Flowcharting Instructions

Introduction
A flowchart is a tool that breaks down a process into individual steps, activities, or events and shows the logical relationship between them. The step, activities, or events are ordered from beginning to end. Flowcharting allows an individual or team to study an existing or new process to better understand each step and identify where improvements can be made. The goal is consistency and as little variation as possible from person to person. Flowcharting is an effective tool during root cause analysis. When developing a flowchart always include persons who have knowledge of the process being discussed. A flowchart:

- Facilitates the team’s understanding of the steps in a process
- Highlights points where decisions need to occur and what are the decision outcomes
- Promotes understanding of whether a process occurs in one or multiple ways
- Promotes systems thinking regarding how work consists of interacting steps
- Provides visualization of complexity, problem areas, and rework
- Provides insight to potential simplification, elimination of unnecessary steps, and standardization of the process

How to Develop a Flowchart
Flowcharts are developed using shapes to diagram the types and flow of steps, activities, or events in a process. Use these shapes to represent different types of steps or actions in the process. Using large poster sheets with sticky notes for process steps or writing on a whiteboard can help.

- The beginning and end of a process
- A task or activity in the process
- A decision point, for example yes or no
- Direction or flow of the process
1. To draw the flowchart, brainstorm the steps in the process and list them in the order they occur. Ask questions such as, “What happens next in the process?”, “What really happens?”, and “Does a decision need to be made before the next step?”

2. Fill in the shapes with each step and decision made in the process.

3. Link them together using arrows to show the flow of the process and the order they occur.

4. At decision points, there are typically two decision outcomes, yes/no or true/false. Follow the decision point with the process as it would be performed as a result of the decision.

5. If the process occurs in multiple ways – for example, different people or work areas do things differently – you may want to flowchart each process as it occurs.

6. Look for breakdowns in the processes and where variations occur.

7. Review the flowchart. Work through each step identifying where improvements can take place, where work is duplicated, whether additional steps are needed, or whether steps can be simplified.

8. Use the same steps to identify the new improved process. Talk through each step with the team, identifying the best process.