

Processes Handout 1: Hints on devising a flowchart

- Identify all stakeholders in the whole process.
- Bring together the essential stakeholders in the process. If this isn't possible ask team members to look at the process from another stakeholder's point of view.
- Use a facilitator to keep people focused on the task.
- Start by charting what is, rather than how you would like things to be.
- Note where there are gaps or duplications in the existing process.
- Use sticky notes because they can be easily moved around.
- Use a white board, if possible, to draw up the chart. It makes it easier to change things.
- When dealing with a complex process, draw up separate charts for the sub-processes before integrating them into a single, complete chart.
- Keep questioning the flowchart. It's all too easy to leave out vital details because people take them for granted.
- Numbering the boxes on the flowchart is useful if you need to make reference to them elsewhere.
- Put the titles of people and/or departments in boxes when they first become involved – and subsequently if they get involved again later – to indicate where responsibility passes from one function to another.
- Use the basic flowcharting symbols only (see Handout 2).
- When drawing decision boxes, keep the 'Yes' flow lines vertical, and the 'No' flow lines horizontal, to the right or left – whichever is more convenient.
- Where appropriate, flow lines from decision boxes may be labelled with words other than 'yes' or 'no'.
- Use connectors to create links between items on different pages and to avoid 'spaghetti' links on the same page! Use page numbering (e.g. p2 of 3) if the flowchart uses more than one page.
- When devising a flowchart to represent a re-designed or improved process, build in features that will provide feedback on the effectiveness of the process and the changes made.
- Put a date on your flowcharts to avoid the confusion of working from different and maybe out-of-date versions.
- Use flowcharting software, if possible.