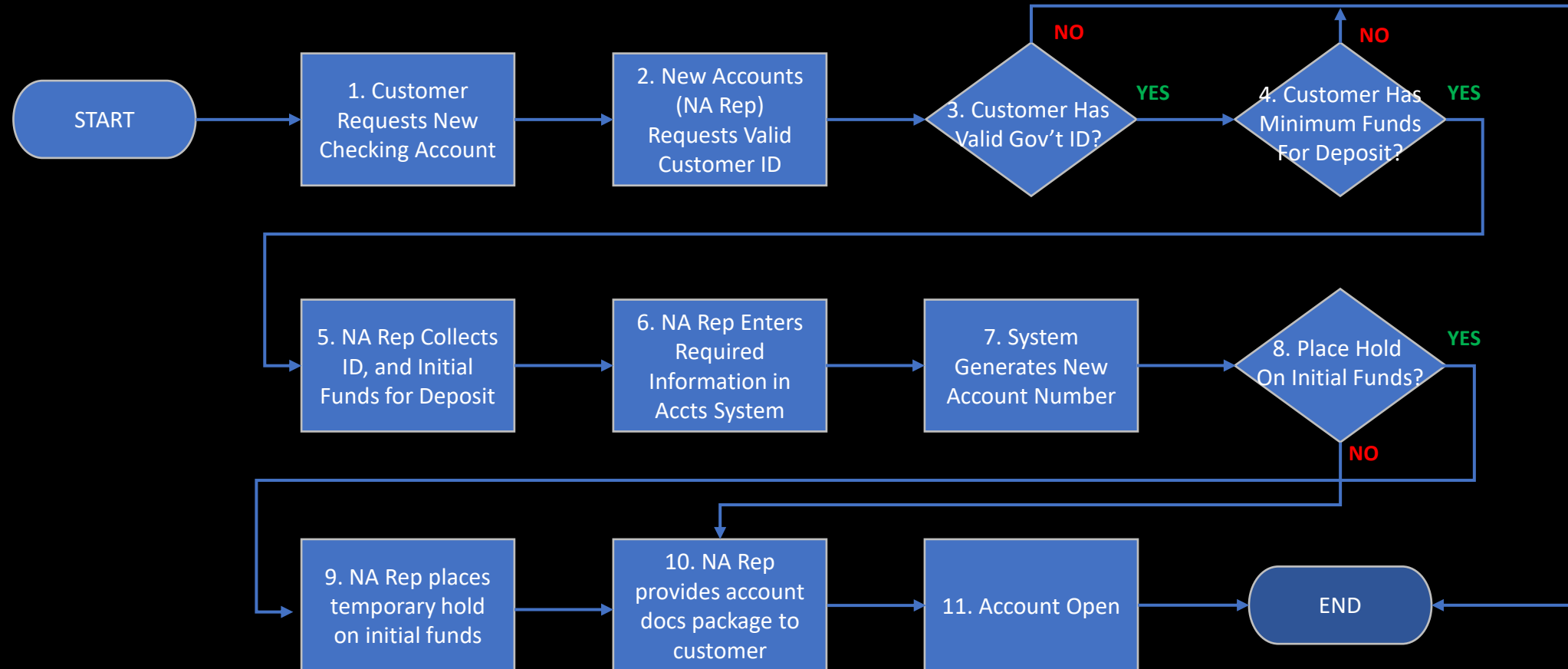
Best Practice: Keep Flow Arrows Clean

Once all shapes are finalized, **then** add flow arrows to indicate sequence.

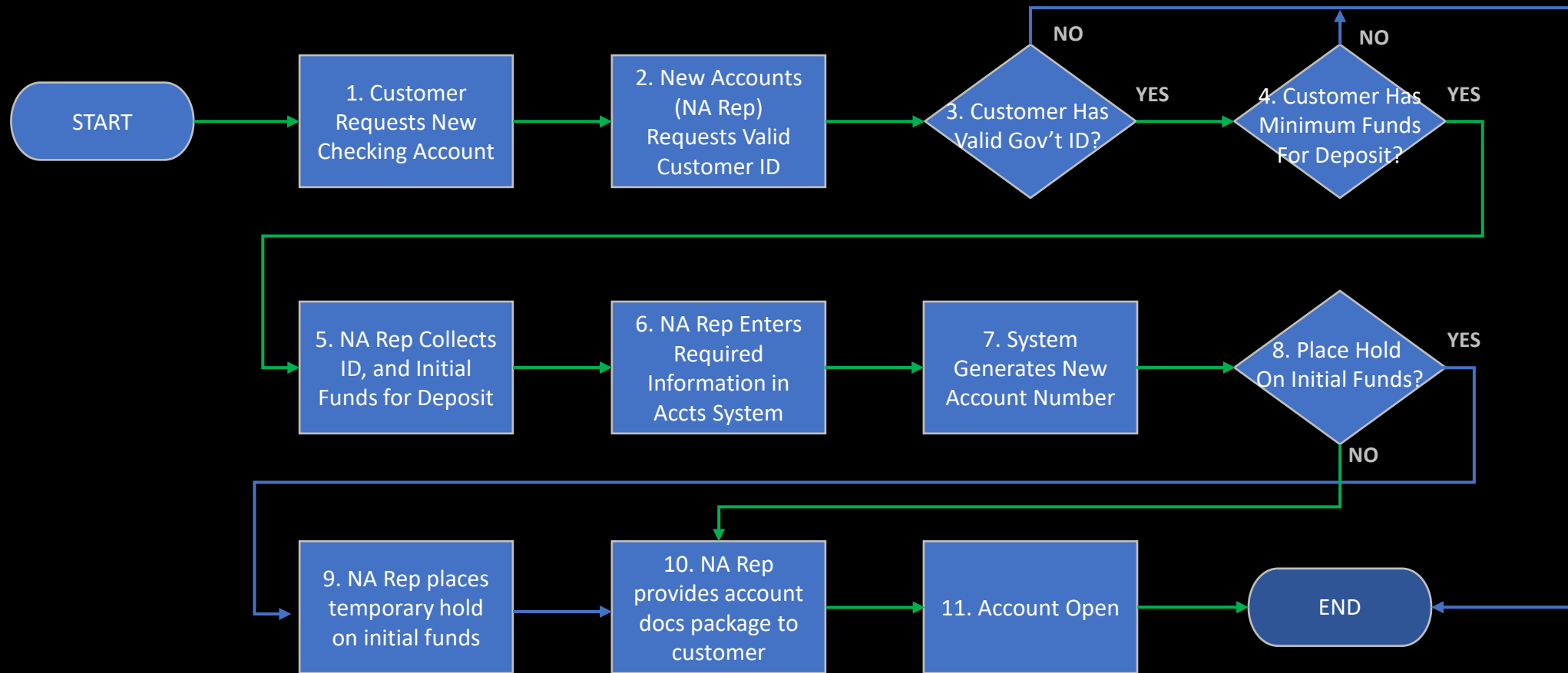


Best Practices: 2 Paths Clearly Labeled

Decision diamonds are typically an **exclusive** choice. Be sure to label both (all) exits from the diamond.

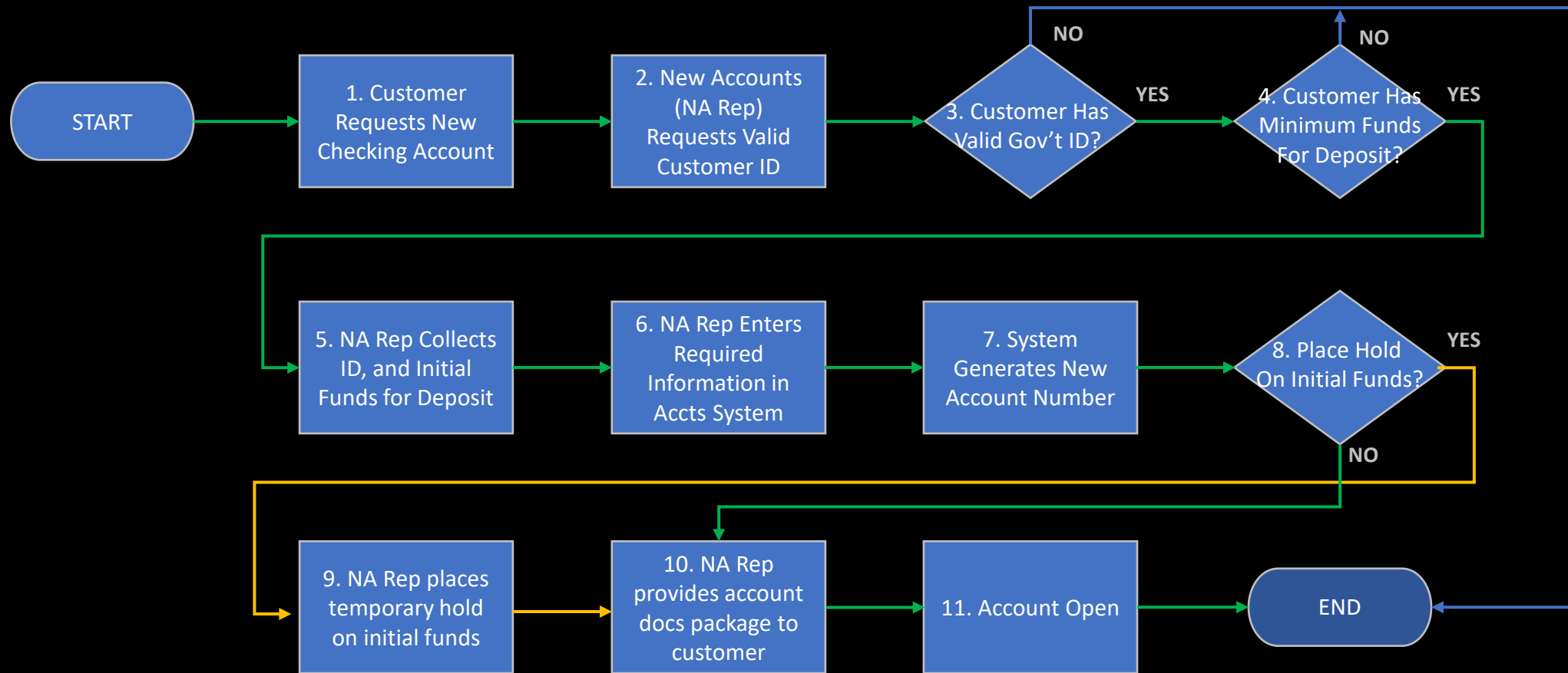


Best Practices: Happy Path, And Others



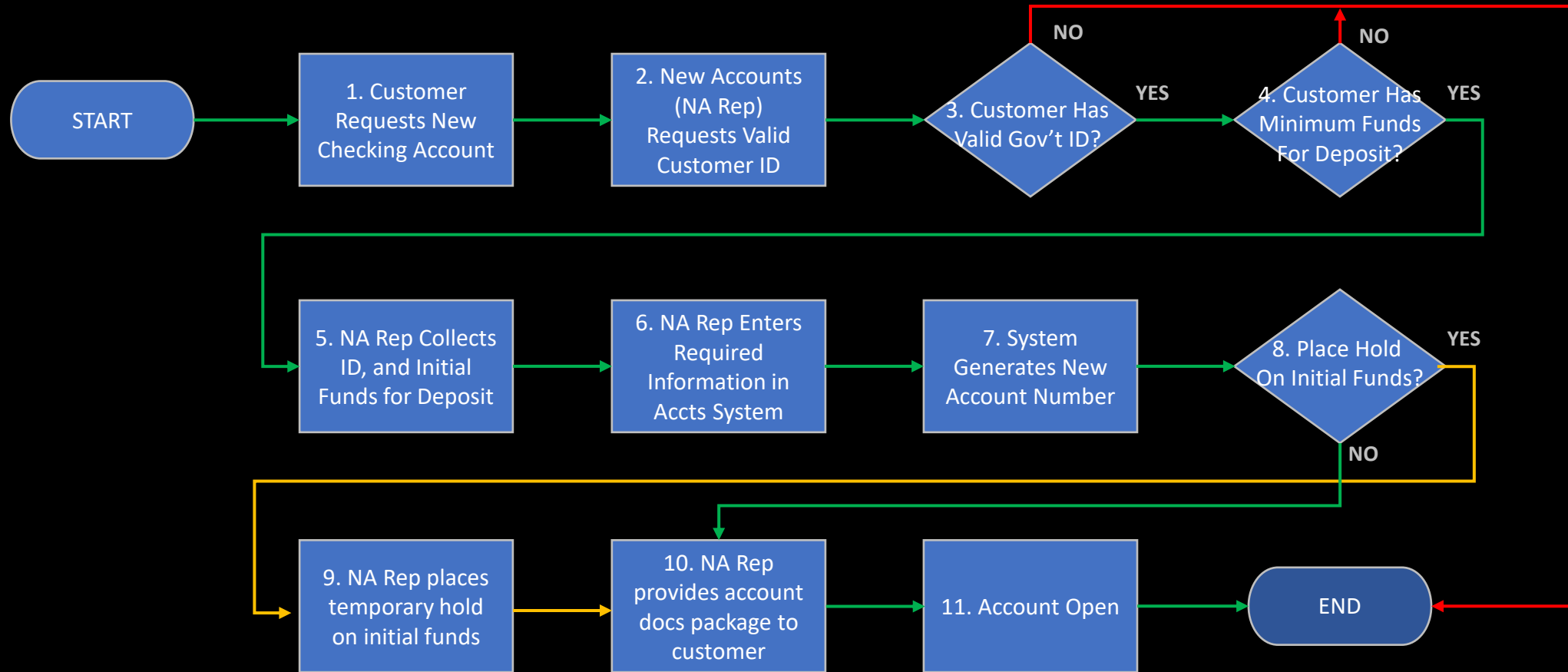
Primary Path (green): the simplest, most straightforward path through the process.

Best Practices: Happy Path, And Others



Alternate Path (yellow): A successful outcome but requires additional processing.

Best Practices: Happy Path, And Others

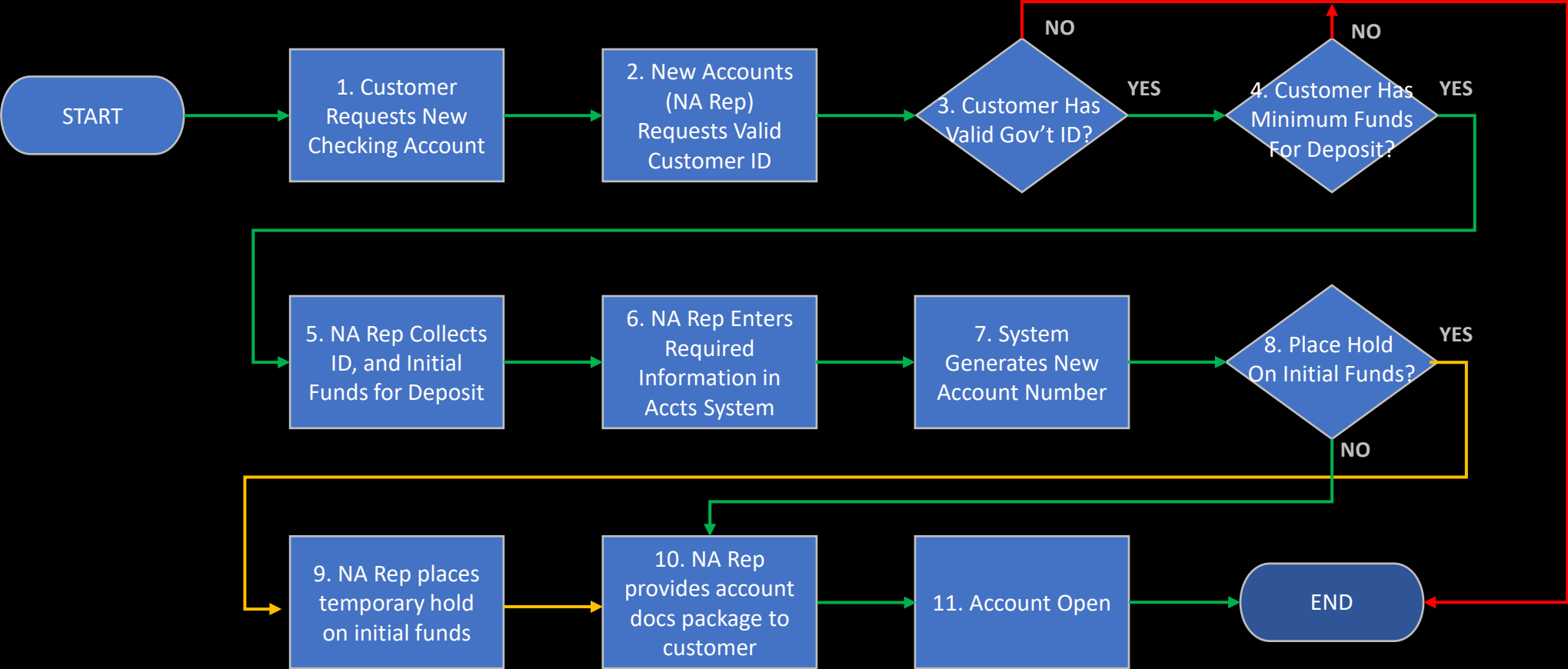


Exception Path (red): an unsuccessful outcome for the process.

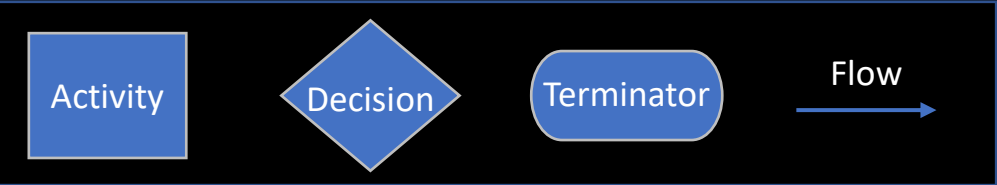
Primary Flow →
Alternate Flow →
Exception Flow →



Best Practices: Include a Legend of Shapes



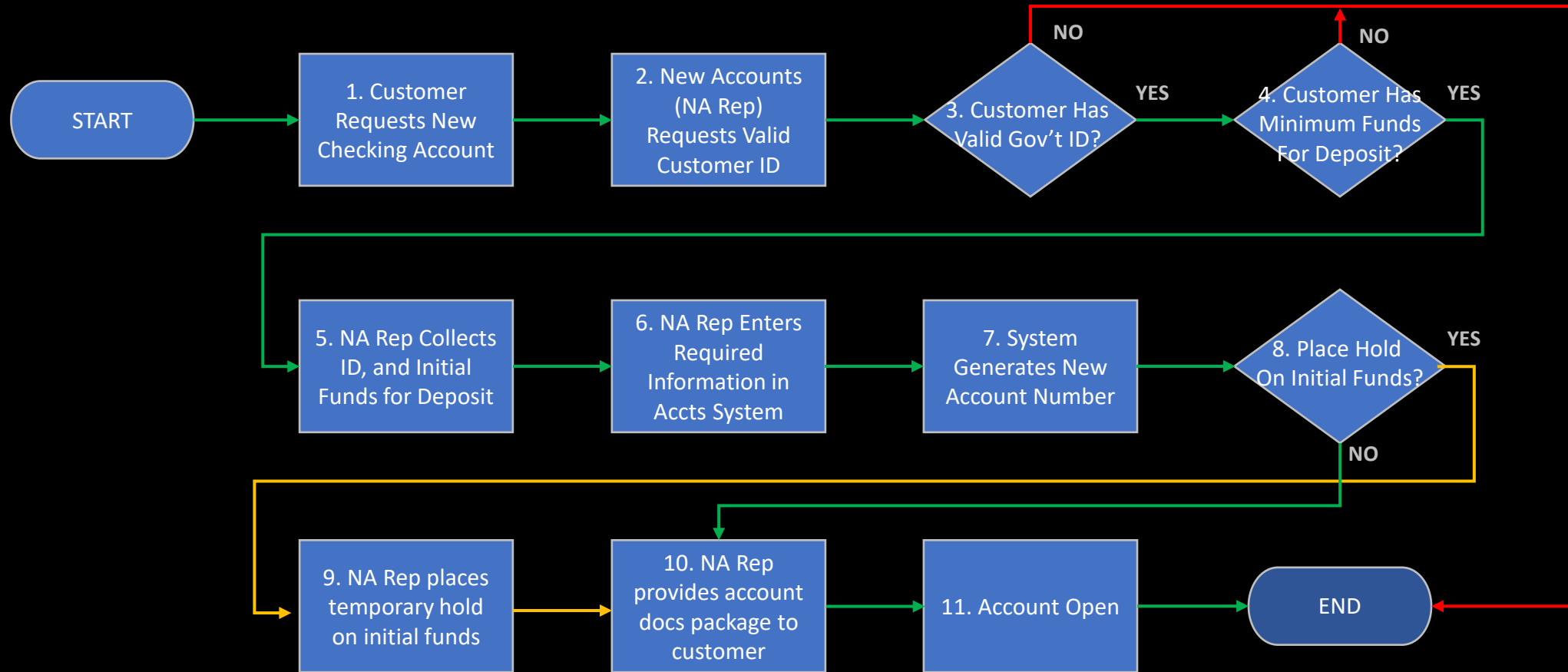
LEGEND



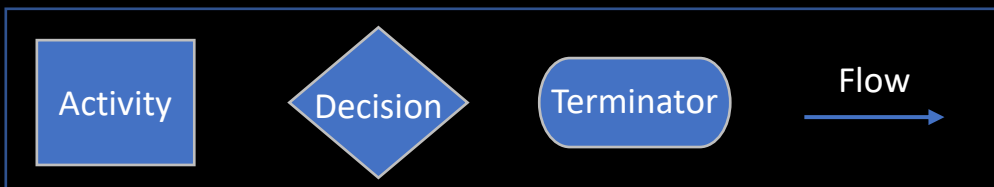
Best Practices: Title, Version, Review Info.

BUC 1 - MACRO-LEVEL PROCESS: Open New Checking Account




Version 1.0 Author: Nick G. Updated: 02-15-2020 Reviewed By: Pedro M, Joanna C. on 02-20-2020



LEGEND



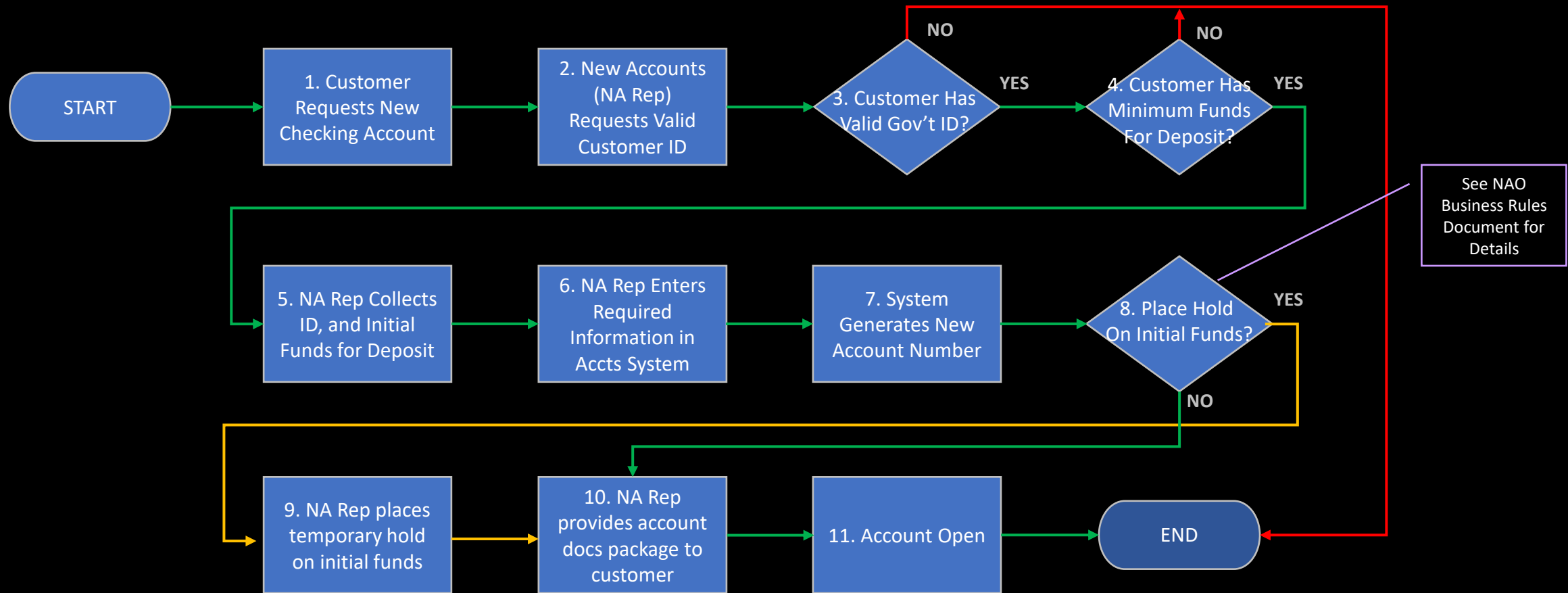
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Primary Flow 
Alternate Flow 
Exception Flow 

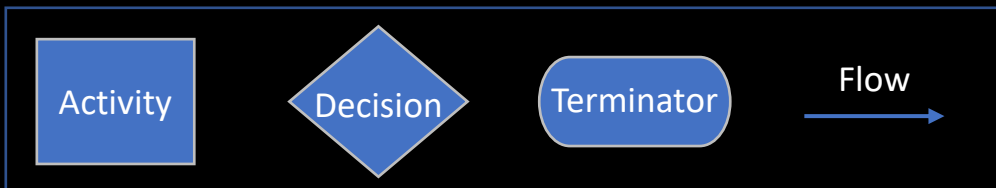


Optional: Commentary

Add a comment box to reference related info that's too detailed for the flow.



LEGEND



Primary Flow: Green arrow
Alternate Flow: Yellow arrow
Exception Flow: Red arrow

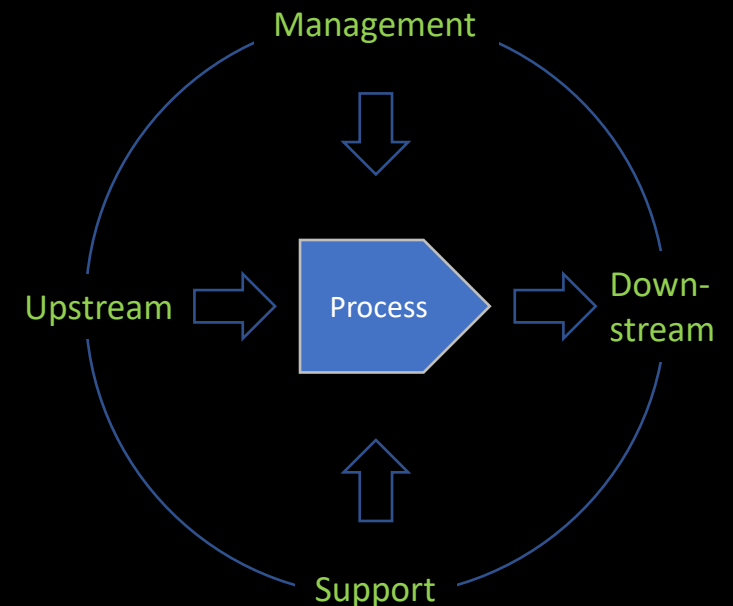
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Who Creates and Maintains?

What Why How **Who/When** Where

- **Creates:** Business Analyst / Process Analyst
 - or Business SME with Process Modeling skills
- **Reviews:** Business SMEs
 - Anyone Involved in the Modeled Process
 - Stakeholders Upstream / Downstream of the Process
 - Stakeholders Who Support the Process
 - Stakeholders Who Oversee/Manage the Process
- **Maintains:** Business Analyst, or Business SME
 - Schedule a Review quarterly / yearly



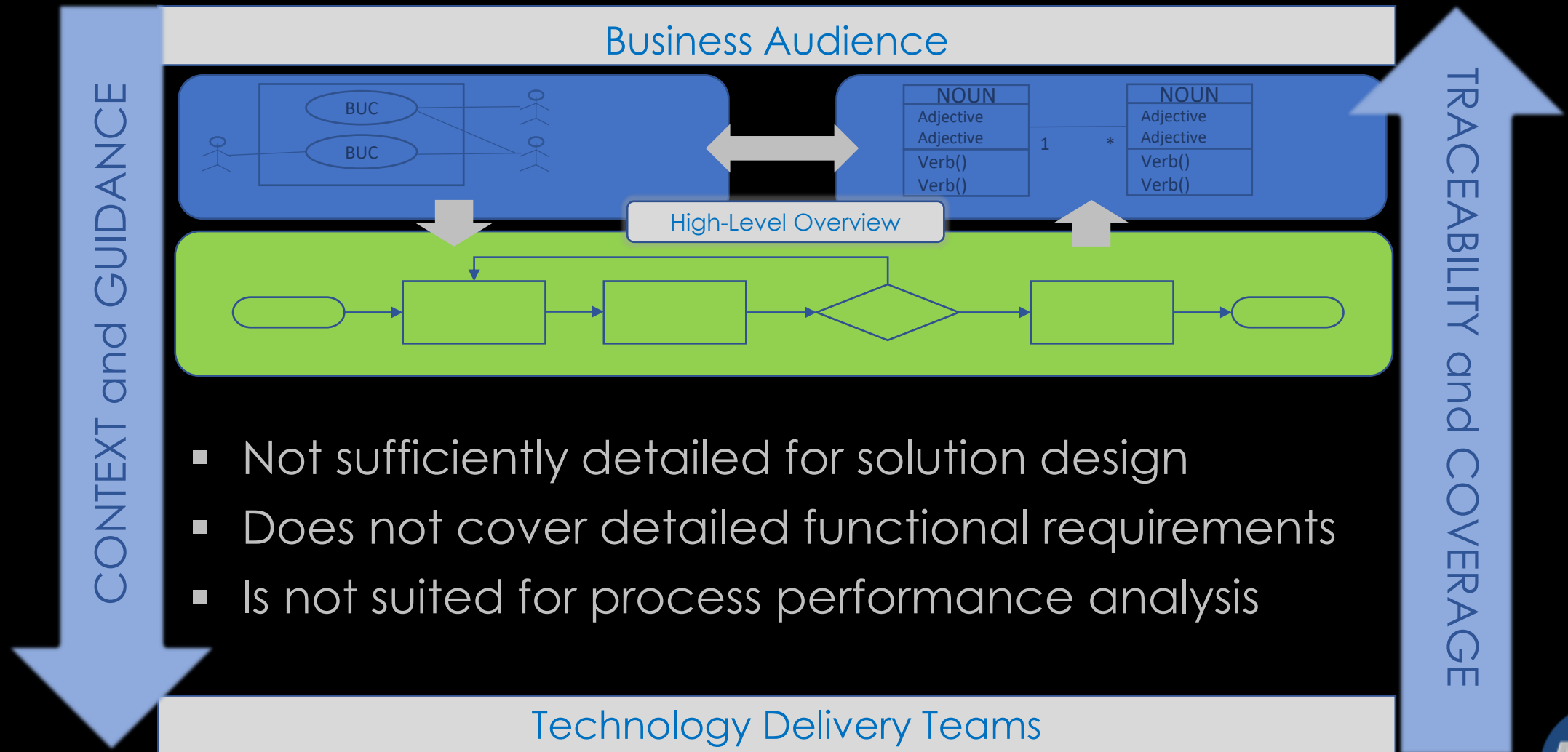
Tools You Can Use

What Why How Who/When **Where**

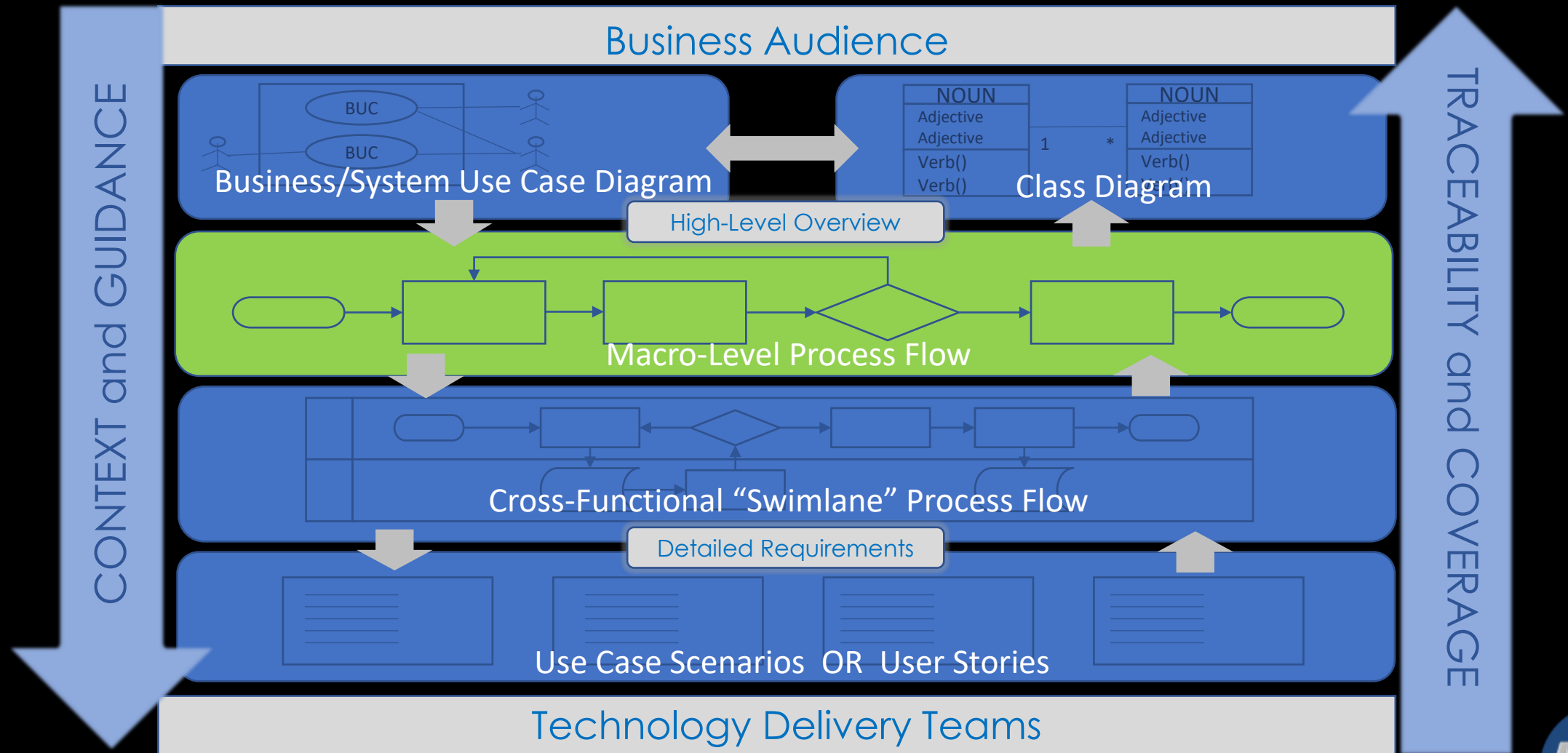
- Microsoft Visio – Standard / Professional (microsoft.com)
- LucidChart.com (Online - Subscription-based)
- Microsoft PowerPoint (office.microsoft.com)
- Google Slides (docs.google.com) – Free
- And many others... (Miro, Draw I/O)



Limitations of the Macro Flow



Hence the more detailed artifacts...



In Conclusion...



How the Business Stakeholders explained it



How the Business Analyst documented it
(macro-level flow and other artifacts)



How the Engineers Designed it



How QA Wrote the Test Cases and Tested It



What the Business Stakeholders Really Needed

Thank You...