



Mapping processes, the value chain and customer journey

Templates and example framework



Tips and Tricks

1 Map the **current state** of the process first, not what it could be or should be... *you need to be clear on the problems before you can define the right solution!*

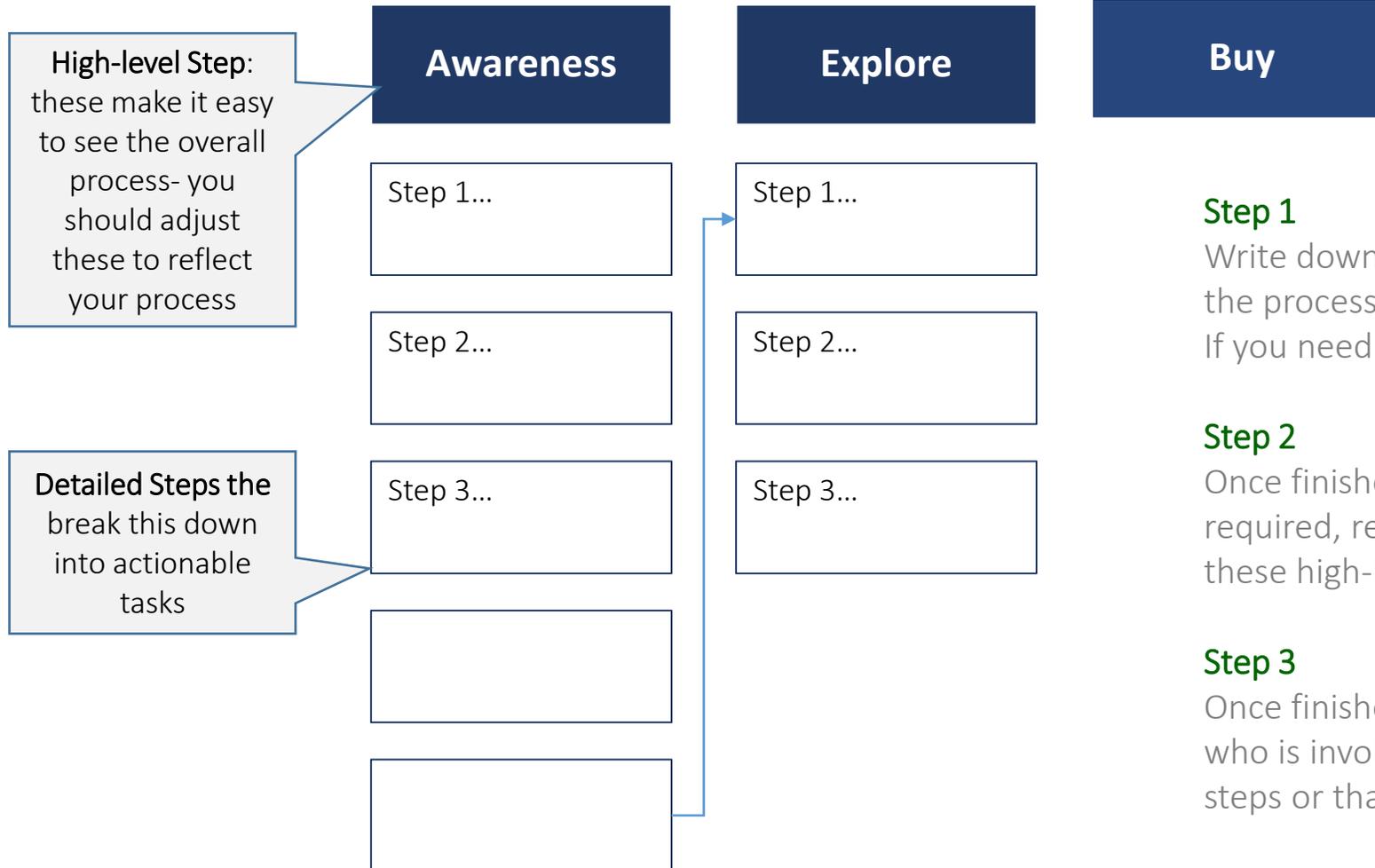
2 Always use a **verb** in the task description... *Not "Quote", BUT "Write XYZ", "Calculate ABC"*

3 Find the right **level of detail**... *too much detail and you'll get lost in the minutiae; not enough and the process will be meaningless*

1. "Quote"	Not enough detail
1. Write 1-page summary 2. Send it to Sally 3. Get Paul to do the estimate 4. Paul sends estimate to Phil to consolidate 5. Phil copy/pastes into Word 6. ...	Too much detail
1. Write Summary 2. Complete Estimate 3. Consolidate and send Quote	About right (for this context anyway)

4 Where possible, include the name of the task owner... *This will highlight gaps in the process or opportunities to handover/distribute tasks, either ways they're ideas for improvement!*

How to map the process



Step 1

Write down the detailed steps- remember to map the process as it currently is, and to use verbs. If you need more boxes, just add them in.

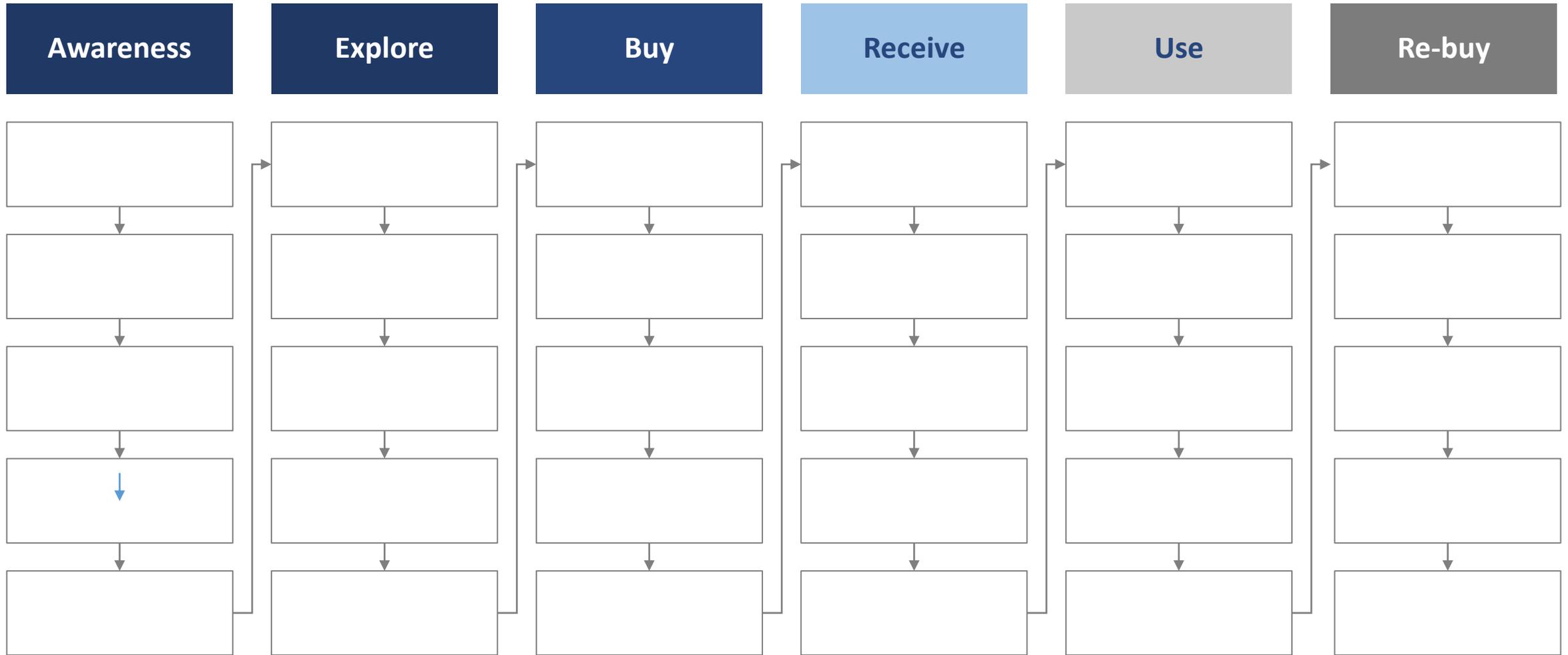
Step 2

Once finished, move to the next high-level step. If required, remember to rename and contextualise these high-level steps to your business.

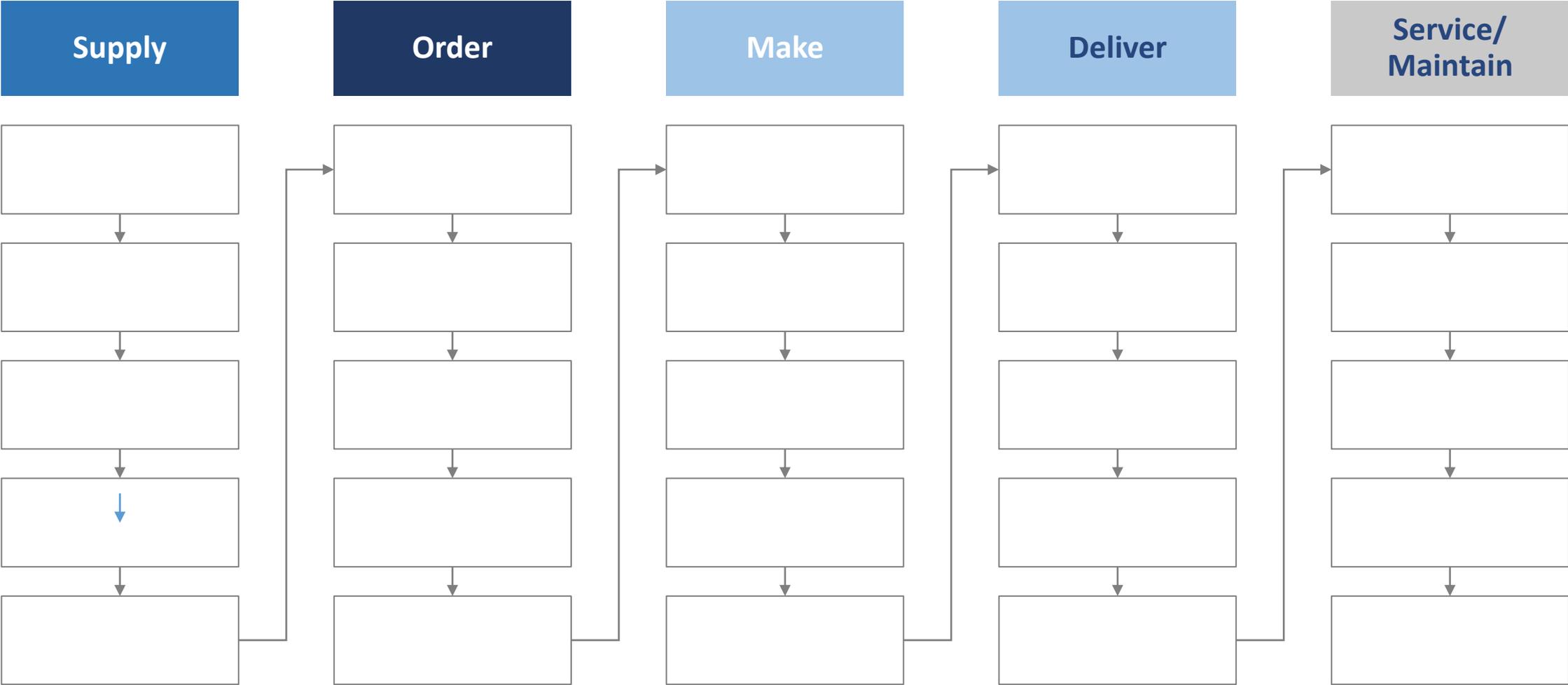
Step 3

Once finished, sense check it with someone else who is involved in the process to check for missing steps or that things are in the right order.

Exercise 1: Map your Customer Journey



Exercise 2: Map your Supply Chain



Exercise 3: Understand your Customer's Supply Chain

Where do you fit into your customers supply chain? Map out what you think is there high-level process and:

- 1) Identify where you get involved **NOW**, and perhaps where you **SHOULD** get involved
- 2) You might have multiple customers/personas, so you will have multiple supply chains

Example
Supply Chain



Customer/
Persona 1



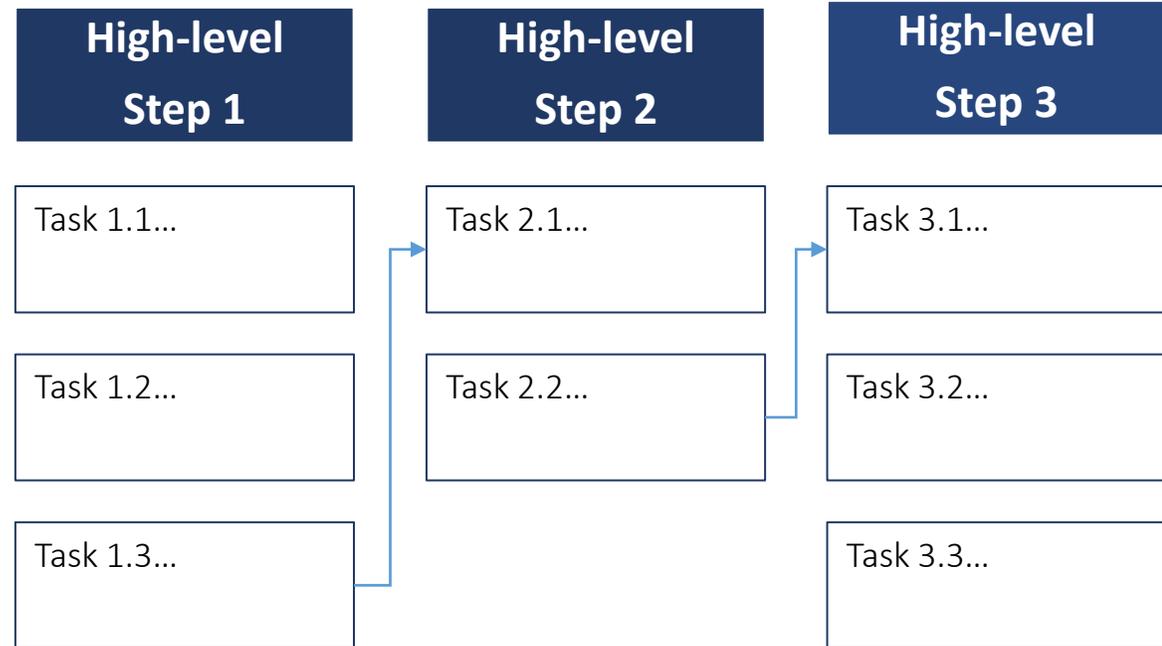
Customer/
Persona 2



Exercise 4: Map your Internal Processes

Start systematising your internal business by documenting the key processes in:

- Marketing
- Sales
- Finance
- Operations / Service delivery





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