

Process Mapping Kickoff Guide

A One-Page Guide to Align Leadership and Process Design

How to Use This Guide

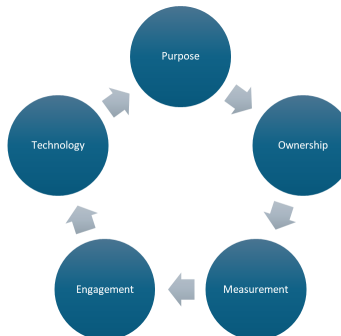
Use this checklist before launching a process-mapping session to ensure clarity of scope and ownership.

Why Start With Intent

Process mapping creates the greatest value when it clarifies decision-making, ownership, and performance — not when it simply captures workflows. Use this guide to set the right foundation before your team begins.

Typical Triggers for a Mapping Initiative:

- Repeated delays or rework
- Conflicting reports across departments
- Upcoming automation or ERP upgrade
- Organizational restructuring or new leadership



Practical Tips

Effective mapping can begin with whiteboards or digital tools such as Miro, Lucidchart, or BPMN-based software - provided the intent is clear.

Whether you use BPMN notation or a simple swimlane map, start by defining ownership and decisions first.

Once the process is defined and stabilized, data-driven tools such as process mining can validate performance and pinpoint improvement opportunities.

Kickoff Checklist

1. Define the Purpose

- What business objective does this mapping support?
- Which decisions will this process inform?
- What problem are we trying to solve?

2. Clarify Ownership

- Who owns the outcome (not just the documentation)?
- Which departments are accountable vs. consulted?
- How will ownership be sustained after the session?

3. Establish Measurement Criteria

- What does “improvement” look like?
- Which KPIs will confirm success?
- How will we track impact over time?

4. Prepare for Engagement

- Have all stakeholders been identified and briefed?
- Do they understand *why* the mapping is being done?
- Is there agreement on scope and boundaries?

5. Align with Technology

- Which systems or data sources support this process?
- Are integration points clear and realistic?
- Will insights be used for automation, reporting, or redesign?