

VIS-IT™ FLOWSHAPES™ USER GUIDE

Dramatically Improve Organizational Processes

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FLOWCHARTING with FlowShapes™ Overview

The VIS-IT™ method for flowcharting uses VIS-IT Flowshapes™ to accurately represent business or work processes in order to:

- Help teams determine and capture the activities of a process
- Visualize opportunities for dramatic process improvements, and]
- Help team members learn the correct processes.

FlowShapes™ replicate the nine ISO 9000 symbols that commonly represent the distinct elements or activities of a work process. Each of the standard nine shapes is a die-cut, color-coded Post-it™ note. There are 100 sheets per pad. Jumbo FlowShapes™ pads are also available, where each of the color-coded shapes are reproduced on large 8.0”w by 6.0”h Post-it™ notes pads, of 25 sheets.

The foundation concept behind the Flowcharting with FlowShapes™ method is that each distinct part or “activity” of a process can be represented as an “idea object”, which can be captured and represented in words written on a FlowShapes sticky note. Once identified, each part of the process can then be evaluated for its value-add contribution to achieving the purpose of the process being examined. Activities or elements that do not add value are then re-engineered out of the process.

DECIDE WHAT PROCESS TO EVALUATE AND IMPROVE

The VIS-IT Flowcharting method offers the following definitions:

Process (top level): These are the few “high level” processes required for the organization to operate successfully for an extended period of time. In a manufacturing firm these might include: *selling, fulfillment, marketing, R&D, and administration.*

Subprocess: These are the distinct sequential components of a top-level process. For example, a subprocess of the selling process might be the *new customer acquisition process* followed by another subprocess, *the relationship management process.*

Process activity: An activity is a distinct step or occurrence in a process or subprocess, usually associated with an organizational function, that yields a particular, detectable result. Activities are the subjects of flow diagramming. FlowShapes™ are used to sequentially depict distinct individual activities of a process or subprocess.

DECIDE WHAT DIAGRAM TYPE TO USE

The type of process flow diagram a team decides to create will depend on the chart's purpose and on the degree of detail required to achieve that purpose.

The **block diagram** is intended to communicate a quick, simple picture of a process showing its principal subprocesses or activities. The most frequently used FlowShapes™ for block diagrams are boundary, operation, and decision. (See Fig. 1 below) Note the relevance of the diagram to this User Guide.

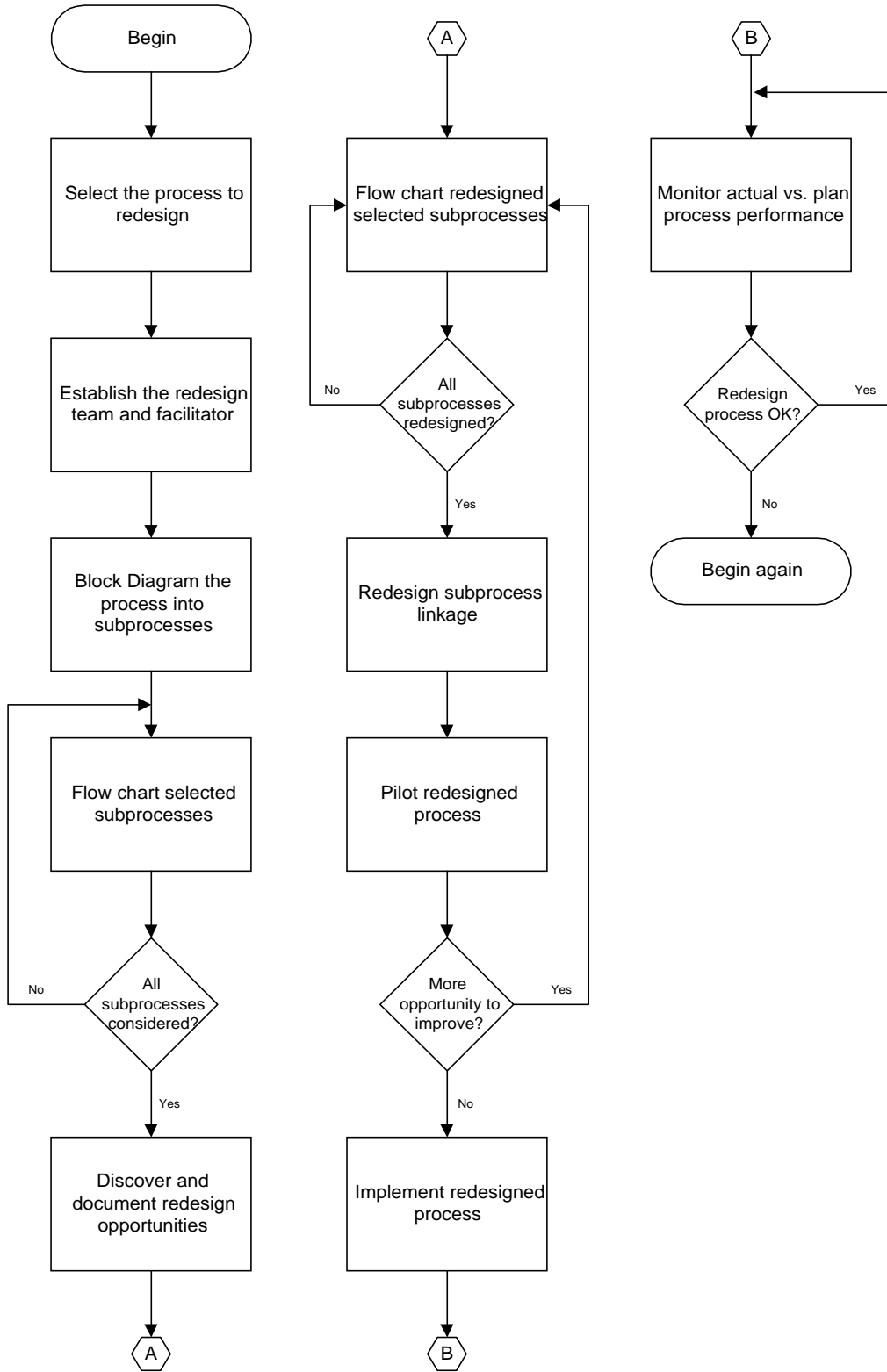


Figure 1: The Block Diagram

The **standard flowchart** is used to illustrate, in useful detail, the sequential activities of a process. It is used to discover opportunities for process improvement or as a process-training tool. The standard flowchart uses the full complement of FlowShapes™. The recommended VIS-IT Flowcharting method is documented in the standard flowchart shown below. (See Fig. 2 below)

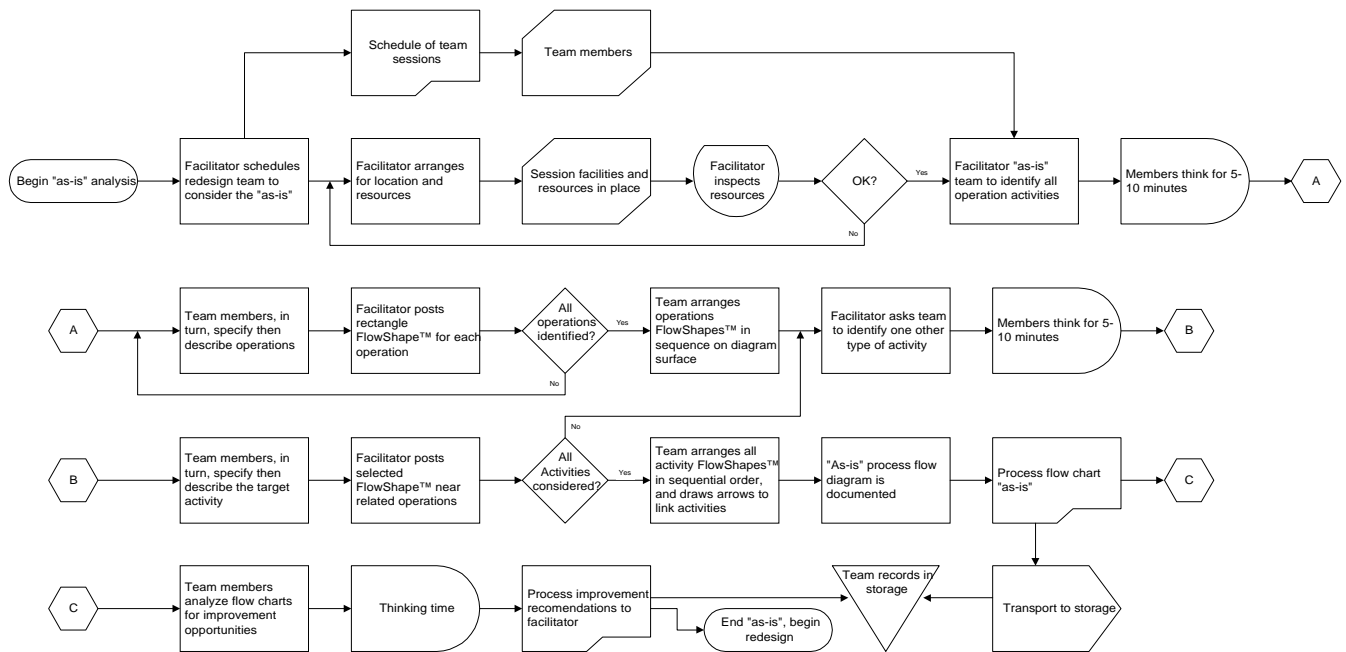


Figure 2: The Standard Flowchart

A variation called the **functional flowchart** may be in either the block diagram or standard flowchart format; however, the FlowShapes™ symbols are positioned in distinct, adjacent channels, one for each functional entity (department) involved in the process.

GETTING STARTED: Using FlowShapes™ with teams to improve organizational processes


Agree to begin with a process where significant improvement will yield dramatic, high leverage payoffs. Next, form a “process improvement team” including members who can effectively represent the knowledge and interests of the processes’ stakeholders. Then, appoint or engage an objective facilitator to guide the thinking process.


The workspace where the flowcharting work will occur should be sufficiently large for the team to interact with each other. Because the FlowShapes will be posted on large flip chart paper sheets that are taped together, or on white butcher paper, a large amount of wall space should be available.


AGREE ON WHAT THE SYMBOLS MEAN


The table below presents the FlowShapes™ Symbols and their meanings. Each FlowShape is large enough for several words to describe the specific activity, plus make reference to supporting reference documents. In Table 1 below, we suggest the type of words that might become the first word of each activity. For example, a process operation activity might be stated as “Sell Optional Equipment”. Table 2 offers ideas on how to use other VIS-IT™ hexagons products as part of the documentation work. Table 3 illustrates how to connect the activities.


Table 1: FLOWSHAPES™ ACTIVITIES: MEANINGS & SYMBOLS


 **Boundary:** *elongated circle (light pink)*. This shape signals the beginning or end of a process. Use words like *start, stop, beginning, or end*.

 **Process Operation:** *rectangle (green)*. This shape indicates a process activity resulting in a change to/in something. Begin the operation description with action verbs like *design, sell, produce, assemble, serve, create, write, buy, or other action verbs*.

 **Decision:** *diamond (neon orange)*. This shape, a square with “points up” is used to indicate a decision making step in the process. Use words to *ask if a condition is true*, i.e., “Does result meet the goal?” where a “yes” or “no” will direct the flow to alternative process steps.

 **Input or Output:** *box (cream)*. This shape identifies either (a) an external, non-document input (material, money, or other resources) to a process activity, or (b) a non-document output from an activity. Label the shape with a *noun* descriptor of the input or output

 **Document:** *rectangle with corner missing (white)*. This shape identifies a paper or electronic document or report containing information that is meant to be read and acted upon, referenced, or stored. Label the shape with the *common usage title* of the document.

 **Transport or movement:** *fat arrow (yellow)*. This shape denotes a transport activity in the process where no change occurs except for location. Begin with action verb: i.e., *ship, mail, deliver, carry*, followed by the thing(s) being moved, and then by the means of transport, i.e., “Ship product by truck.”



Inspection: *flat-top circle (blue)*. This shape identifies an activity in the process where someone other than the operator interprets the process to evaluate the quality of a prior process activity. Begin phrase with the name of entity performing inspection followed by an action verb: i.e., *inspects, checks, evaluates, examines, measure*, etc.



Delay: *d-shaped rectangle (neon pink)*. This shape indicates a halt in the process where a person or thing must wait, or be placed *on hold* or in *temporary storage*, before the next process activity is performed. Begin the phrase with a verb like *wait, stop, delay, set aside* followed by the name of the next process activity, i.e., “wait to approve by supervisor.”



Storage: *triangle (neon lemon)*. This shape represents a controlled storage condition, as when output of the prior process activity is in storage waiting for a customer. Use words like *store, inventory, stock*, as in “store awaiting sale.”

Table 2: AUXILIARY VIS-IT™ MEANINGS & SYMBOLS

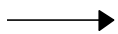


Connector: *small circle (suggest either a drawn circle or a VIS-IT™ Mini hexagon)*
Connects one part of a process flow with another when the full process cannot be documented on one piece of paper. Use letters inside the circle to reference the connecting point in the associated process flow. Draw arrow link either from or to the connector.

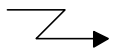


Issue, Idea, or Opportunity: *large six-inch VIS-IT™ hexagon*. Use a large hexagon as a “thought bubble” connected to a specific step in the process to capture an important related idea. A neon pink hexagon might suggest a risk or external threat; a yellow hexagon might signal an opportunity.

Table 3: WRITTEN SYMBOLS



Process flow direction: *arrow with filled in head*. Draw these arrows to define the direction and sequence of the steps of a process.



Immediate information flow: *arrow with “z-hitch”*. Use this symbol to identify e-mail, fax, telephone, or another form of immediate transmission of information.

CREATE THE INITIAL BLOCK DIAGRAM

Create a **block diagram** of the selected process to determine the scope of process steps that will be initially considered (see Figure 1 for an example). The facilitator might ask: “What are the important subprocesses or operations involved in this process?” and

then allow the team members to individually reflect on this question quietly for five or ten minutes while they write down those parts of the process. Following this thinking time, the facilitator asks each member, in turn, to name one subprocess or operation not previously identified by another member of the group. The activity (usually either an operation or a decision) do not need to be named in sequential order. The activities are documented on the appropriate FlowShape™ and positioned as they are offered on a white board or equivalent diagramming space.

After the team determines the full range of process steps, the FlowShapes™ would then be arranged and connected in sequence by drawing flow direction arrows. The work would be documented by software with process diagramming capabilities.

Repeat the block diagramming process described above for each subprocess or operation identified in the initial block diagram.

CREATE STANDARD FLOWCHARTS FOR DIAGNOSIS AND REDESIGN

Following the block diagramming work, use a prioritization technique to select a process or subprocess for which to begin to create a **standard flowchart** in order to diagnose and document meaningful process improvement opportunities (see Fig. 2 above). After the process has been selected, the facilitator will guide the team's examination of the "as-is" steps in the activity.

Vision Works recommends that the facilitator ask the team to think, in turn, about each *type* of process activity or task represented by each distinct FlowShape™. For example, the facilitator would first ask: "What are the distinct operations that occur in this process and therefore should be identified on a green rectangle FlowShape™?" After allowing the team members to reflect on and, in turn, explain their answers, the facilitator writes the activity description on the selected FlowShape™ and sticks it onto the team's diagramming space.

Next, the facilitator might ask: "What are the distinct decisions that occur in this process and should be shown on neon orange FlowShapes™?" and then repeats the step of collecting the team's non-duplicated answers. This same approach is used until all process element types, represented by the nine FlowShapes™ type are discovered. Team members can, of course, add activities that were forgotten earlier in the session. Special effort is put on discovering delay and storage elements because they often provide the best opportunities for reducing process cycle time.

After all of the target process activities have been identified by the team, they are arranged in sequential order and connected by drawing arrows to indicate process flow direction and information transmission.

When teams work together with FlowShapes™, Vision Works recommends the diagramming be done horizontally, from left to right, as in a diagram of a "value chain."

Functional channels, if used, can be arranged vertically and cycle times summed from top to bottom.

REDESIGN BY ELIMINATING NON-VALUE-ADD ELEMENTS

The challenge of process improvement is to eliminate as many non-value-adding and time consuming elements as possible, especially delays, inspections, in-process storage or transportation. Further, ask questions like: “What inputs can be eliminated or combined? What documents could be eliminated or combined? What information flows could be combined or accelerated?”

ABOUT VISION WORKS

Vision Works, LLC is the creator of the VIS-IT™ Line of facilitation and thinking tools including FlowShapes™, 6” Hexagons, Jumbo Hexagons, Mini Hexagons, Big Idea Pads, and the Great Big Idea Pad. Vision Works serves a rapidly growing customer base including facilitators, trainers, consultants, managers and executives working in some of the world’s largest and most innovative organizations.

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