

“PROCESS MAPPING, NOT ROCKET SCIENCE. THE BASICS.”



Nicola Lathe
Legal Technology Delivery
Director and LPM
EY Law



Abilash Unny
Senior Manager
Legal Process Improvement
Ashurst



Micah Ascano
Senior Legal Operations &
Analytics Manager
Home Depot

“We know that the changing behaviors can be tricky, but if we're able to demonstrate the value of just a small upfront investment in time, we should definitely be onto a winner. We just need to make sure that we get those guys across the line.”

PROCESS MAPPING: WHAT IS IT?

BIGGER PICTURE

Process mapping is going back to the basics. It is being able to step back and take a look at the bigger picture.

“If there's an interdependency with someone further up the process chain who's perhaps not delivering to your standard or time scales, then that's really going to impact you and your deliverables, as well as the overall client experience and the core deliverables of the overall project.”

VISUALIZATION

“The core definition of process mapping is a visual representation of every step, touch point, task, person, and resource used to complete a transaction. And with the overall goal of mapping processes being to identify and implement solutions that help to optimize workflow through the reduction of errors and an increase in quality and productivity.”

PLANNING

Using the analogy of making a Gin & Tonic, you perhaps would have your process: You start with a glass, add ice and swirl, drop in your gin, add the tonic, add some twist then garnish and serve.

“Just thinking about the glass as the starting point and the glass gone in the dishwasher as the end point, and that amazing warm, fuzzy feeling in between. And if only all transactions could make you feel like that. But the planning is an essential part of that process mapping piece as well.”

CLIENT CENTRIC

“The overall goal of process mapping is to identify and implement solutions that support engagement teams by increasing quality and productivity, as well as reducing the potential for balls to be dropped. And that allows us to then be more focused on the actual deliverables and delivering that exceptional client service to both our external clients and our internal clients alike. Four bite-sized chunks all washed down with a nice Gin & Tonic.”

HOW WE DO IT?

There are different type of Process Mapping. Some process maps and methodologies are more complex and sophisticated than others, while some can be as simple as drawing a linear process on a piece of paper or laying a process out in a series of post-it notes. The ultimate result of using whatever style of process mapping should essentially be the same.

The key to a successful process map is flexibility. There should be flexibility to keep tasks simple or to be able to add more detail for individuals, such as stakeholders, who may want more information.

BASIC PROCESS MAP

- Every process has a start and an end
- Identify the high-level stages, the steps in between the start and end
- Identify and insert the key deliverables for every stage (Further identify more information for the deliverables, i.e. resources, costs)

“Once we've identified the three key elements of the transaction or engagement, we then essentially have all of the information needed to repair a high level project plan and the associated resource and costs for that particular engagement or transaction.”

CONSIDER YOUR AUDIENCE

- Who is the audience?
- Are they very technical?
- Are they less technical?

Everyone has their own style when building a process map, and it is important to consider who your audience is. Your audience will influence what your process map looks like.

“We work with each other and to understand that we have a process that touches both of us and standardizing that to have a better efficiency and better understanding between what I do as a client. What you do as a firm is really important.”

EXAMPLE 1. THE SWIM LANE PROCESS MAP

An example of a simple process map is the swim lane style process map. The swim lane style process map separates and details the tasks of each individual or entity in rows, or lanes. You can look across the row and see all the steps that you need to do or you are engaged in. The same goes for others involved in the process map, they all have their own lane with their own tasks that they're engaged in. Each row can be clearly identifiable by utilizing separate colors.

Additionally, elements can be added to enhance the information in the process map. Vertical lines can be used to break off pieces of the process into phases. This can be labelled with a name or a time line, i.e. weeks or months. Symbols are a great element to incorporate, it could define a checkpoint, which could mean more information is needed or a matter needs to be re-visited. Moreover, symbols could be used to signify a sub-process, or a complicated process in itself.

The important advantage of the swim lane style process map is that individuals from the firm and clients are all in the same process, hence everyone knows what is happening and is on the same page.

EXAMPLE 2. BPMN PROCESS MAP

BPMN process maps takes it one step further. It allows you to push out your process into automation, or enables you to integrate or map out the process within any RPAs in the future.

BPMNs have a high level of complexity and customizability. For example, decision boxes enables matters to go one way or another. Multiple things can also happen at the same time in a particular process. Unique process codes can also be attached to each step, which requires a level of maturity.

WHY PROCESS MAPPING IS SO IMPORTANT?

ACCURATE UP FRONT SCOPING & PLANNING =

- ✓ ACCURATE PRICING / REDUCED COSTS
- ✓ EFFICIENT SERVICE DELIVERY
- ✓ SATISFIED LEGAL TEAMS AND CLIENTS
- ✓ REPEAT BUSINESS