NAVVIA™
Webinar

Best Practices in Process Design and Documentation:
Drive Efficiency and Reduce Costs

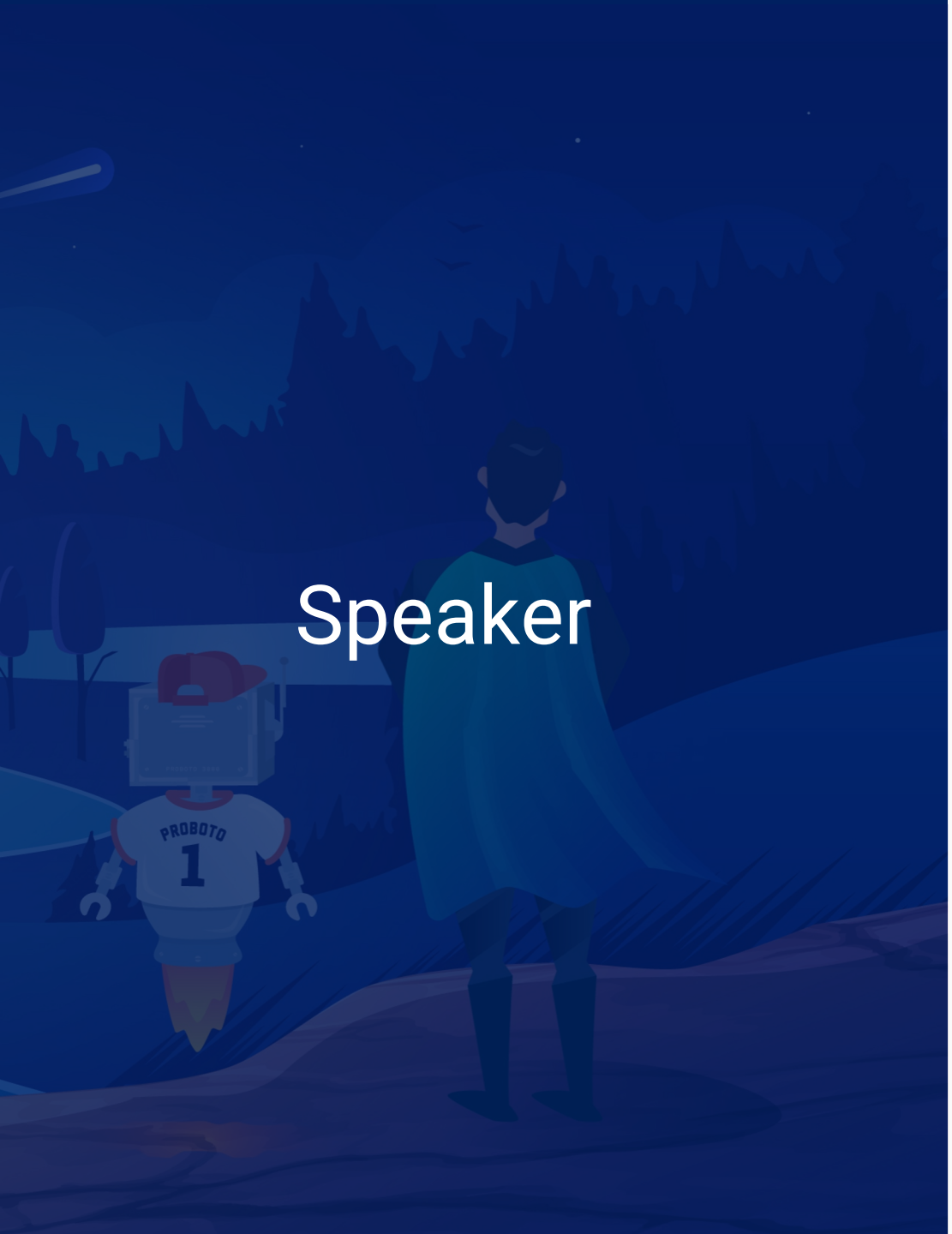
May 25, 2023

Welcome to the Webinar!

Katherine
Marketing Coordinator

- ✓ Use the Zoom 'questions' panel to ask any questions you have
- ✓ Chat is a great way to make comments
- ✓ We'll email you the recording and slides

NAVVIA™



Speaker

David Mainville
CEO & Co-founder
Navvia

NAVVIA™

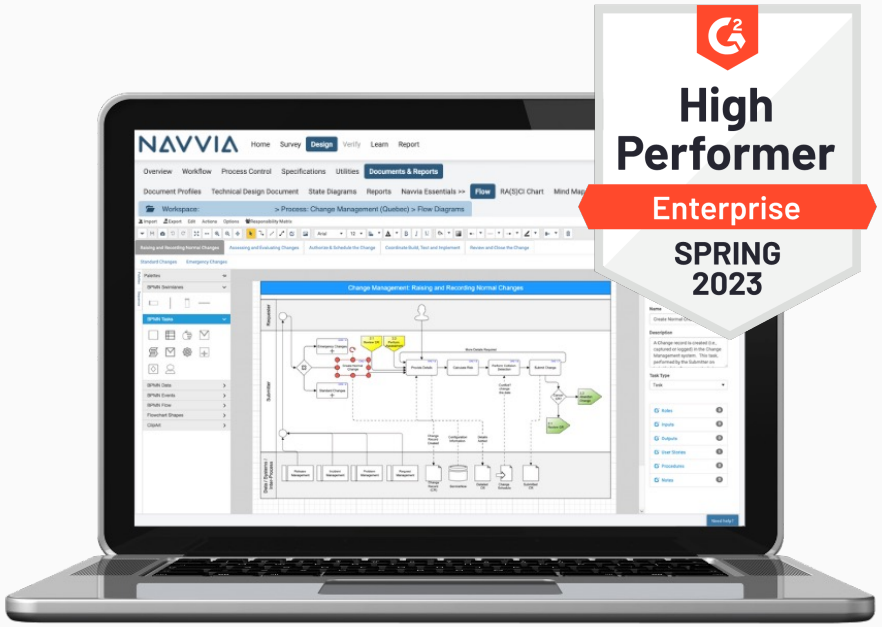
Users Love Us

NAVVIA™

Navvia has been rated #1 in Quality of Support

Easiest To Do Business With
Mid-Market
SPRING 2023

Best Support
Mid-Market
SPRING 2023



High Performer
Enterprise
SPRING 2023

High Performer
SPRING
2023

High Performer
Mid-Market
SPRING 2023

Read our reviews on G2.com

Today’s Webinar

Best Practices in Process Design and Documentation

- Why is process design and documentation essential?
- The importance of engaging your stakeholders
- What constitutes good process documentation
- The relationship between process documentation and automation
- Q/A

NAVVIA™

Poll question

Question: How would you rate the maturity of you company's process documentation efforts?

1. *Processes are not documented*
2. *The quality of process documentation varies across the company*
3. *Processes are consistently documented and centrally stored*
4. *Process documentation is managed, reviewed and updated*
5. *Process documentation helps drive process improvements*

Engaging Your Stakeholders

Engaging the stakeholders is critical when designing and documenting processes:

- Enhance buy-in and ownership (OCM)
- Improve understanding of business needs
- Identify potential roadblocks
- Increase efficiency
- Foster innovation

Techniques you can use to engage stakeholders:

- Process assessments
- Interviews
- Process workshops
- Validation sessions
- Document reviews

NAVVIA™

Dealing with resistance

- Communicate the purpose & benefits
- Foster and sense of ownership
- Provide multiple ways to get involved
- Sponsorship
- Support of respected peers

Process Assessments

- A great way to engage your stakeholders
- Helps create a sense of urgency
- Learn how others see your processes
- Identify gaps and set a roadmap for improvement
- A key part of Business Process Management (BPM)

NAVVIA™

Practical Demonstration

NAVVIA™

Process Mapping and Deliverables Creation

There is much more to Process Documentation than a workflow map

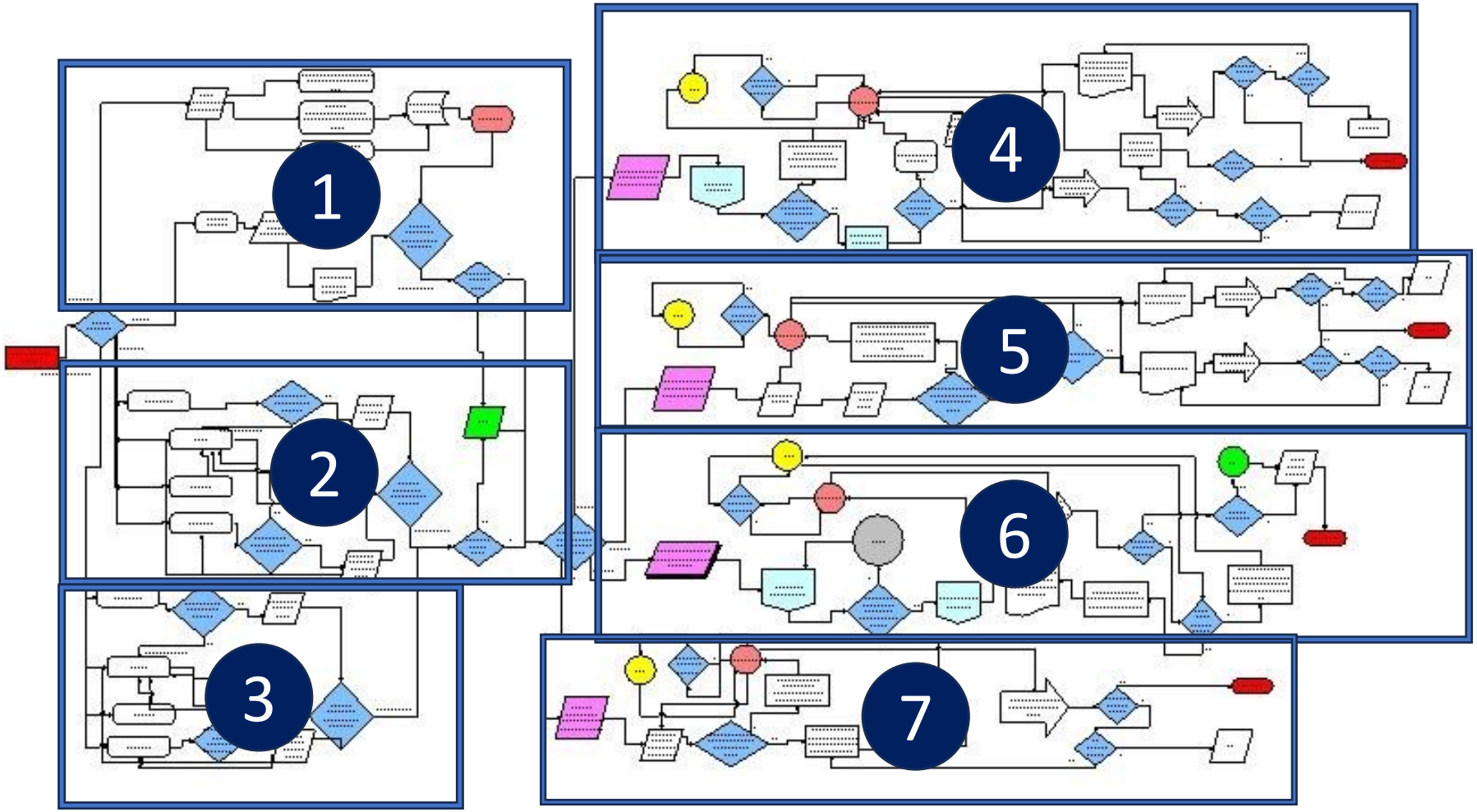
The Importance of Process Design & Documentation

Comprehensive process documentation enables organizations to:

- Standardize and streamline operations, improve efficiency, reduce costs, and enhance quality.
- Identify inefficiencies, reduce errors and variability, and ensure that everyone in the organization is producing consistent results.
- Train new employees, comply with industry standards and regulations, and implement continuous improvements.
- Drive automation and digital transformation.

NAVVIA™

Process Documents Should Enable Understanding



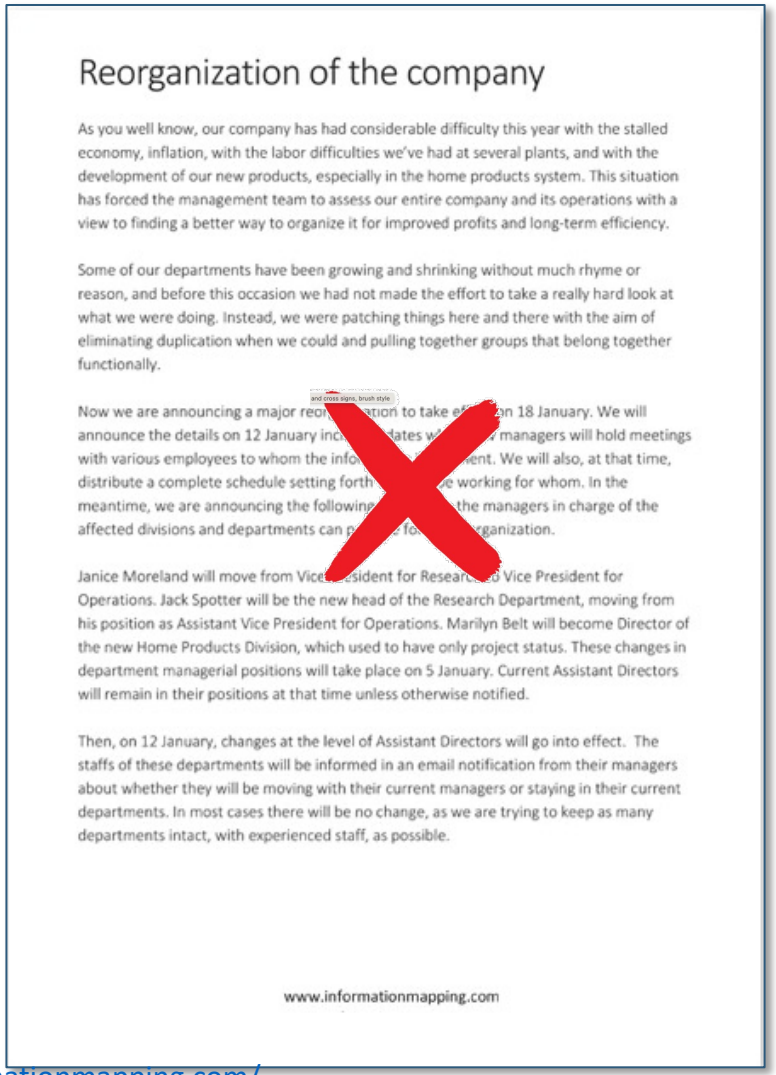
NAVVIA™

Information Mapping

- Information Mapping is a structured approach to organizing and presenting information. The goal of information mapping is to create documents that are easy to read, understand, and use.
- The Information Mapping method breaks down information into smaller, more manageable units called "information chunks". These chunks are organized into a hierarchical structure that allows readers to quickly find and understand the information they need.
- Information Mapping is based on the principle that people learn and process information more effectively when it is presented in a clear and logical manner.
- This approach is commonly used in technical writing, but can be applied to any type of communication.

NAVVIA™

Information Mapping



Reorganization of the company

As you well know, our company has had considerable difficulty this year with the stalled economy, inflation, with the labor difficulties we've had at several plants, and with the development of our new products, especially in the home products system. This situation has forced the management team to assess our entire company and its operations with a view to finding a better way to organize it for improved profits and long-term efficiency.

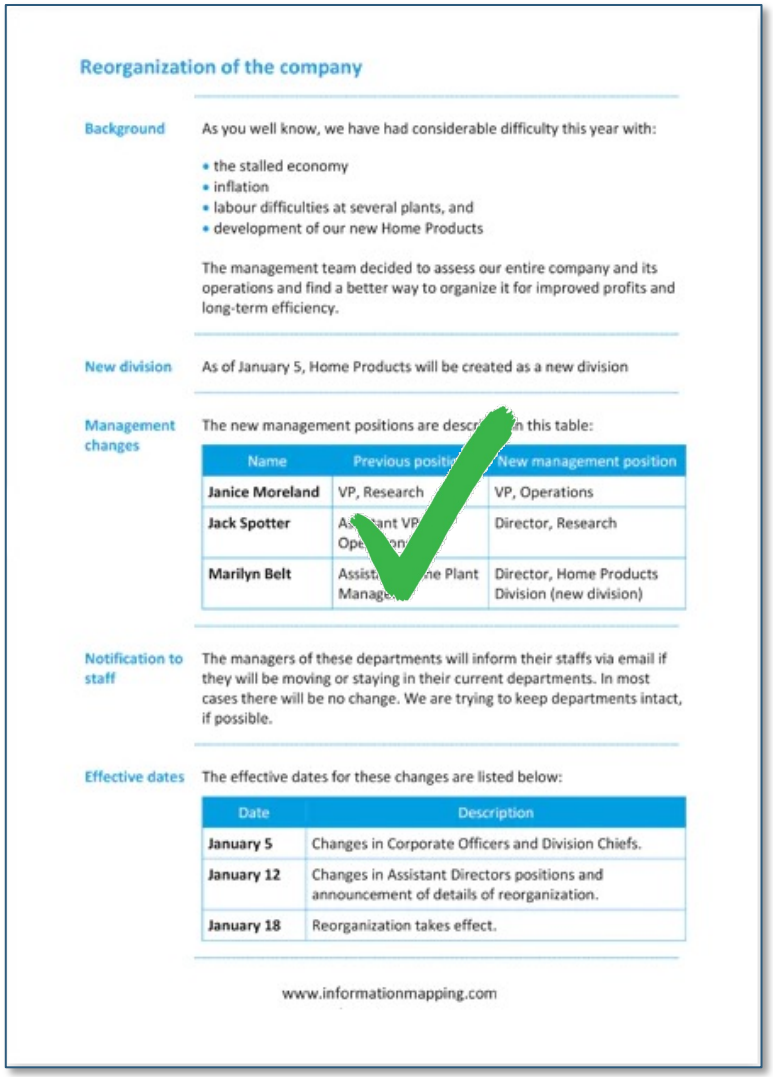
Some of our departments have been growing and shrinking without much rhyme or reason, and before this occasion we had not made the effort to take a really hard look at what we were doing. Instead, we were patching things here and there with the aim of eliminating duplication when we could and pulling together groups that belong together functionally.

Now we are announcing a major reo[illegible]tion to take e[illegible]n 18 January. We will announce the details on 12 January inc[illegible]dates w[illegible]managers will hold meetings with various employees to whom the info[illegible]ent. We will also, at that time, distribute a complete schedule setting forth[illegible]e working for whom. In the meantime, we are announcing the following[illegible]the managers in charge of the affected divisions and departments can p[illegible]fo[illegible]rganization.

Janice Moreland will move from Vice[illegible]esident for Researc[illegible] Vice President for Operations. Jack Spotter will be the new head of the Research Department, moving from his position as Assistant Vice President for Operations. Marilyn Belt will become Director of the new Home Products Division, which used to have only project status. These changes in department managerial positions will take place on 5 January. Current Assistant Directors will remain in their positions at that time unless otherwise notified.

Then, on 12 January, changes at the level of Assistant Directors will go into effect. The staffs of these departments will be informed in an email notification from their managers about whether they will be moving with their current managers or staying in their current departments. In most cases there will be no change, as we are trying to keep as many departments intact, with experienced staff, as possible.

www.informationmapping.com



Reorganization of the company

Background

As you well know, we have had considerable difficulty this year with:

- the stalled economy
- inflation
- labour difficulties at several plants, and
- development of our new Home Products

The management team decided to assess our entire company and its operations and find a better way to organize it for improved profits and long-term efficiency.

New division

As of January 5, Home Products will be created as a new division

Management changes

The new management positions are descr[illegible]n this table:

Name	Previous positi[illegible]	New management position
Janice Moreland	VP, Research	VP, Operations
Jack Spotter	As[illegible]ant VP[illegible] Ope[illegible]on	Director, Research
Marilyn Belt	Assist[illegible]e Plant Manage[illegible]	Director, Home Products Division (new division)

Notification to staff

The managers of these departments will inform their staffs via email if they will be moving or staying in their current departments. In most cases there will be no change. We are trying to keep departments intact, if possible.

Effective dates

The effective dates for these changes are listed below:

Date	Description
January 5	Changes in Corporate Officers and Division Chiefs.
January 12	Changes in Assistant Directors positions and announcement of details of reorganization.
January 18	Reorganization takes effect.

www.informationmapping.com

Source: https://informationmapping.com/

Key Elements of Process Documentation

- Process Description
- Process Goals and Objectives
- Process Roles and Responsibilities
- Supporting Systems
- Process Maps
- Process Actives (high level steps in the process)
- Task Details (responsibilities, inputs, outputs, and procedures)
- Process Governance (controls, metrics and policies)
- Automation Requirements (user stories, technical & functional requirements)
- Links to external documentation:
- Glossary of Process Terms and Definitions

NAVVIA™

Information Mapping and Process Documentation

NAVVIA™

Practical Demonstration

NAVVIA™

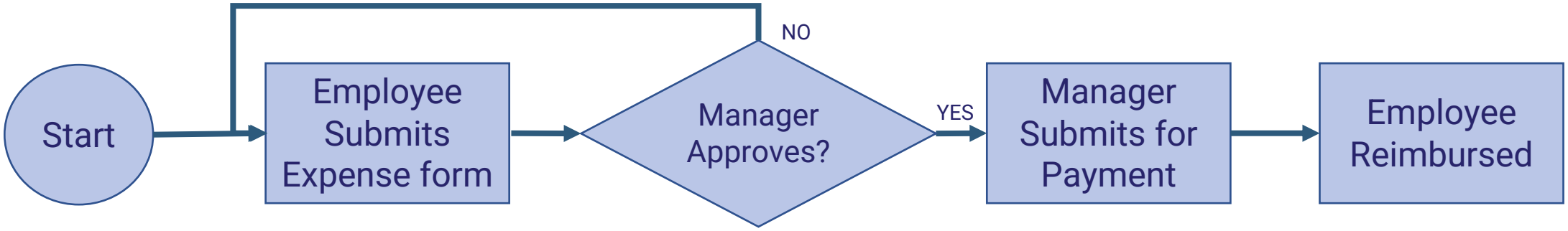
Requirements Gathering and Process Automation

Process documentation is the blueprint that can drive process automation and digital transformation

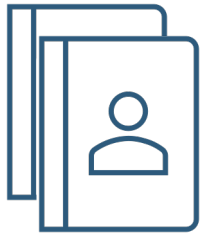
NAVVIA™

Process Driven User Stories

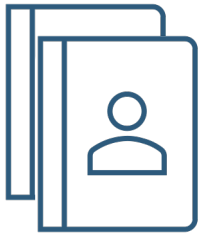
Process

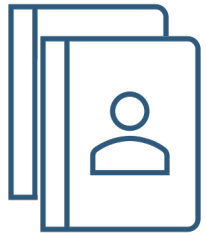


User Stories



The employee, conforming to accounting policies, must submit a detailed expense form





Technical Requirements

- Place these specific fields on expense form
- Create expense report #
- Send notification to manager once submitted
- Change status to submitted

NAVVIA™

Practical Demonstration

NAVVIA™

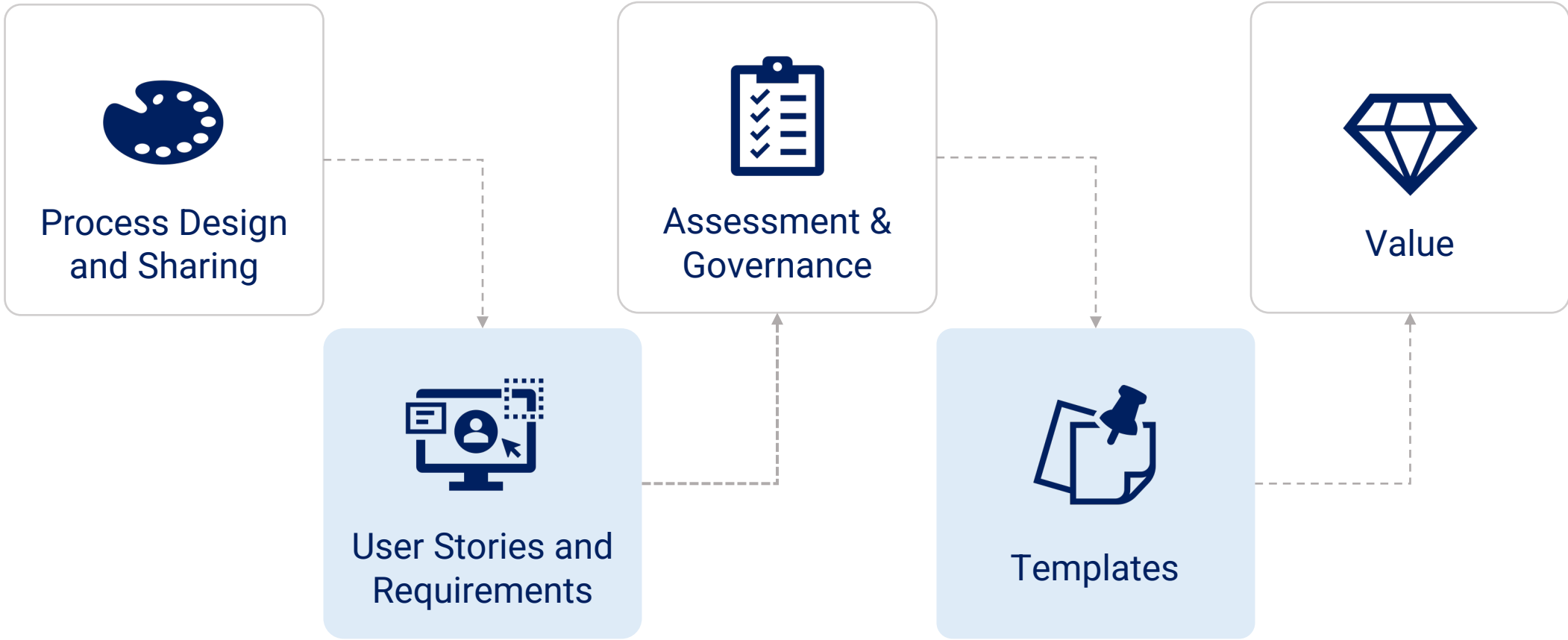
Q&A

NAVVIA™

Navvia Process Designer

Designed for the Business Process Management

Key Features



Learn how Navvia can really make your BPM perform!

Schedule a demo today

https://navvia.com/contact/

Upcoming Events

17 Aug

The Value Of A Process Maturity Assessment

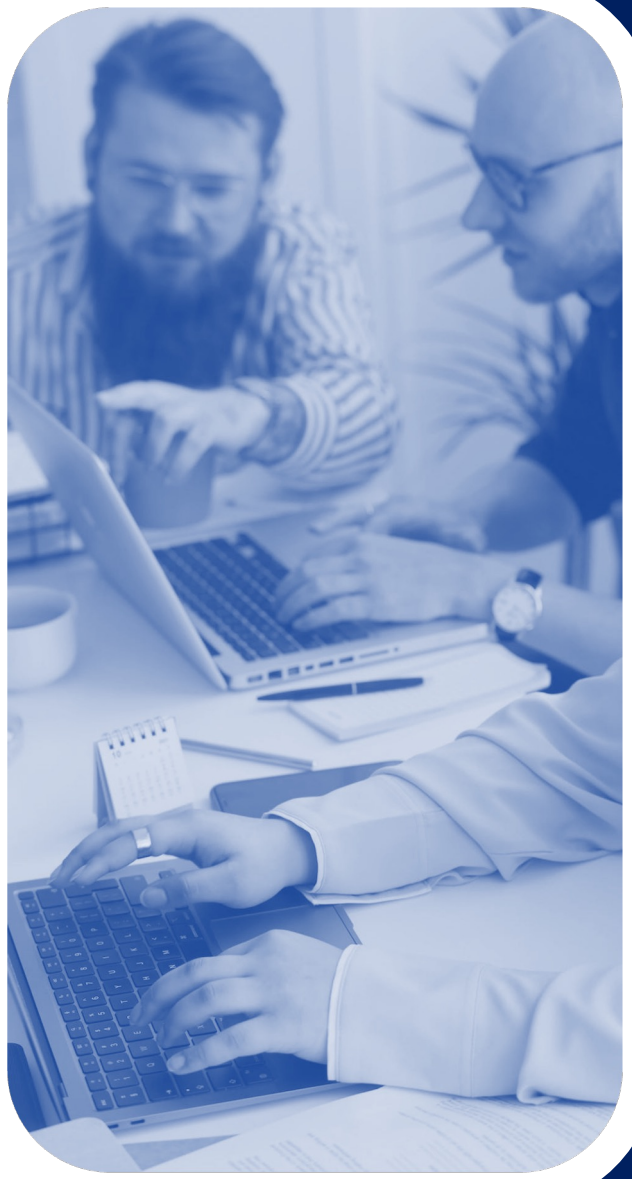
Navvia Expert

Registration will open soon

16 Nov

Key Factors For Digital Transformation Success

Navvia Expert

Registration will open soon

Thank you!