



National Association of  
College and University Mail Services

# Workflow Management and Process Mapping

## 2024 Educational Conference

**Mark M. Fallon**  
**The Berkshire Company**  
[www.berkshire-company.com](http://www.berkshire-company.com)

1



What is “workflow management”?

2



What is “process mapping”?

3



Thinking outside the box and  
inside the loop.

4

## Messaging

Data File      Print File      Print      Finish      Post

5

Organization

Inbound

**MESSAGING**

Outbound

Customer

6



Who do you need to involve?

7



What information you need?

8



How do you get the information you need?

9



Ask the right questions:

- What?
- Who?
- When?
- How?
- Where?

10

The wrong question:



11

A really good question:

What if?

12



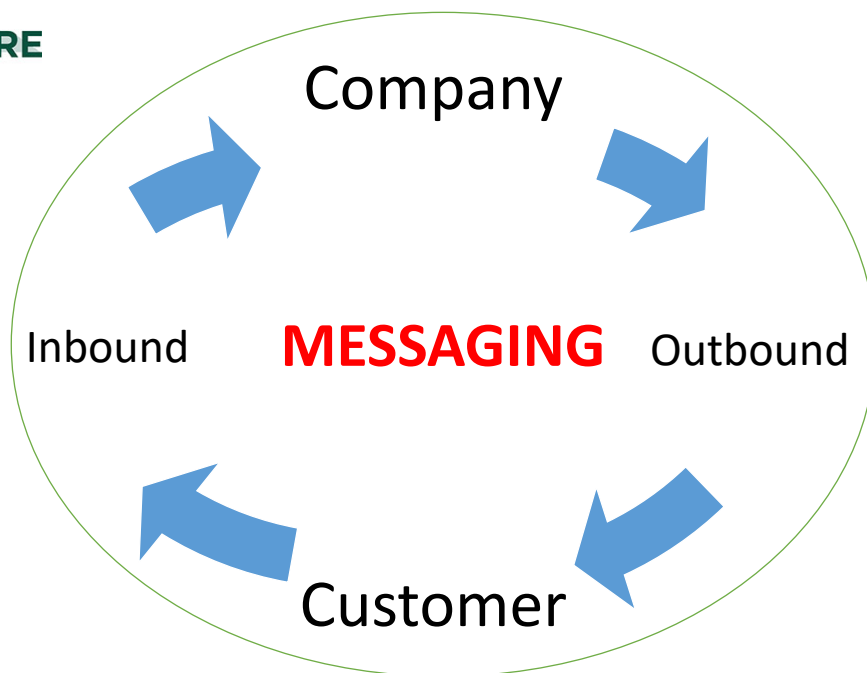
13



14

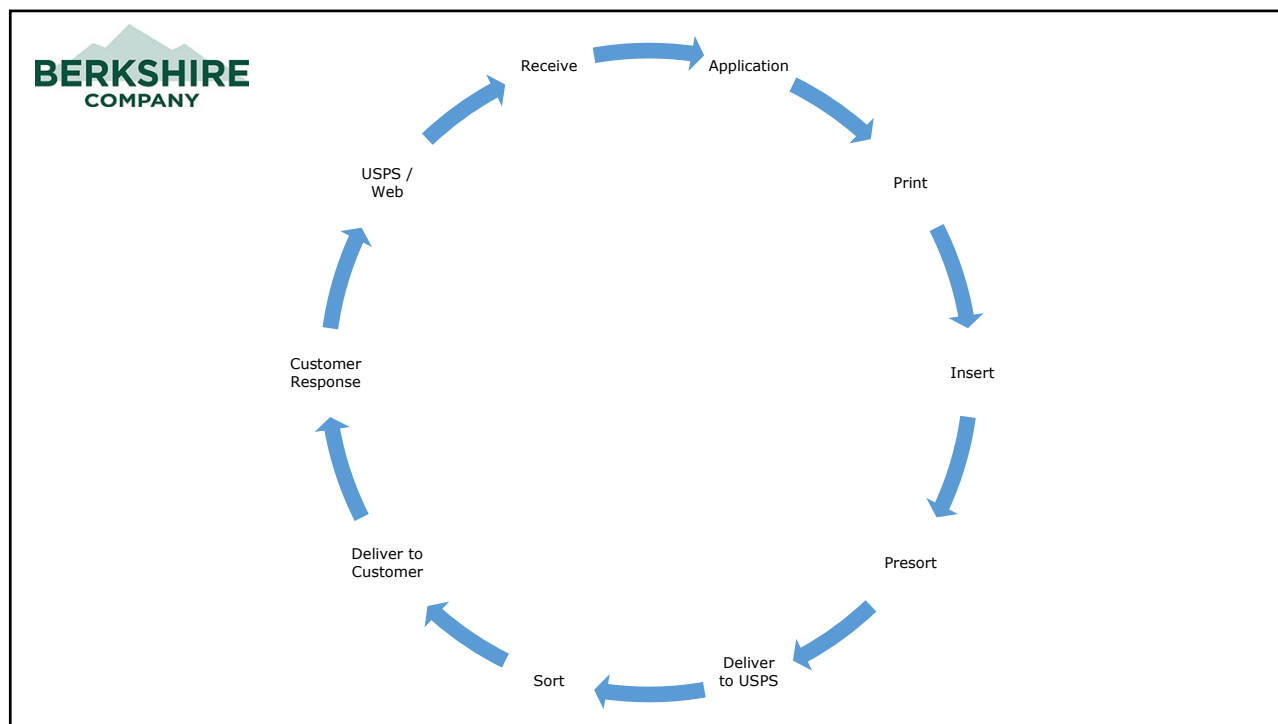
How do you map out the process?

15

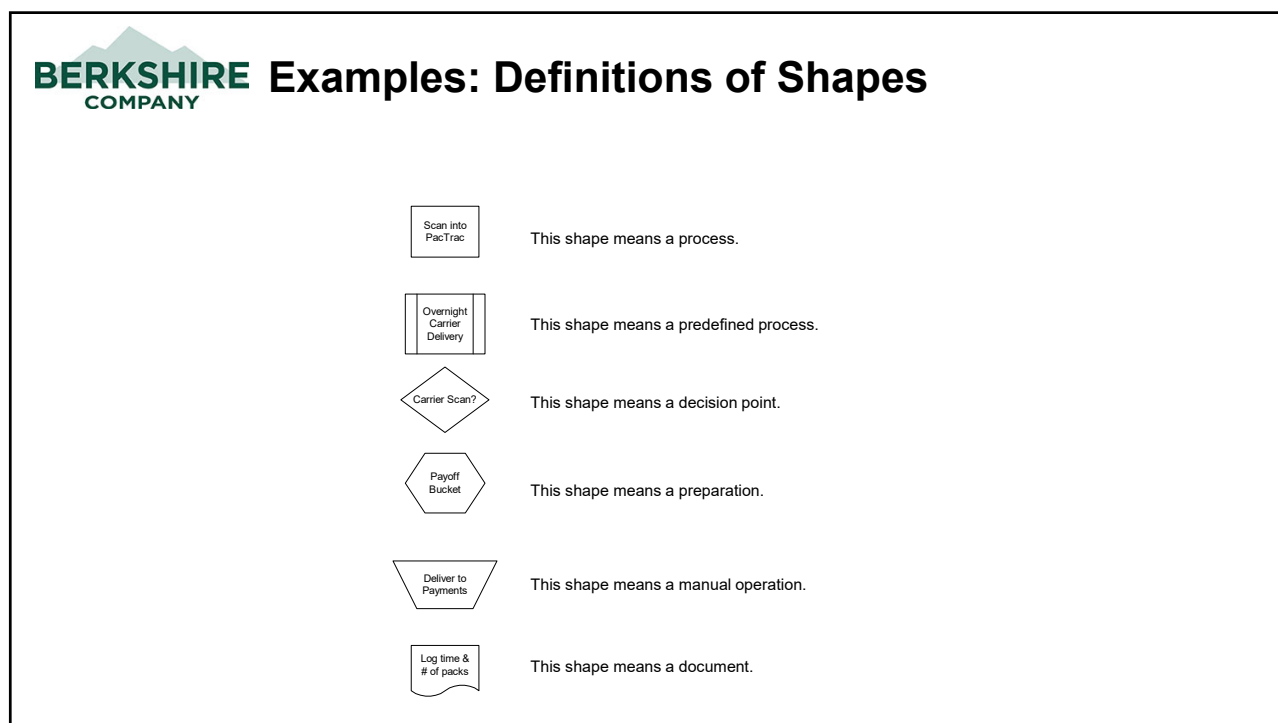


16

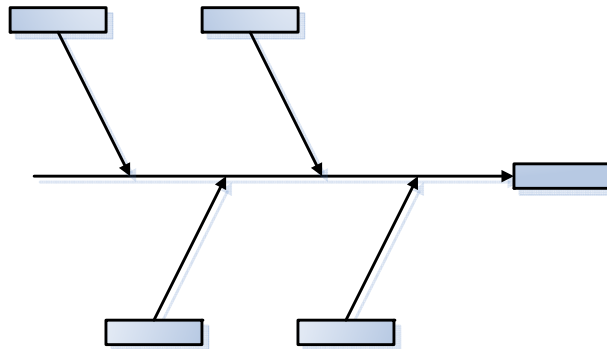




17

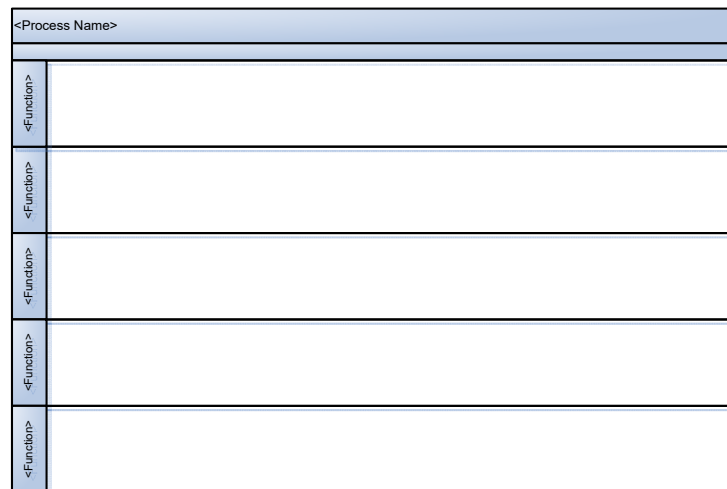


18



Cause and Effect Flowchart

19



Cross-Functional Flowchart  
(Swim Lane)

20





Corporate Document Services Process - Print and Insert

```

graph TD
    Start([Start]) --> D1{After 2400hrs?}
    D1 -- Y --> A1[Look for Print File CDS\PRINT]
    A1 --> D2{Greater than 65K?}
    D2 -- Y --> A2[Call SAC]
    D2 -- N --> D3{VMECO finished?}
    D3 -- Y --> A3[Process Print Job]
    D3 -- N --> A4[Call SAC]
    A3 --> D4{Printer Available?}
    D4 -- Y --> A5[Printer job on IBM 4000 12500 bpi]
    D4 -- N --> D5{Change Printer?}
    D5 -- Y --> D4
    D5 -- N --> A6[Call IBM Repair]
    A6 --> D4
    A5 --> D6{Insertion Available?}
    D6 -- Y --> D7{Stock Available?}
    D6 -- N --> D8{Shop Prep Completed?}
    D8 -- Y --> D7
    D8 -- N --> A7[Conduct PM & Key Op]
    A7 --> D9{Problem Fixed?}
    D9 -- Y --> D7
    D9 -- N --> A8[Filtery Bowes fix]
    A8 --> D6
    D7 --> A9[Locate Stock in CDS]
    A9 --> D10{In CDS?}
    D10 -- Y --> A10[Move stock to machine]
    D10 -- N --> A11[Call Vendor]
    A11 --> D11{At vendor?}
    D11 -- Y --> A12[Have Stock Delivered ASAP]
    D11 -- N --> A13[Call Manager for authorization]
    A13 --> D12{Release job?}
    D12 -- Y --> A12
    D12 -- N --> D13{Can stock be used?}
    A12 --> D13
    D13 -- Y --> A14[Insert Bills 5000 bpi]
    D13 -- Y --> A15[Insert Bills below machine]
    A14 --> End1([Complete Bills])
    A15 --> End1
    D13 -- N --> D14{Stock Condition Good?}
    D14 -- Y --> A14
    D14 -- Y --> A15
    D14 -- N --> End1
  
```

```

graph TD
    Start([Start]) --> MockUp[Mock Up ID Cards in Quark]
    MockUp --> ClientApproval{Client Approval?}
    ClientApproval -- Y --> LoadForm[Load Form in Xerox]
    ClientApproval -- N --> MockUp
    LoadForm --> UpdateDUDE[Update DUDE]
    UpdateDUDE --> ClientDataArrive{Client Data Arrive}
    ClientDataArrive -- Y --> RunCRSD[Run CRSD TKT]
    ClientDataArrive -- N --> Hold[Hold]
    RunCRSD --> MetaCode[Metacode w/DUDE]
    MetaCode --> Paperlist[Paperlist Queue by class]
    Paperlist --> DP100avail{DP 100 avail?}
    DP100avail -- Y --> PrintDP100[Print on DP 100 Merge w/ forms lib]
    DP100avail -- N --> ProcessSolmar[Process on Solmar Server]
    PrintDP100 --> IDCard[ID Card]
    ProcessSolmar --> PrintDP50[Print on DP50 Merge w/ forms lib]
    PrintDP50 --> IDCard
    IDCard --> MoveToMail[Move to Mail Ops Output Table]
    MoveToMail --> ReceiveSheet[Receive Instruction Sheet from Documentation]
    ReceiveSheet --> BulkShip?{Bulk Ship?}
    BulkShip? -- Y --> PackShip[Pack & Ship Via UPS]
    BulkShip? -- N --> Collateral{Collateral required?}
    Collateral -- Y --> PutCollateral[Put Collateral RPL, Lenn23, SPDg]
    Collateral -- N --> AutoInsert[Auto-insert on machine]
    PutCollateral --> HighVolume{High Volume?}
    HighVolume -- Y --> AutoInsert
    HighVolume -- N --> ManualInsert[Manual Insert]
    AutoInsert --> BeforeNoon{Before Noon?}
    ManualInsert --> BeforeNoon
    BeforeNoon -- Y --> Meter308[Meter at $0308]
    BeforeNoon -- N --> SameDay{Same Day}
    SameDay -- Y --> Meter309[Meter at $039]
    SameDay -- N --> Meter308
    Meter308 --> SendToPrework[Send to Prework CCS]
    Meter309 --> SendToPrework
    SendToPrework --> USPostal[US Postal Service]
    USPostal --> GoodAddress{Good Address?}
    GoodAddress -- Y --> DeliverMember[Deliver to Member]
    GoodAddress -- N --> ReturnCompany[Return to Company]
    ReturnCompany --> InternalDeliver[Internal Deliver to Call Center]
    InternalDeliver --> NoteReturn[Note return on record, change mail code to #2]
    NoteReturn --> SendToPrework
  
```

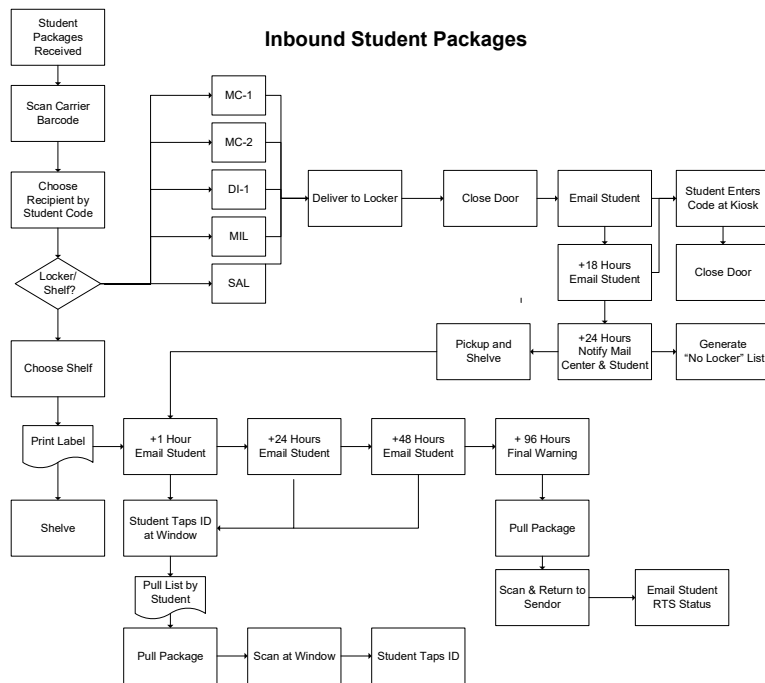


**BERKSHIRE**  
COMPANY





### Inbound Student Packages



27



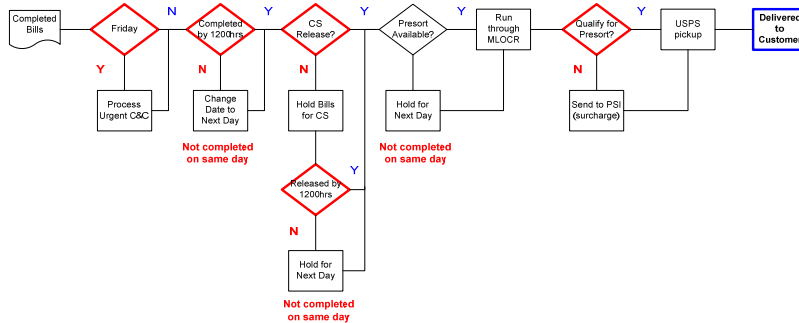
What do you do next?

28



# What Next?

## Corporate Document Services Process - Presort

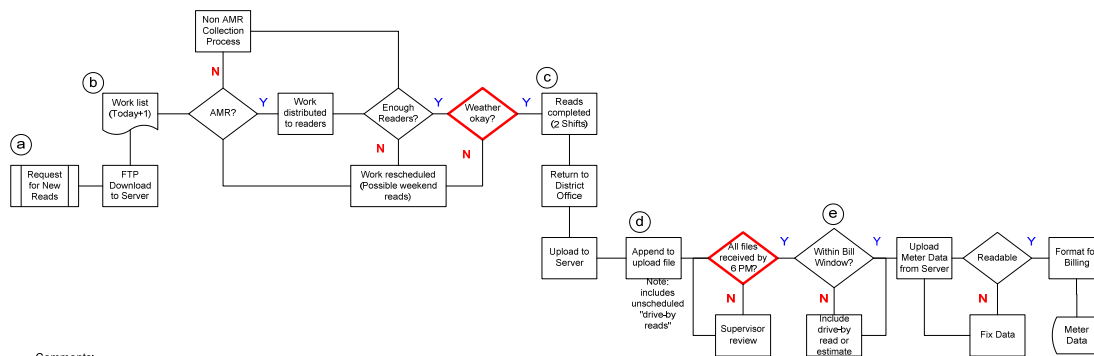


29



# What Next?

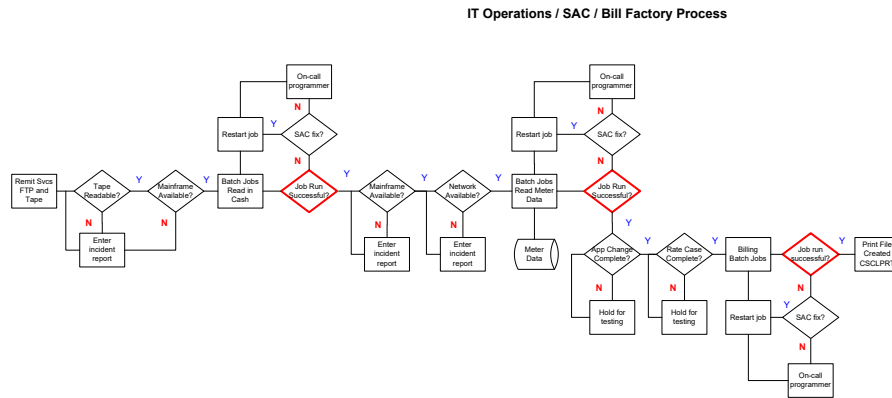
## Meter Read / Customer Service



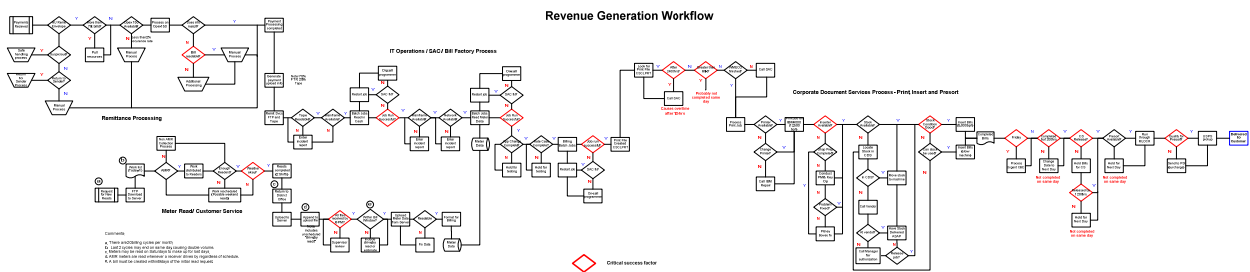
Comments:

- a. There are 20 billing cycles per month.
- b. Last 2 cycles may end on same day, causing double volume.
- c. Meters may be read on Saturdays to make up for lost days.
- d. AMR meters are read whenever a receiver drives by regardless of schedule.
- e. A bill must be created within 9 days of the initial read request.

30



31



32



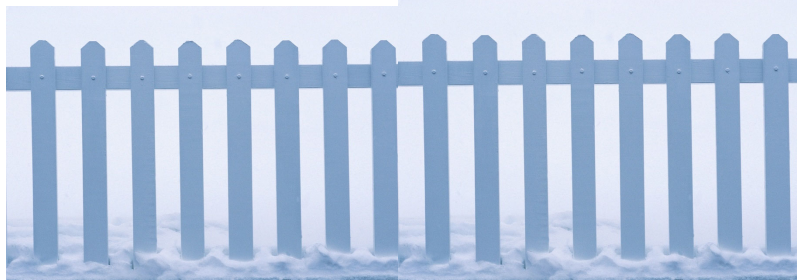
## Critical Factors for Success

33

| <Process Name> |  |
|----------------|--|
| <Function>     |  |
|                |  |
|                |  |
|                |  |
|                |  |

Cross-Functional Flowchart  
(Swim Lane)

34

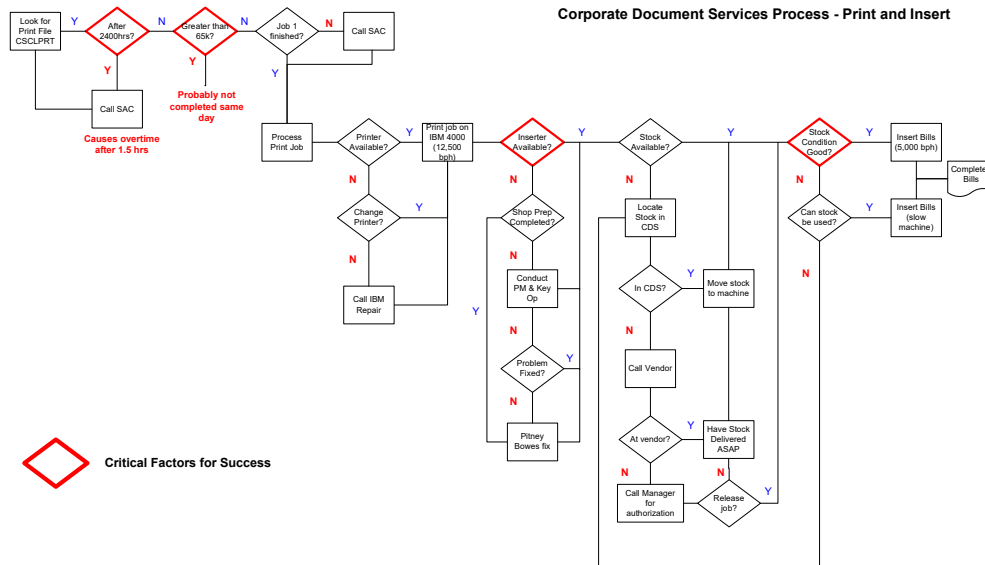


35



## Critical Factors for Success

Corporate Document Services Process - Print and Insert

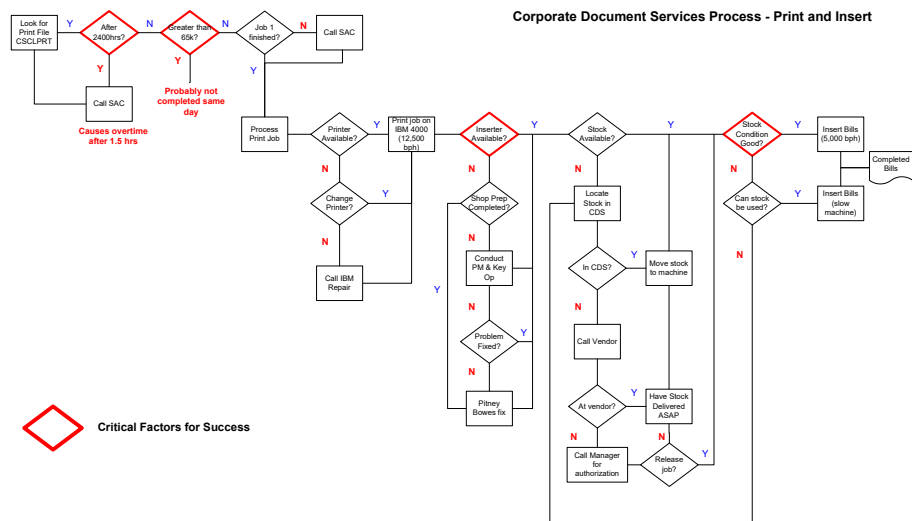


36

## Communication during the process.

37

## Communication



38

# Why?



39


## Overcoming Barriers to Success

40

## What Now?

41

## Workflow

- **Outside the box and inside the loop.**
- **Ask the right questions to the right people.**
- **Why?** A red circle with a diagonal slash through it, indicating that the question "Why?" is discouraged or prohibited.
- **What if?**
- **Critical factors for Success.**
- **Communication during the process.**

42



## Questions?



National Association of  
College and University Mail Services

### Mark M. Fallon

President & CEO, The Berkshire Company

Visit: [berkshire-company.com](http://berkshire-company.com)

Email: [mmf@berkshire-company.com](mailto:mmf@berkshire-company.com)

LinkedIn: [Mark Fallon](#) Instagram: [mmfallon621](#)

43



## About The Berkshire Company

An independent management consulting firm, The Berkshire Company specializes in improving your business process, including analyzing your operation, developing and selecting solutions, and providing project management.

Since 2001, the Berkshire Company has helped more than 80 organizations improve their operations with:

- Process Evaluations & Improvements
- Strategy Development
- Project Management
- Outsource vs. Insource
- Mail Center Security
- New Technology

Learn more at: [www.berkshire-company.com](http://www.berkshire-company.com)

44