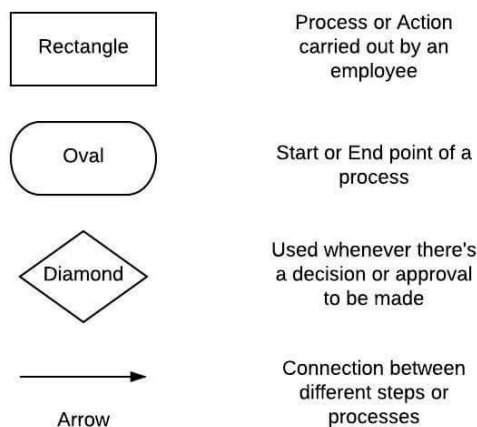https://tallyfy.com/workflow-diagram/

How to Create a Workflow Diagram

Symbols and Tools

Before you can create a workflow diagram, you should have a basic understanding of how the symbols work. The symbols, however, vary. There are a lot of ways to document workflows, some of which can be hard to learn and remember (BPMN, for example). Here's a simple cheat sheet to help get started, though…

Rectangle	Process or Action carried out by an employee
Oval	Start or End point of a process
Diamond	Used whenever there's a decision or approval to be made
Arrow	Connection between different steps or processes

While the list we've mentioned above isn't comprehensive (there's a lot of different symbols depending on use-case), it's a simple way to get started. Then, once you've got the symbols down, you'll need to pick the right tool.

Pen and Paper – the most basic (and easiest) option. Just grab a pen and paper and draw the process either from memory or through consulting the process lead.

Flowchart Software – software dedicated to graphing, specifically. Since you'll probably be storing the charts online, anyway, this takes out the extra step of scanning.

Workflow Management Software – just about the same thing as flowchart software, with several significant benefits. Software, in addition to visualization, allows you to

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keep track of the workflow online, automate certain steps, identify bottlenecks through analytics, etc.

5 Steps to Creating a Workflow Diagram

Now that you know how the technicalities work, here's how to create the diagram that's going to be both legible and helpful.

Step #1: Pick the Process to Graph

First off, you'll need to determine what's the purpose of the diagram. i.e, is it for onboarding? process analysis and improvement? Depending on what you're going for, you'd need to include different types of information. For analysis, for example, you'd have to be a lot more specific about process steps, mentioning information such as resource input, output, etc. With onboarding, you just have to mention the roles, responsibilities and exact to-dos.

You should also consider who's going to be seeing the workflow. If it's a client, you shouldn't mention any overly sensitive company information. Finally, make sure to strictly define the workflow – where does it start, and where does it end. This ensures that you don't go overboard and map the exact process you want to work with.

Step #2: Gather Information

Whatever your role is in the organization, chances are, you don't know everything there is to know about every process.

Consult the right people and learn as much as you can. Ask questions, such as…

1. Who's in charge of what activity or task?
2. What's the process timeline?
3. Are there possible deviations?
4. What tasks are involved in each step of the process?
5. Are there any delays in the process? Potential improvements? Bottlenecks?

Step #3: Design the Workflow

Now that you have a good idea of how the process works, you can finally design the process. Use the information you've learned to finally visualize the as-is process.

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If you're using the workflow diagram for onboarding or process instruction, you're done. All you have to do is ensure that all the right employees have access to the graph. If, instead, you're in it for process analysis or improvement, move to the next step.

Step #4: Analysis and Improvements

Now that you've already done the visualized the process, you probably already know a thing or two you could improve the process. If now, you can ask yourself several questions…

- Are there any process steps that are lagging? Bottlenecks? Tasks taking more time than they should?

- What are the most important activities for the process to be successful? How do they affect the end-product? Can you make them more efficient through automation? Cutting out steps? Changing things up?

- Are certain steps riskier than they reasonably should be? Any missed deadlines?

- Can you identify processes that are more expensive than they should reasonably be?

To make this step easier, you can use several different analysis techniques, such as the Cause and Effect Analysis or the 5 Whys Method

Step #5: Create a To-Be Process

Once you've got the improvements figured out, you'd want to reflect that on your workflow diagram. While you could just start executing it, it's more efficient to have something to show to your employees.

This way, they're far more likely to stick to the new method, rather than revert back to the old one whenever you're not looking. Or, if you're using workflow management software, all you have to do is make a change to the process template, which will ensure that whenever the employees start a process, it's going to be the latest version.

Types of Workflow Diagrams

There are several different ways to create workflow diagrams, with these 4 being the most popular.

Process Flowchart – the simplest (and the most straightforward) type – all you have to do is map the process chronologically (what follows what).

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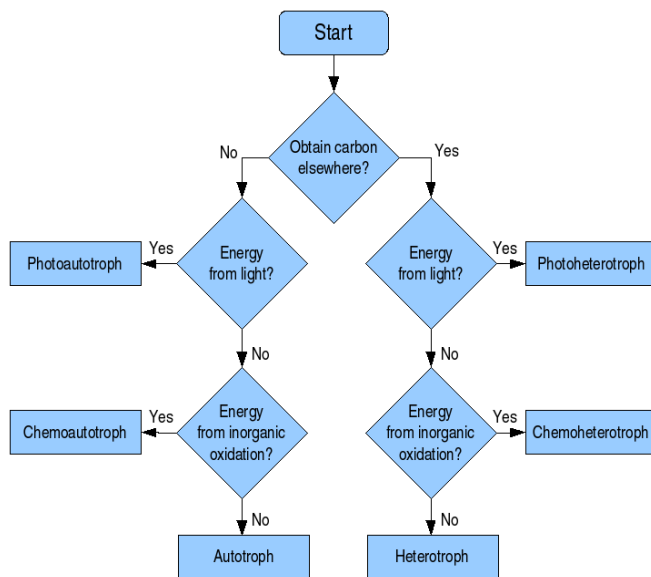
BPMN – a very specific way of creating flowchart diagrams. The difference is that BPMN uses standardized symbols and elements, making it easier for other people or companies to understand the diagram.
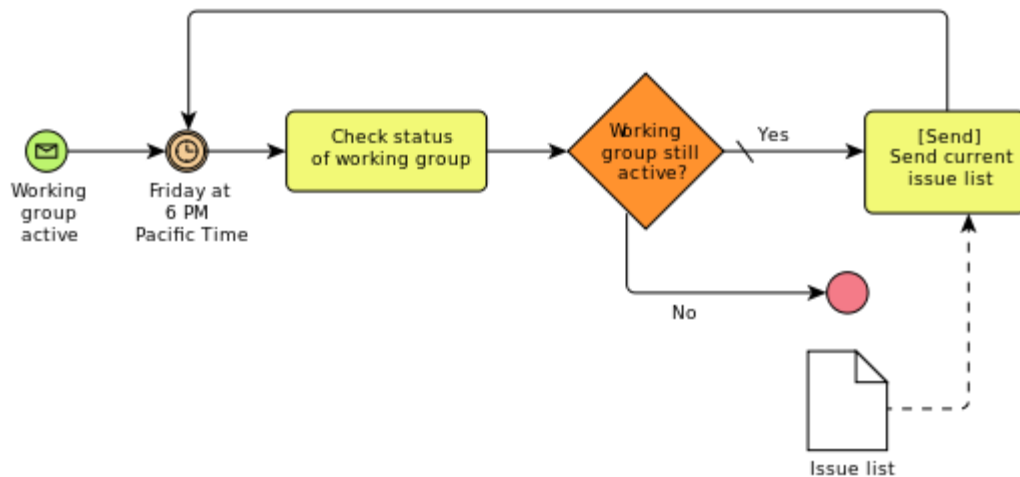
Swimlane – functions just about the same as a regular flowchart. The one differentiator here is that the process is split into different departments.
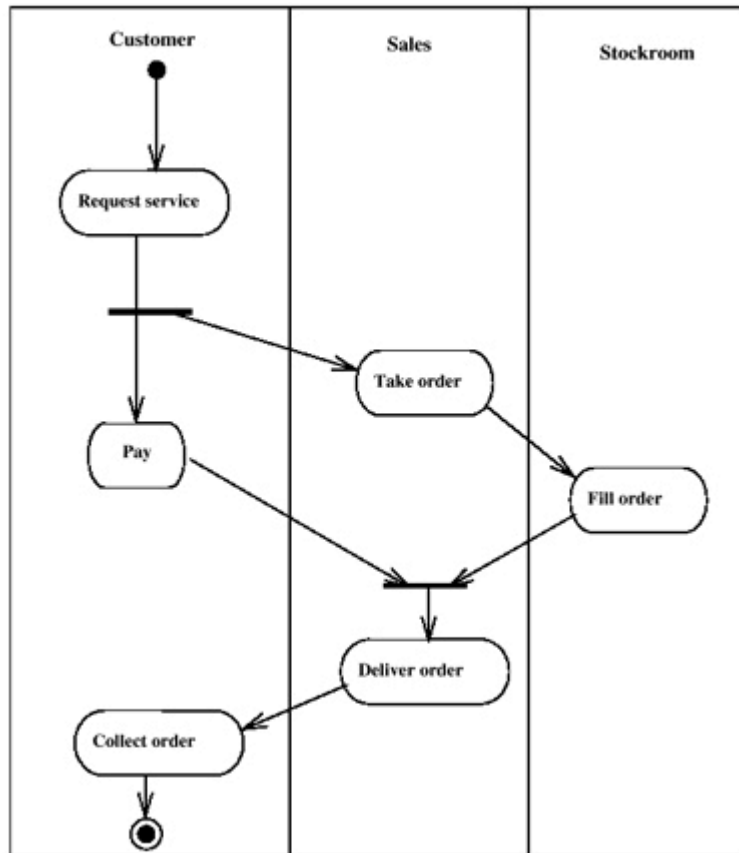
SIPOC – stands for Suppliers Inputs Processes Outputs Customers. Unlike the flowchart, SIPOC doesn't have anything to do with the order of steps within a process. Rather, it focuses on analyzing the most important aspects of a workflow.

Process or Function Name: AUTOMOTIVE DIVISION CUSTOMER SERVICE			Date: 2/4/16	
Scope: ALL U.S. CUSTOMER SERVICE FOR AUTOMOTIVE DIVISION. CANADA AND MEXICO OUT OF SCOPE.			Notes: EDI ORDER MAINTENANCE WILL BE ADDED ON 5/1/17	

SIPOC Diagram

Suppliers	Inputs	Processes	Outputs	Customers
Who supplies the process inputs?	What inputs are required?	What are the major steps in the process?	What are the process outputs?	Who receives the outputs?
CONSUMERS	PHONE ORDERS	(1) ENTER PHONE AND FAX ORDERS	ORDERS ENTERED	CONSUMERS
RETAIL CUSTOMERS	FAX ORDERS	(2) RESPOND TO TECHNICAL SUPPORT CALLS	CLOSED CUSTOMER INQUIRIES	RETAIL CUSTOMERS
SAP CRM SYSTEM	CUSTOMER CALLS AND EMAILS	(3) RESPOND TO ORDER STATUS INQUIRIES	RAPID-ALERTS DISTRIBUTED	MATURE-PRODUCT ENGINEERING
FIELD SALES TEAM	CUSTOMER PORTAL INQUIRIES	(4) MAINTAIN RAPID-ALERT SYSTEM FOR PRODUCT ISSUES	MONTHLY CS METRIC REPORT	EXECUTIVE MANAGEMENT
TECHNCIAL PRODUCT DATABASE	DATA FOR MONTHLY METRICS	(5) PUBLISH MONTHLY CS METRICS		MANUFACTURING QUALITY
SAP ERP SYSTEM	PRODUCT APPLICATION DETAILS			FIELD SALES TEAM
	ORDER STATUS			

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