



# What is Process Mapping and How Does it Help You Launch Successful Products?

*by Noël Adams and Anne Bakstad*

Successful companies everywhere use process mapping to both develop and improve processes. The tool technique can be used for discrete sub-processes like reengineering an accounts payable or other backend business process. Or, it can be used to develop new, comprehensive processes like building the full quote to cash process to support the launch of a new product or a new line of business. Companies launching new products and services benefit greatly from the approach. Here's why:

## What is Process Mapping?

Process mapping refers to identifying the discrete steps involved in a process. Process mapping for a product or service launch includes outlining all the steps from "quote to cash" in delivering a product or service to a customer. You literally create and document a map of the process.

## Why Do Process Mapping?

Process mapping ensures that you have the infrastructure ready to handle your product launch. It identifies cross-functional roles and responsibilities, as well as hand-offs. Creating a process map uncovers many useful pieces of information, including customer touch points, assumptions, issues for resolution, system requirements, and communication needs (both internal and external). The process map is the tool that allows you to communicate roles and responsibilities with the rest of the organization. It facilitates understanding of how various functions will be handled once your product or service is launched. Your process maps can also be used to generate detailed work procedures and policies as needed.

## Who is Involved?

Process mapping should be done with the cross-functional team impacted by and involved in a particular process. For a quote to cash product launch process, the cross-functional team is typically quite broad. Launching a new product or service impacts everyone from business support groups like Finance and IT to Marketing and Sales to Customer Support and Billing. Subject matter experts from each of the functional areas should be represented in a process mapping session. Engaging all of these groups allows the team to collectively create the process and ensures that there is buy-in and ownership of the process once it is created. It also ensures that no step or function in the process is inadvertently left out.

## How To Do Process Mapping

You should do process mapping in a 1 or 2 day session depending on the size of the process. Invite the cross functional team to a meeting. Process mapping is best done either offsite or in a conference room away from the day-to-day fire fighting. You need people to get engaged and stay engaged. Invite a trained facilitator to facilitate your session. This ensures that an objective person is capturing all of the feedback from the team and can intervene to help settle any differences in how a certain task should be handled. Facilitators who specialize in process mapping and have experience process mapping for product launches can share best practices and help move the group along. The facilitator will lead the team through the session, literally asking the question "and what happens next?" until the entire process is identified. Specific tasks are put onto post-it-notes and placed on flip chart paper so that steps in the process can be moved around as the group makes decisions. After the session the process is documented into Visio flow charts.

## Output from Process Mapping

### Process Maps

The written process maps from the session get converted into Visio flow charts that identify the steps in the process and who is responsible for each step.

### Action Item List

Every process mapping session leads to an action item list for team members. The exercise brings up all of the actions and tasks that need to be done to launch the new product or service.

### Issues List

Inevitably there are a list of issues that must be resolved and decisions that must be made before the product can roll out. The process mapping session uncovers an issues list, allowing important decision points to rise to the surface.

### Other Outputs

Depending on the group and the process, there may also be lists generated for IT requirements, common assumptions, etc.

## Tips for Successful Process Mapping

- Keep your process maps simple, straightforward and usable.
- Make sure your process maps identify functional areas responsible for each step in the process.
- Use an outside facilitator to ensure objectivity and buy-in from the team.
- Share the documentation of the process widely.

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Clearworks provides product management and product marketing expertise and resources to help companies build, launch, and market new products. Projects span the product lifecycle from new product research and market analysis to writing product requirements to product messaging strategies and product launch planning. Clearworks team members also deliver workshops on a variety of new product topics including innovation tools and process mapping for product launch.