

## Simplifying processes

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**“We've been cleaning up and simplifying how we do things. We're not at the point where we can pull a college student in and say, "Here's how you do this." Is it worth continuing to simplify, and if so, what suggestions do you have for pushing ahead?”**

There are real advantages to simplifying as much as possible so that someone close to entry level can do it. Recruiting gets easier as skill requirements drop. Getting closer to entry-level skills lowers payroll and makes it easier to swap more people in and out of the task. Figuring out how to map a process is a matter of getting together everyone who does a task and asking them to describe in detail how they do it.

Process mapping is the general term used to describe writing out the flow of how people conduct a task. Diagramming the steps taken to conduct a task makes things more visual and easier to understand. Anyone can participate in laying out a diagram, debating the order of steps and adjusting the process. In fact, the more participants, generally the better the outcome.

### Circle around

Start with large, blank pieces of paper. At the top of the page, give a name to the process you're about to map out. At the left, draw a circle, and write down the very first thing that happens. At the right, draw another circle, and write down the very last thing that happens. For example, if the process is handling a customer service inquiry, the first step is probably, customer calls in. The last step is most likely, customer says the concern is satisfactorily resolved.

Put circles in-between to identify each action that happens along the way. You may circle back from one step to an earlier step, if things aren't going right. For example, if a customer isn't clear about the problem, or a replacement isn't available, the customer service person may have to circle back to the customer to discuss alternate ways to solve the problem.

Once the flow chart is built, let it sit for a week. Then re-check for additions and corrections. Identify break-downs and build in additional steps to eliminate or resolve. Every exception gets mapped.

### Tracking results

Here's a good example of how using process mapping reduced the need for skill and improved quality at the same time. A company regularly receives customer service calls. A specialist handles those calls and because of previous experience in operations, knows exactly how to handle those inquiries.

As sales start to pick up, so do customer service inquiries. Occasionally there are more calls than one skilled person can handle. Some customer calls get routed to voice mail and customers receive call backs later on. Most customers routed to voice mail do not rate the experience as satisfactory, even though their inquiry is eventually resolved.

The company decides to try process mapping. The skilled customer service agent writes down all the questions that come in every day and tracks frequency to find out which inquiries are the most repetitive. The agent scripts out what she says and does for each frequent call.

An unskilled customer service agent is selected and trained on the frequent questions and actions to resolve. The unskilled agent is put on the phones during busy call-in periods to handle low level questions and problems and make notes on more complex problems that need to be referred to the skilled agent.

People calling in get to talk to an agent, instead of voice mail. While not all customer needs are handled on the first call, callers are more confident that someone is attending to their needs and concerned about what's going on. Customer satisfaction goes up as the company controls its costs by putting in place a lower skilled, lower cost employee to help with incoming calls.

Looking for a good book? Try, "The Basics of Process Mapping" by Robert Damelio.

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