



Workflow Management and Process Mapping

Operational Excellence in Insurance Summit

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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.

The Berkshire Company has helped more than 75 organizations improve their operations with:

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

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What is “workflow management”?



What is “process mapping”?



Thinking outside the box and
inside the loop.



Messaging

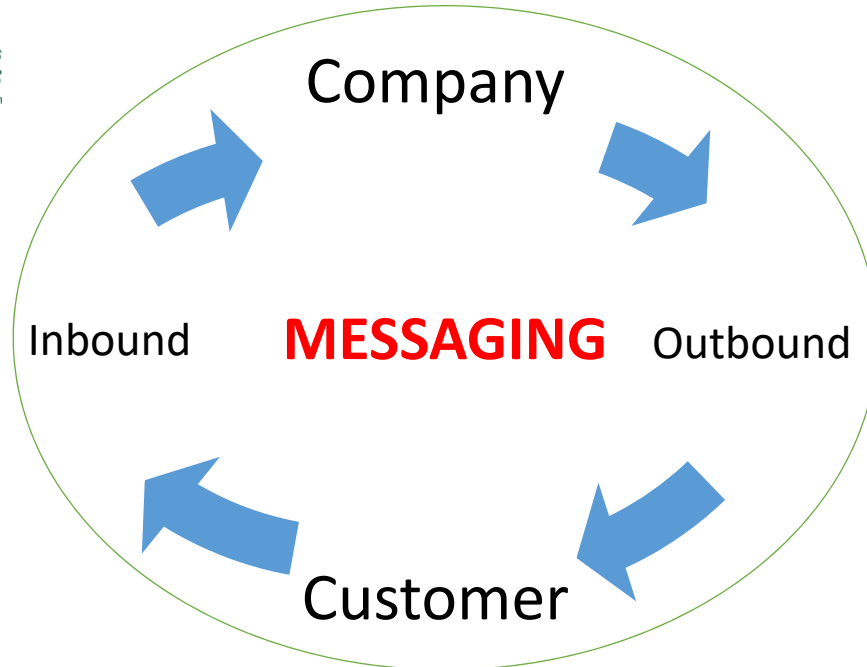
Data File

Print File

Print

Finish

Post



Who do you need to involve?



What information you need?



How do you get the information you need?



Ask the right questions:

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



The wrong question:

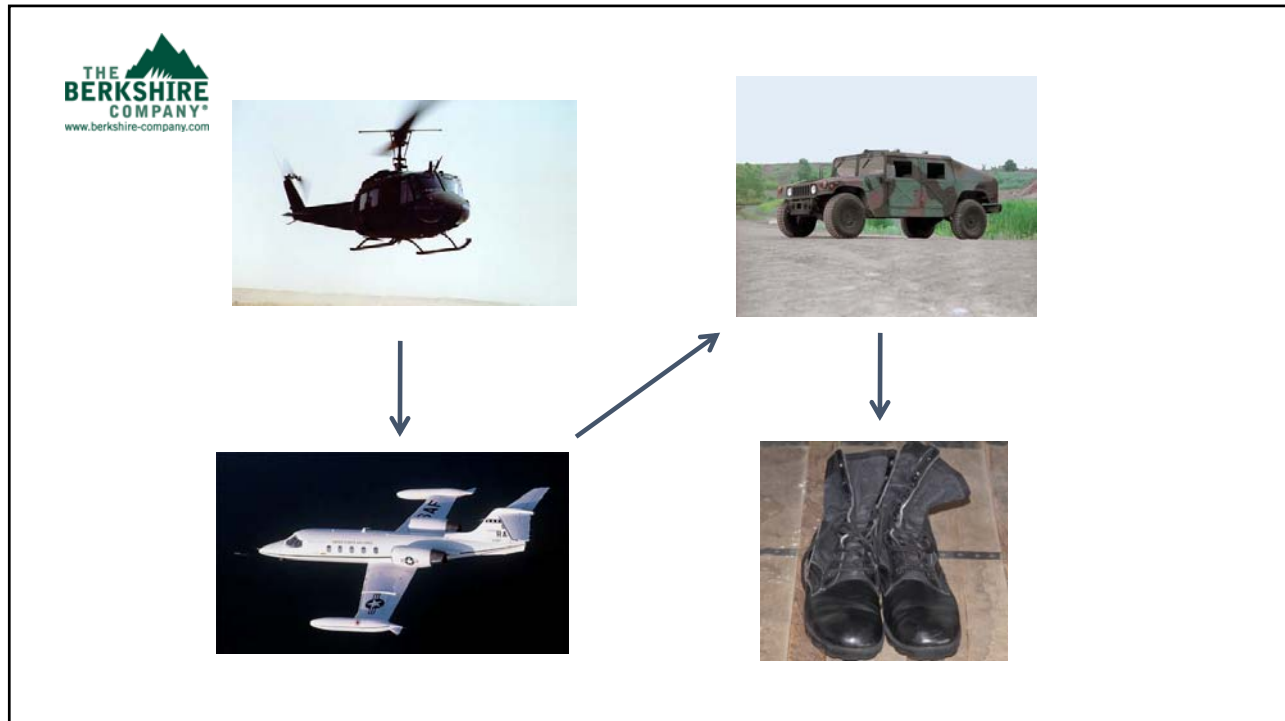




A really good question:

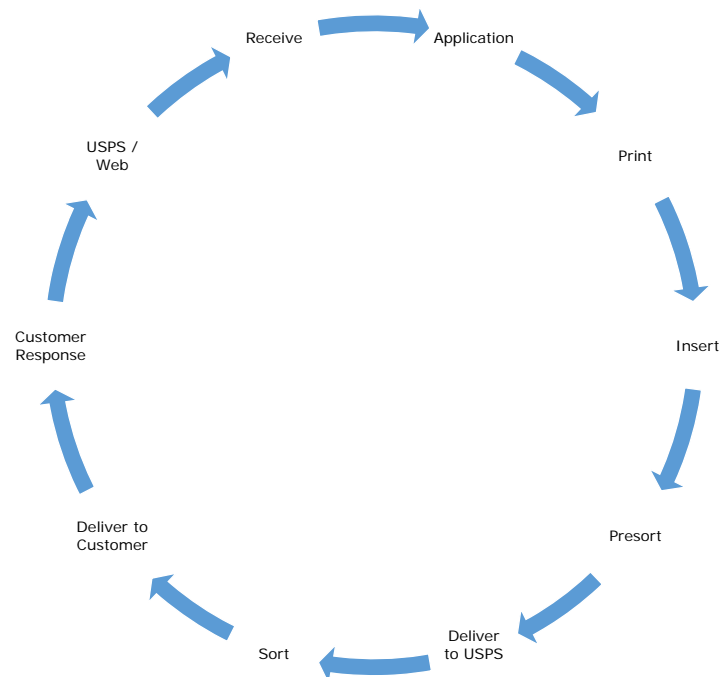
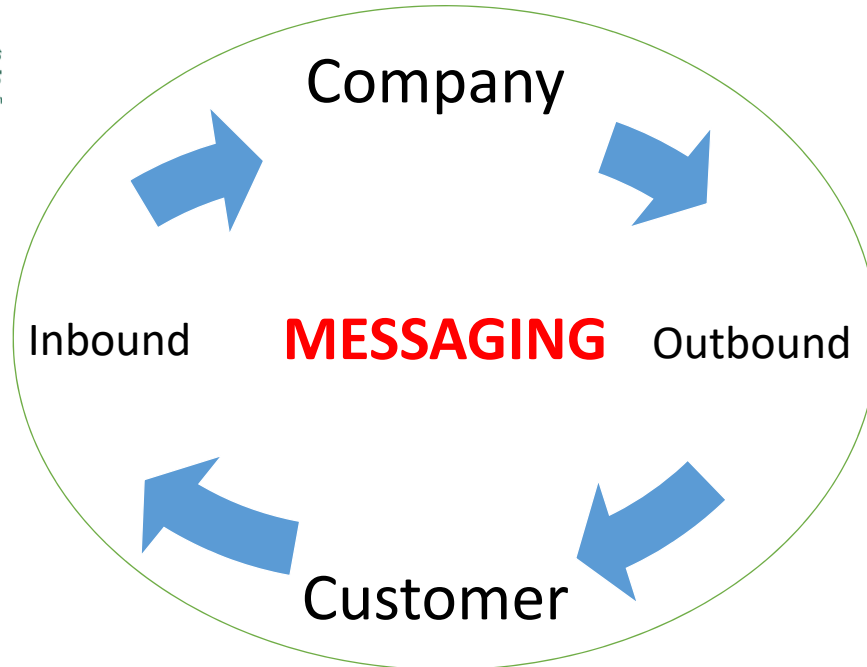
What if?





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How do you map out the process?





Examples: Definitions of Shapes



This shape means a process.



This shape means a predefined process.



This shape means a decision point.



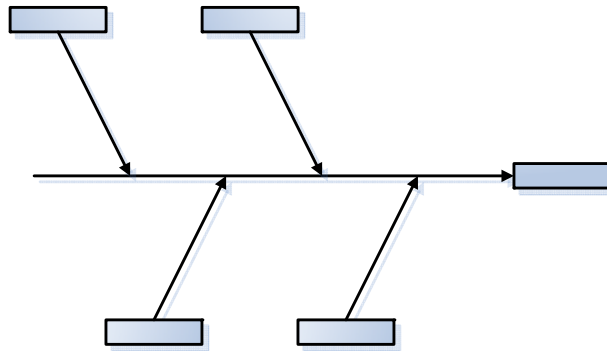
This shape means a preparation.



This shape means a manual operation.



This shape means a document.



Cause and Effect Flowchart

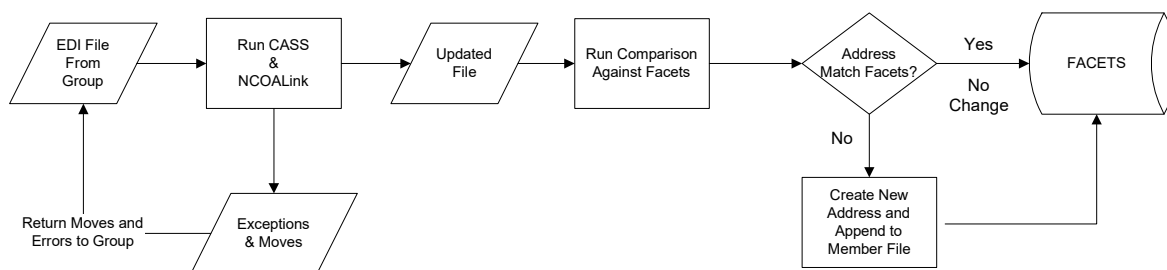


<Process Name>	
<Function>	
<Function>	
<Function>	
<Function>	
<Function>	

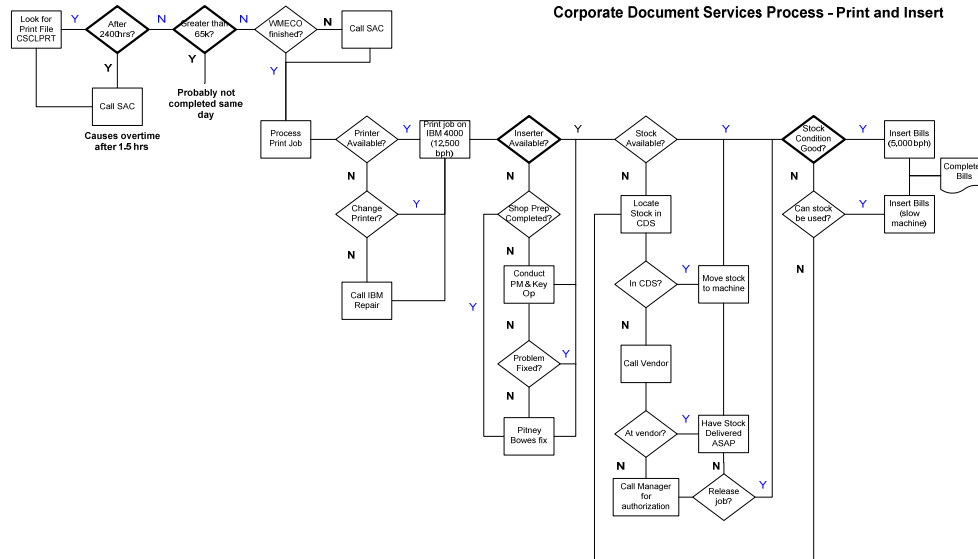
Cross-Functional Flowchart
(Swim Lane)



Basic Flowchart

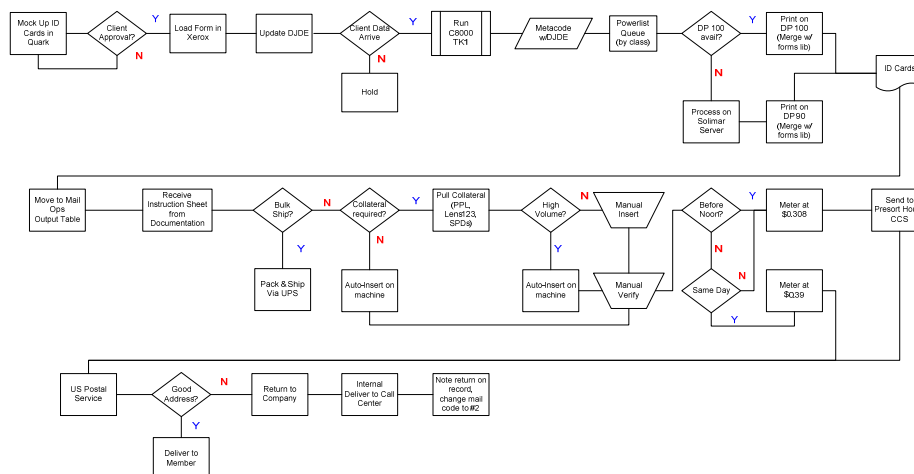


Examples



Examples

ID Cards Processing – New Group

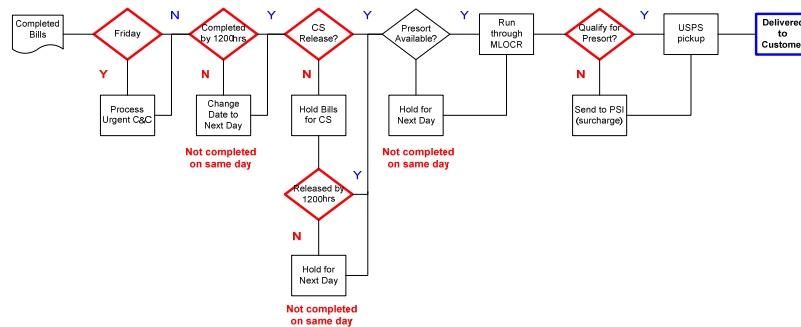




What do you do next?

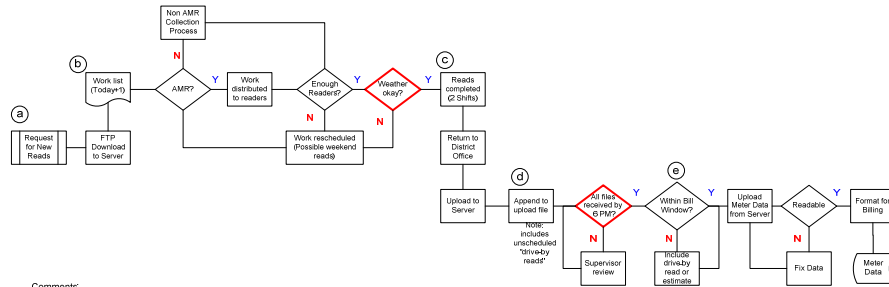
What Next?

Corporate Document Services Process - Presort



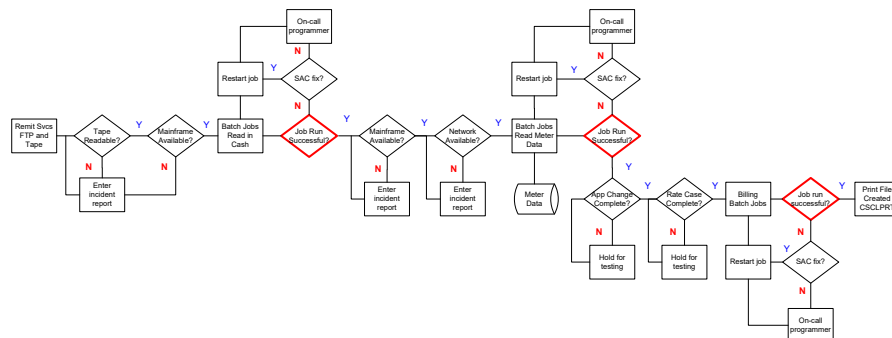
What Next?

Meter Read / Customer Service

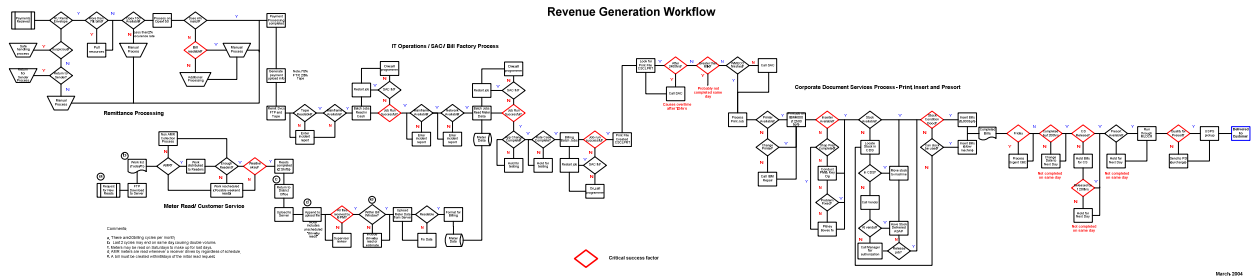


What Next?

IT Operations / SAC / Bill Factory Process



What Next?



Critical Factors for Success

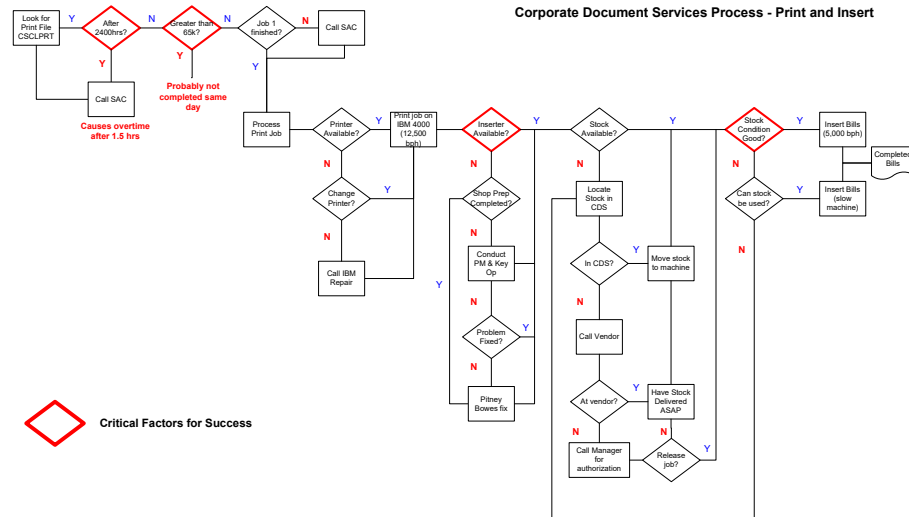


<Process Name>	
<Function>	

Cross-Functional Flowchart
(Swim Lane)

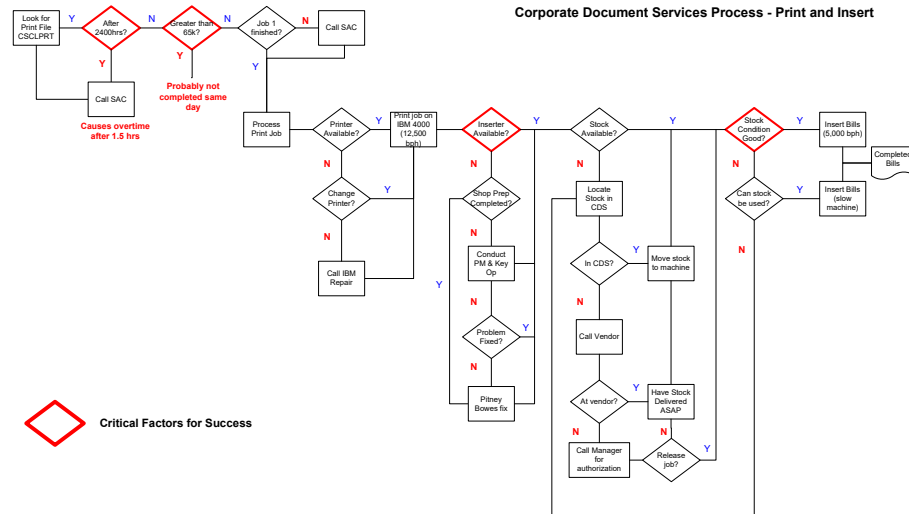


Critical Factors for Success

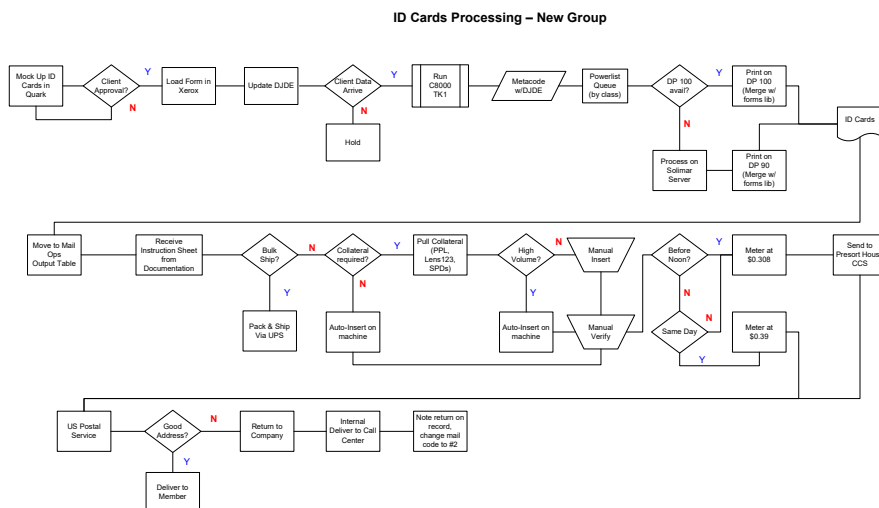


Communication during the process.

Communication

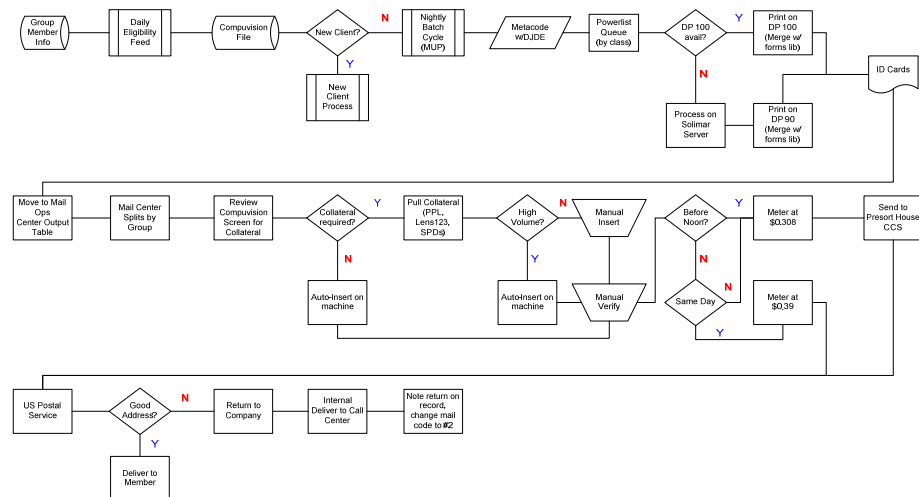


Why?



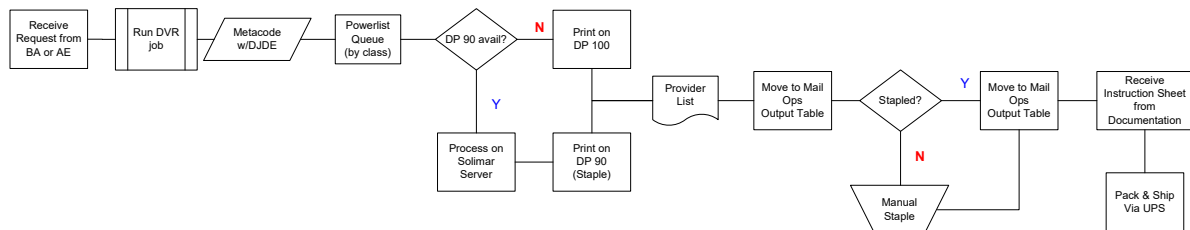
Why?

ID Cards Processing – Nightly Batch



Why?

Provider List – Non-Personalized



Why?



Overcoming Barriers to Success



What Now?



Workflow

- Outside the box and inside the loop.
- Ask the right questions to the right people.



- What if?
- Critical factors for Success.
- Communication during the process.



Questions?

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Practical Exercise

You and a companion live together. The two of you have just returned to Atlanta from San Francisco, finishing a 10-day trip that involved both business and vacation travel. You arrive home Friday night at 10:00pm, and get a message that the two of you have 2 days to prepare for a similar trip. You're scheduled to be on a flight leaving Atlanta on Monday morning at 6:00am to fly to Ljubljana, Slovenia for a week visiting clients and enjoying touring along the river.

Map out your process from unpacking to repacking your luggage.