



# Using Process Mapping to Save Time and Money

Welcome! In the chat, please share your name and what government you represent.

## 1. Part 1: Overview of Procurement Processes

- What are some of the procurement problems governments typically face?
- What a good process could mean for your government

## 2. Part 2: Understanding and Building a Process Map

- What is process mapping, and why is it useful?
- Breakout Room Activity: What is slowing down the process in Citylandia and how would you improve it?
- How can we diagnose and improve the process?

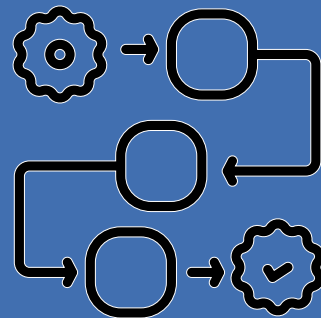
## 3. Part 3: Moving from Documentation to Change

- How do I use my process map to diagnose and solve procurement efficiency challenges?
- Breakout Room Activity: Improving the Process in Citylandia
- How can I help my internal and external stakeholders understand a process?
- How have governments used process maps to cut cycle times and reduce waste?

## 4. Additional Resources

# Overview of Procurement Processes

## Part 1



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What are procurement process  
problems governments typically  
face?

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# What tends to slow procurement down?

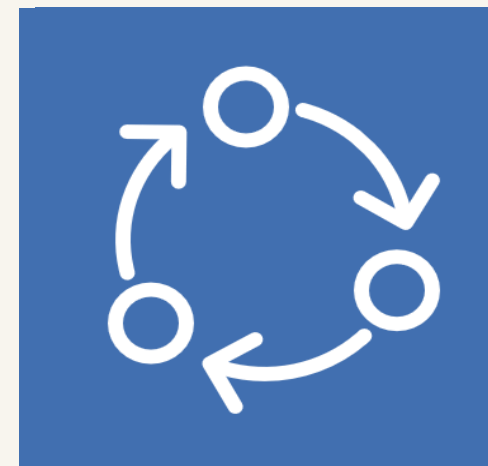
- **Redundant, unnecessary and dated compliance measures** such as excessive rounds of review and administrative requirements.
- **Lack of clarity and collaboration among staff** leads to unclear role delegation that causes confusion between purchasing and programmatic staff.
  - Can lead to poorly written RFP's which leads to more questions, addendums and poor proposals from vendor community.
  - Lack of consistency for many steps of the process
  - Staff don't understand how to initiate a buying process
- **Understaffed procurement offices** focus on putting out fires (i.e., churning out requisitions) rather than planning ahead

**A confusing, burdensome procurement process can crowd out important strategic thinking around what goals and outcomes a new contracted service or program should achieve.**

# What a good process could mean for your government

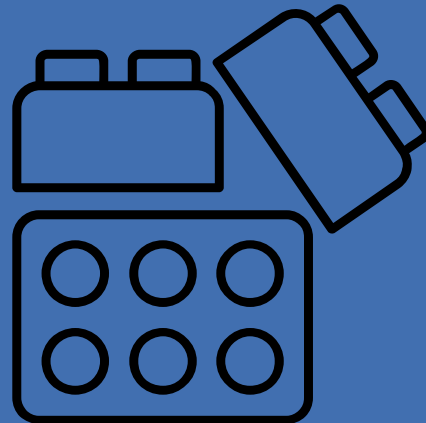
- Less time spent on administrative activities and more time on strategy and planning.
- A clear set of steps that everyone understands – from vendors to department program staff.
- Roles that ask for the right inputs from the right people at the right time.
- A consistent, predictable experience for all involved

**Efficiency is the foundation for procurement transformation**



# Understanding and Building a Process Map

## Part 2



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# What is process mapping, and why is it useful?

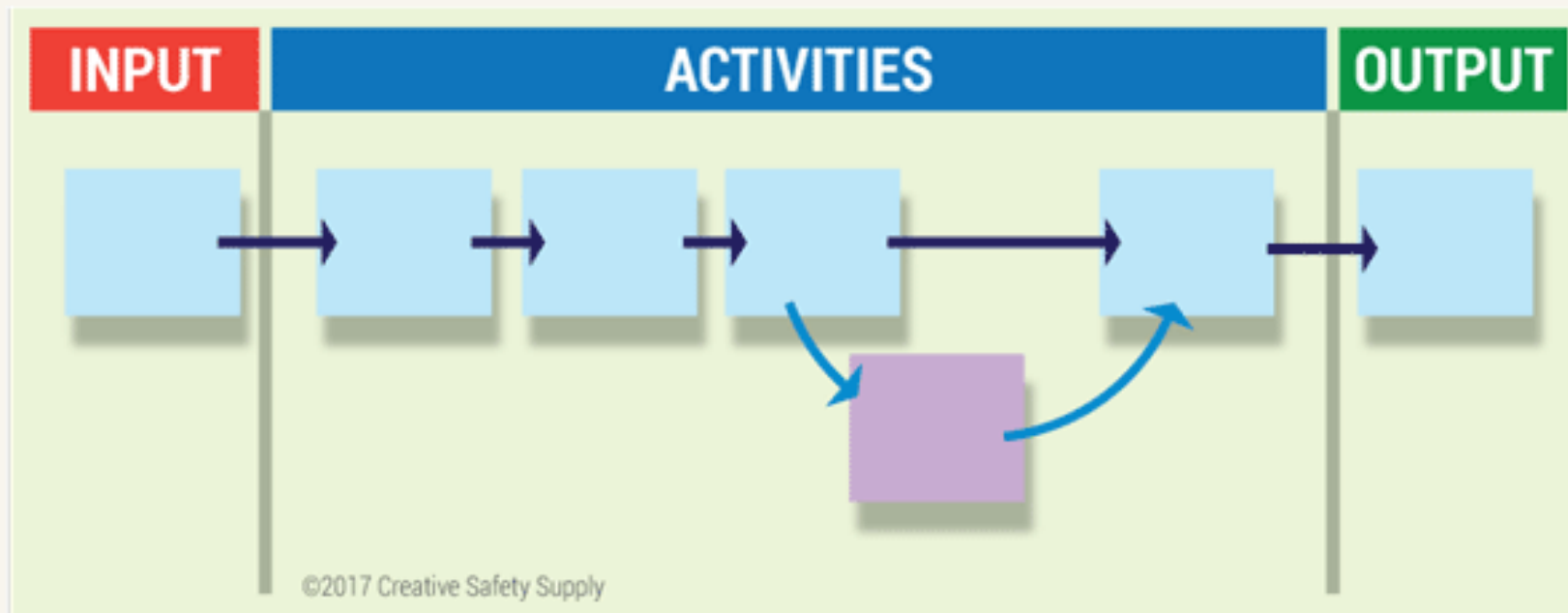
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# Process Mapping: A Powerful Diagnostic Tool

## What is a process map?

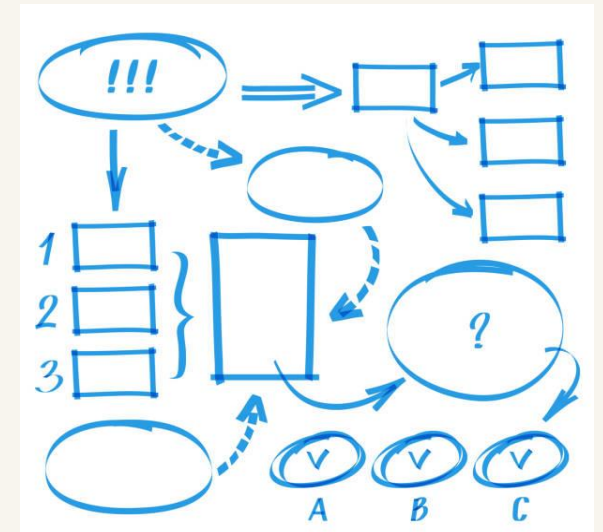
A diagram that visually displays a series of steps that occur within a given process, often used as a tool in continuous improvement efforts. Each step includes the people involved and the resources required.



# How can a process map be used?

## A process map can be used to:

- Gather information
- Generate consensus
- Reduce waste
- Identify gaps or overlaps
- Design a new process or improve upon an existing one
- Facilitate prioritization or strategic alignment



# Why does process mapping matter?

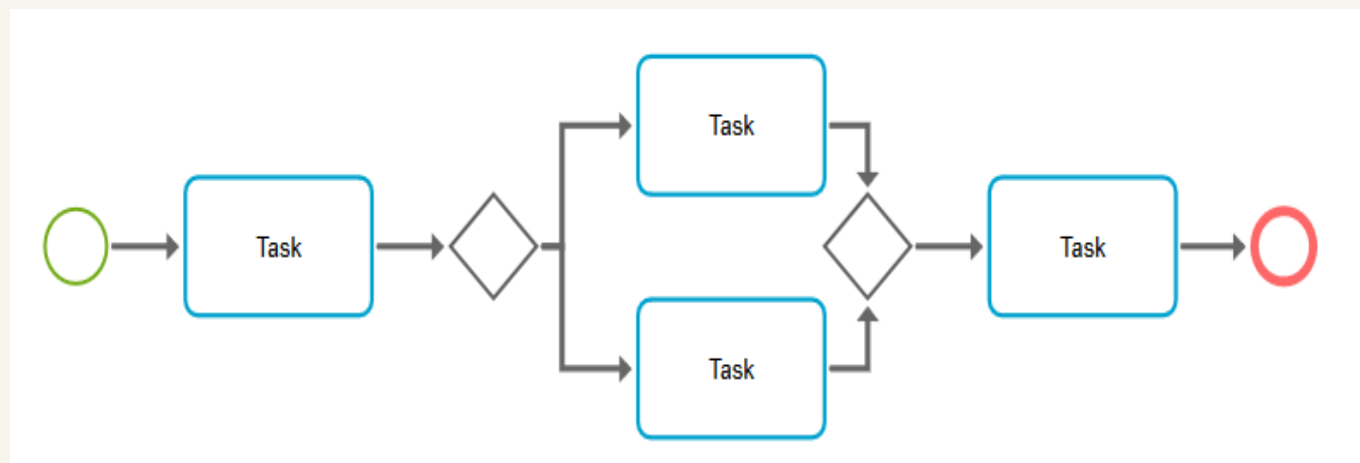
*Beyond helping us simply understand processes, process mapping can further other important goals for purchasing offices, such as:*

- **Securing buy-in** on process improvement and **elevating the strategic importance of procurement** by bringing key stakeholders together and collaboratively identifying slowdowns and roadblocks.
- **Identifying areas of confusion**, or misunderstandings of policy that can be addressed through better communication and guidance.
- **Communicating with the public and vendors** about procurement processes and demystifying procurement.

Remember: your first process map will depict **current** reality, NOT an ideal state.

# What form does a process map commonly take?

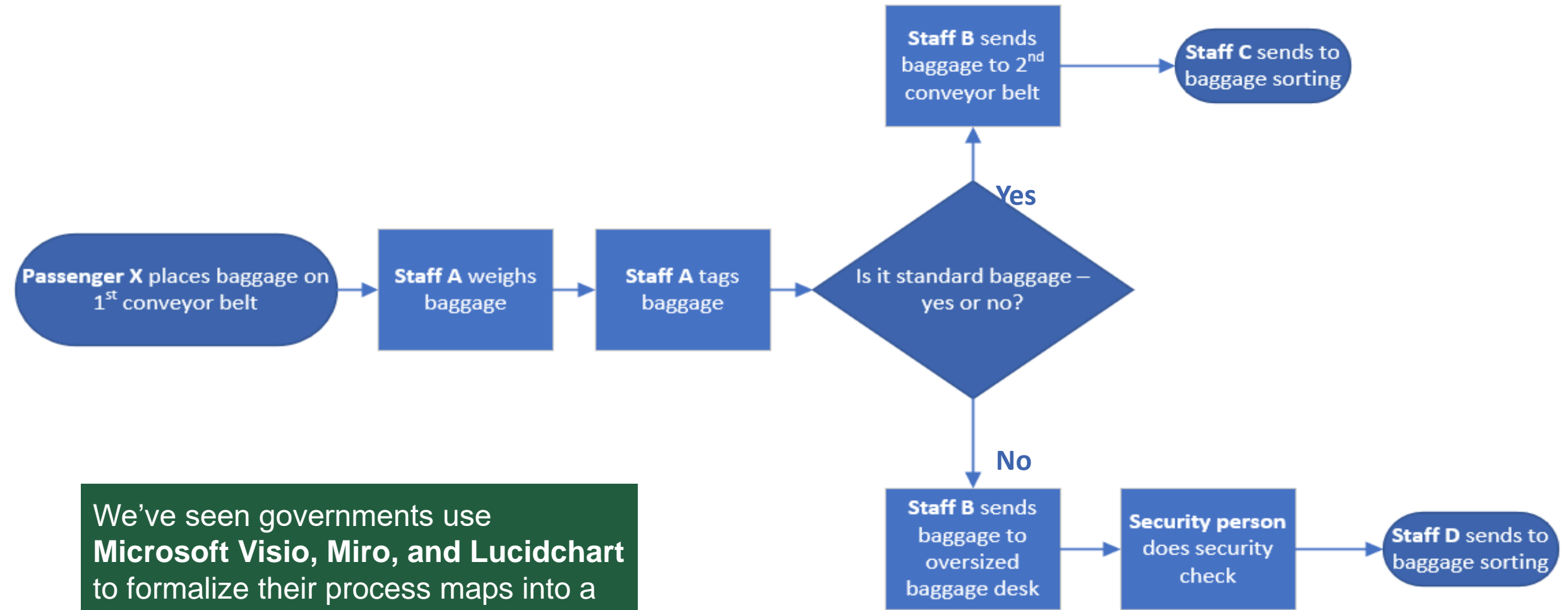
Typically, a process map is a **flowchart**: a series of shapes and arrows that signify different types of steps in the process. It moves from left to right and each shape identifies an actor and what action that person takes.



## Rules of Thumb

- Reads from left to right.
- Boxes = steps in a process.
- Diamonds = decisions (yes/no, if/then).
- Set clear actors for each box: X does Y.
- Don't get caught on exceptions to the rule. Focus on what is usually the case.
- **Remember:** give the 30,000-foot level of detail, not the microscopic level!

# Flowchart Example: Airport Baggage Handling



We've seen governments use **Microsoft Visio, Miro, and Lucidchart** to formalize their process maps into a flowchart.

# Is a flowchart the only way to draw a process map?

Not at all! **Spreadsheets** are another format to consider, especially if you need to conduct your process mapping session virtually.

Citylandia Procurement Process Map  
(process you choose to map)

STAGE	STAGE #	STEP #	STEP DESCRIPTION	OWNER
What's the overarching stage of the process (e.g., solicitation development, bid evaluation)			Where you write each step. The format should be "X actor does Y action." Make sure to note any resources required too.	Who (or in some cases what department) does the step
	II	5	converses with Department as necessary to confirm edits and pending attachments to ensure compliance.	Buyer
			Highlighted rows/steps indicate a decision point.	
	III	16	Example: Do vendor questions or comments warrant adjustments to SOW, specifications, description, and/or price?	Buyer (as she is making the determination)

## Rules of Thumb

- Steps flow from top to bottom.
- Each row is a step. Highlighted rows are decisions. (Note: branching logic is a little harder to capture on a spreadsheet.)
- Columns can illustrate step order, step descriptions, and actors.

# Spreadsheet Example: Bid Evaluation for Formal Contracts

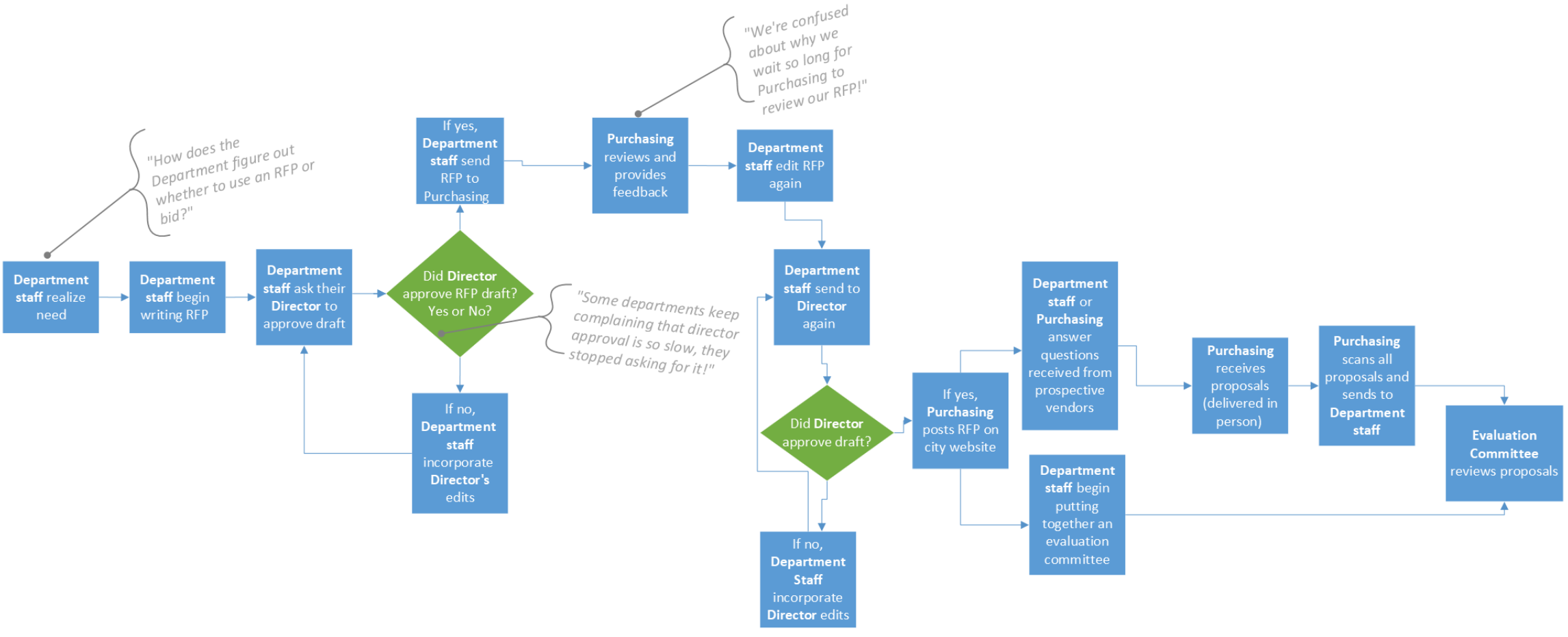
Citylandia Procurement Process Map (Formal Competitive Process)			
STAGE	STEP #	STEP DESCRIPTION	OWNER
IV. Bid Evaluation	3	Purchasing administrative assistant sends copies of opened bids/proposals to buyers.	Administrative Assistant
	4	Purchasing administrative assistant creates summary of opened bids/proposals and posts summary to Citylandia purchasing website.	Administrative Assistant
	5	Buyer adds opened bids to contract folder on Purchasing shared drives.	Buyer
	6	Buyer reviews bids/proposals and confirms they meet specifications and requirements.	Buyer
	7	Was the solicitation an IFB or an RFP?	Buyer
	8A	RFP - Buyers share all proposals with departments/evaluation committee, indicating which proposals were non-responsive.	Buyer

# Activity: Citylandia's Process Map

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# Exercise: Snippet of Citylandia's RFP Process



# Share-out



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How can we diagnose problems  
and improve the process?

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# An effective process map comes down to....

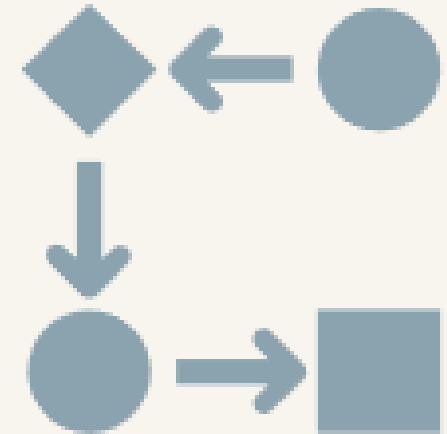
## People



## Preparation

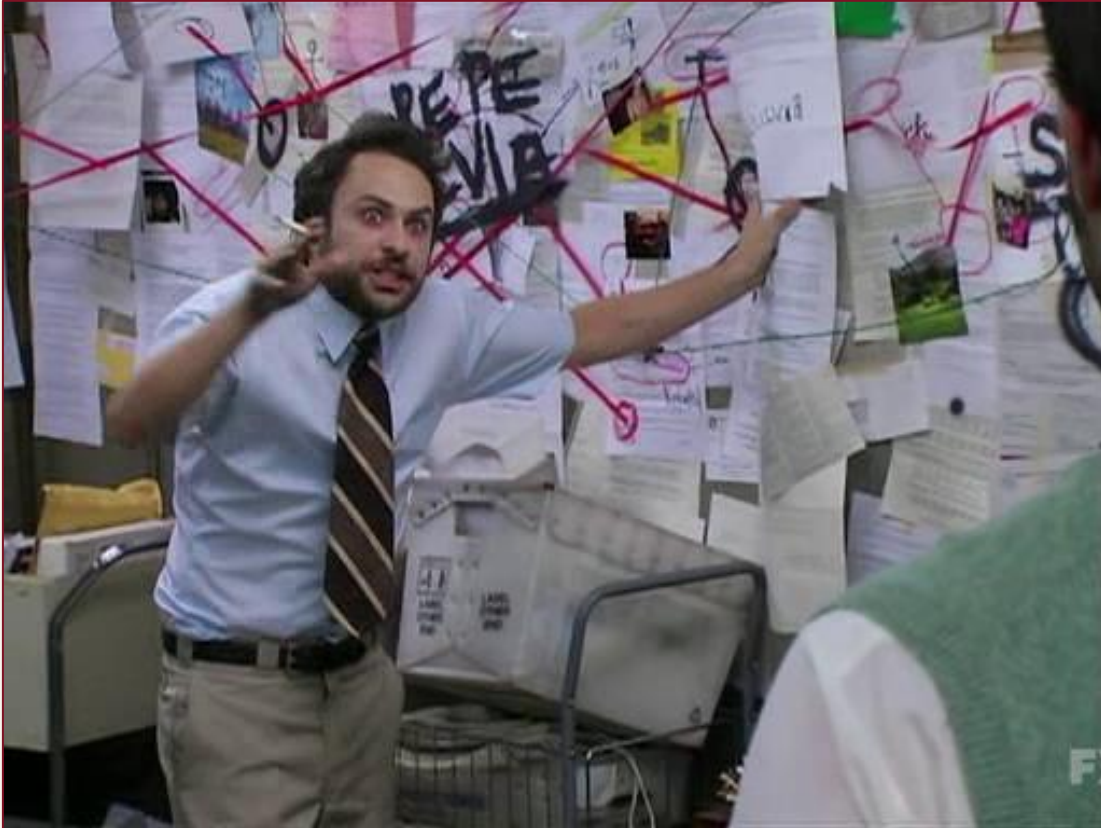


## and Method



Let's break it down into 3 steps.

# 1. Determine the process(es) you want to map.



We promise your process mapping endeavors won't be this overwhelming!

- Every procurement operation contains multiple processes!
  - For example, formal contracts, RFPs, informal purchases, p-cards...there are many places to start.
- Consider starting with a process that has caused confusion or delays in your jurisdiction.
- Longer or more complex processes will require mapping sessions.

## 2. Include the right staff.

- **Stretch beyond your immediate team** - including owners of process steps outside a central Purchasing office helps to build consensus and stakeholder buy-in.
  - Consider including customer departments, Legal, Finance and administration, City Clerk, and Data or IT
- **Don't omit frontline staff** - they often have a better understanding of how the process actually happens on the ground than managers.

### 3. Create the process map with your colleagues.

Conduct your first process mapping session in a **group setting** with those that are most involved in the process. Hold multiple sessions, if necessary for complex processes.

- **Your first goal of this session(s) is to create a shared understanding of the process.** Find out:
  - What steps are in the process
  - Who is responsible for each step
  - Quantify each step: number of days and resources associated with each step
- **Staff are busy, so craft a session that maximizes your time together.**
  - A high-level outline of the process can jumpstart the session.
  - Following the session, gather missing information via one-off consultations with stakeholders.



Don't overcomplicate!  
Only add steps to the  
process map if they  
are broadly applicable  
and occur most of the  
time

# Moving from Documentation to Change

## Part 3



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How do I use my process map to  
diagnose and solve procurement  
efficiency challenges?

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# Analyzing and solving challenges: step by step

Once you have finalized your process map, what are your immediate next steps? How can you use the map to bring about change over time? Start with developing staff buy-in and alignment around where to focus efforts.

- **Step 1:** Analyze your process map and identify focuses
- **Step 2:** Assess the risks and obstacles to change
- **Step 3:** Pilot process changes
- **Step 4:** Share, communicate, and engage staff from across your organization

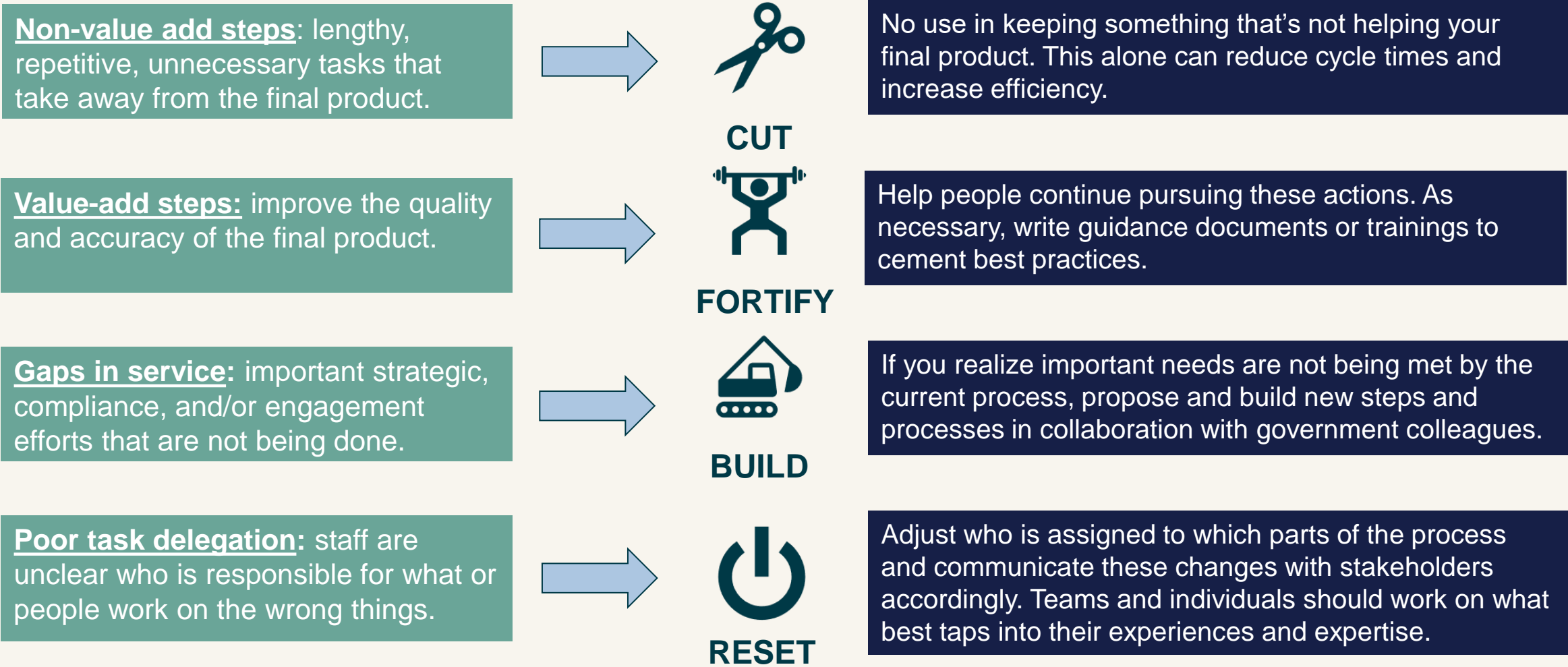
# Step 1: Analyze your process map

Working with the stakeholders you engaged to draft your initial process map, review each step and draw out the major pain points.

- Ask yourself and others:
  - **What's excessive?** Are there rounds of review or due diligence efforts that take more time than they're worth? Are there too many steps given the importance of one sub-activity?
  - **What seems missing in this process?** Are there steps we can loop in to make our process more proactive, strategic, or value-add?
  - **Are things being done consistently?** Are there major discrepancies in whether steps are always followed? Do some people often skip certain steps?
  - **Does this process include the right people?** Are there staff we can better incorporate into the process, or incorporate them earlier?

# Step 1: Analyze your process map

*As you evaluate each step, consider what changes you can make to improve it.*



## Step 2: Assess obstacles to change

**“Every system is perfectly aligned to achieve the result it gets.”** Changes will affect the stakeholders in your procurement process, and you may need to overcome resistance.

- Remember that the idea of change is **disruptive**. Changing processes will change people’s jobs and their experience at work. It may even feel like they’re losing something important to them - even if from the outside it just looks like you’re eliminating a redundant step!
- How do we overcome this?
  1. Understand **Competing Commitments**. Government staff have many responsibilities, values, and conflicting goals.
  2. Lead with **Empathy**. Even when the rational argument for change is clear, stakeholders’ fears and feelings need addressing.
  3. Develop **Sustainable Solutions** that are adaptable to an evolving environment over quick technical fixes.

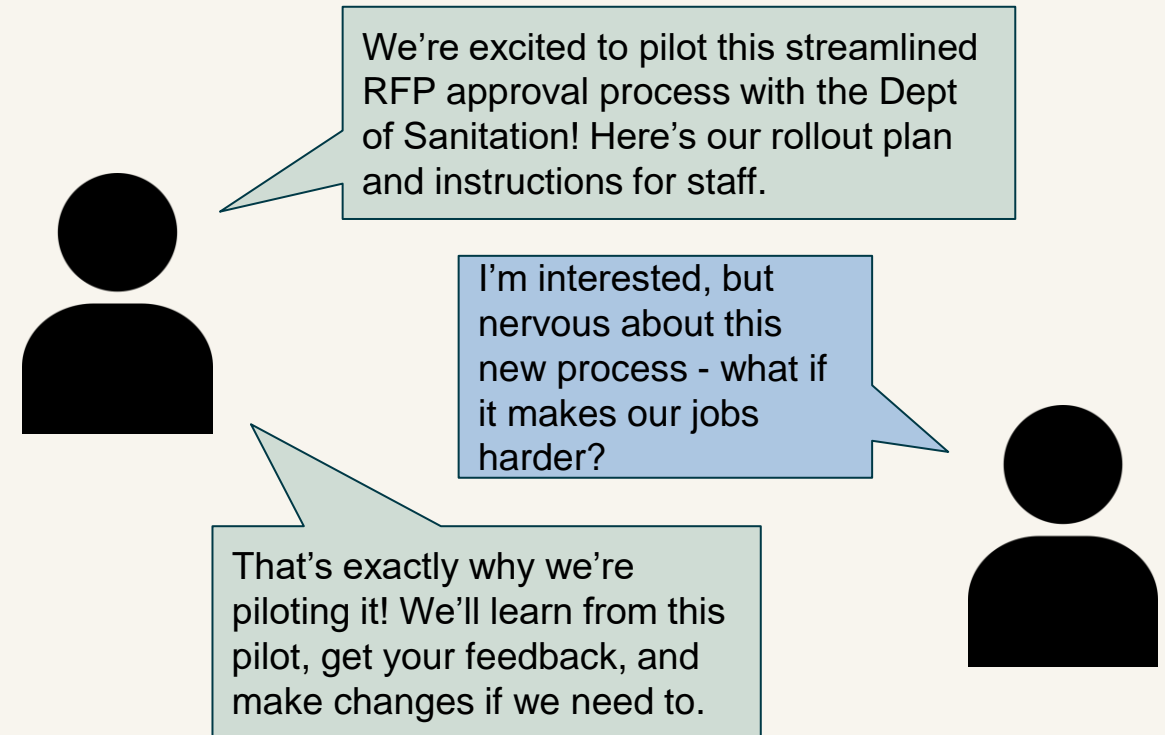
# Step 3: Pilot changes

Piloting changes is an excellent way to demonstrate the impact of process improvement and build momentum for implementation with government partners.

Where might you want to pilot a new process change? Sometimes it's helpful to start small. Consider:

- **Starting with 2-3 smaller changes**, rather than taking on everything at once.
- **Testing with specific procurement** or commodity types.
- **Testing in a specific office**, department, or agency.

Think about how you can frame or talk about your pilot in ways that overcome reluctance and resistance.



## Step 4: Share, communicate, and engage

Don't overlook the importance of communication throughout your process improvement journey. Identify a few key moments to share information within and outside your department or office.

- **Share your process map and other resources.** It offers a clear description of the steps of the procurement process and valuable data on cycle times and roles.
- **Highlight the changes you're piloting.** Talk about the changes you've made and offer suggestions for how other teams could adopt similar fixes.
- **Seek feedback.** Talk to the managers and frontline staff implementing process improvements, and modify your plans based on their experiences.
- **Train others.** Build trainings that help staff in other departments or offices replicate your successes.

# You also have a great set of potential data for performance management and evaluation.

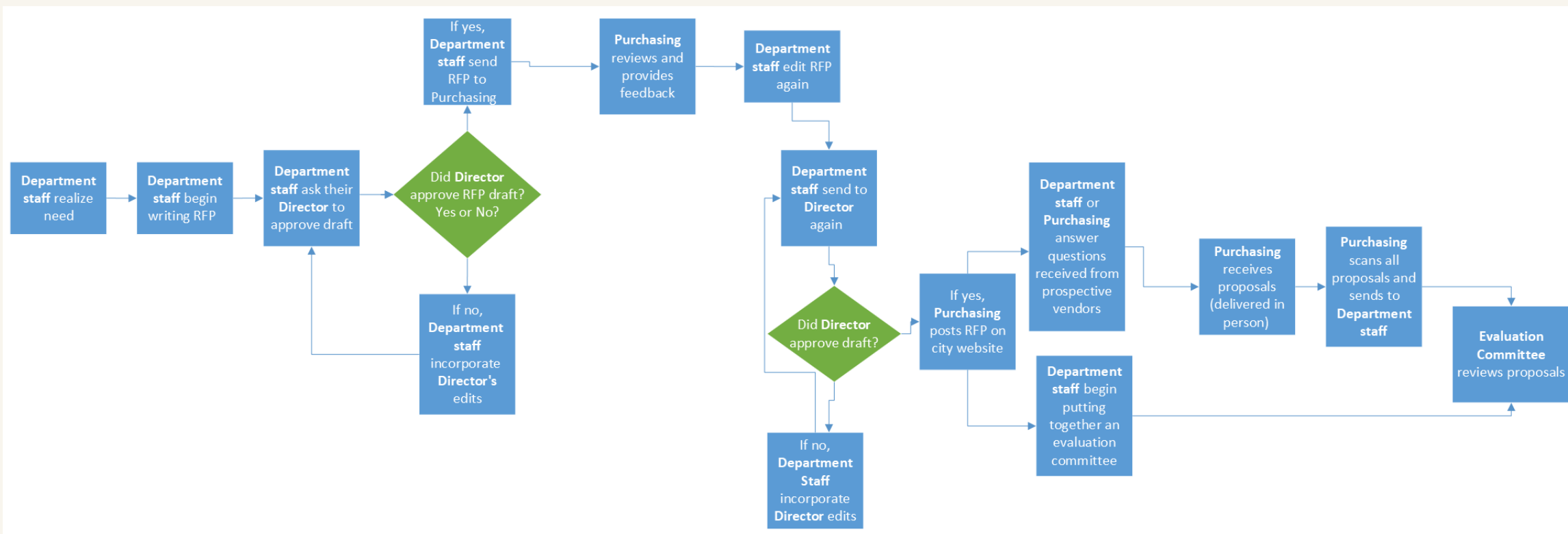
- **Cycle times:** how many business days does the procurement process take? Which stages of the process take the longest to complete?
  - Keep in mind this is only feasible to collect if you have clear timestamps for the start/end points for different stages of the process.
  - Staff time is money, so you can also assess which steps or stages cost the most to pursue! Multiply the estimated hours spent by the hourly rate(s) of staff that work on that part of the process.
- **Flow:** how many procurements do we process each year or quarter? How does that breakdown differ by solicitation type (ITB, RFP) or product/service?
- **Role delegation:** What department or staff member “owns” the most steps? Who are most crucial for each stage of the procurement process?

# Activity: Return to Citylandia's Process Map

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# Return to Citylandia's RFP Process



How have governments used  
process maps to cut cycle  
times and reduce waste?

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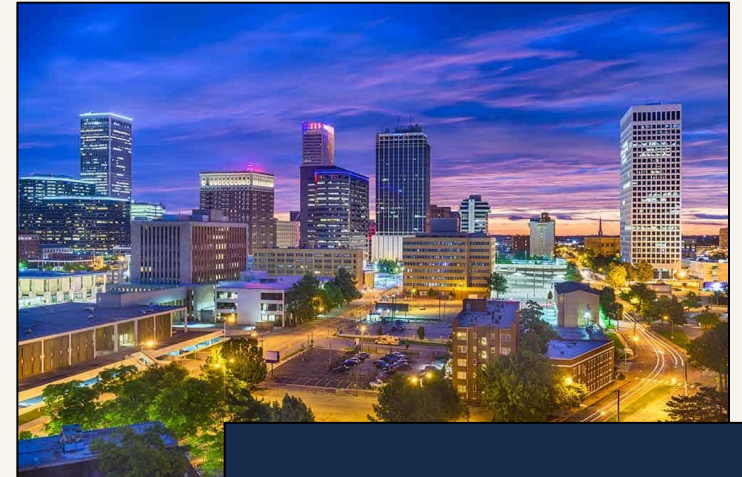
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# City of Tulsa, OK

In Tulsa, GPL used process mapping, along with focus groups and follow-up interviews, to build consensus around the steps, resources, and time required in the procurement process. Using these insights, Tulsa staff:

- **Streamlined forms and signatures:** Tulsa consolidated notarization requirements, required only 1 signature, and kept solicitation documents clear and lean.
- **Removed excessive review:** At first, an standards committee reviewed every solicitation before publication. To save time, Tulsa staff eliminated that review, instead leaving the final approval to the Purchasing Director.
- **Rearranged steps for greatest impact:** Instead of having Tulsa's Legal team assess contracts *after* they were awarded, City attorneys now give feedback (and catch errors) during the drafting process, saving time and resources.

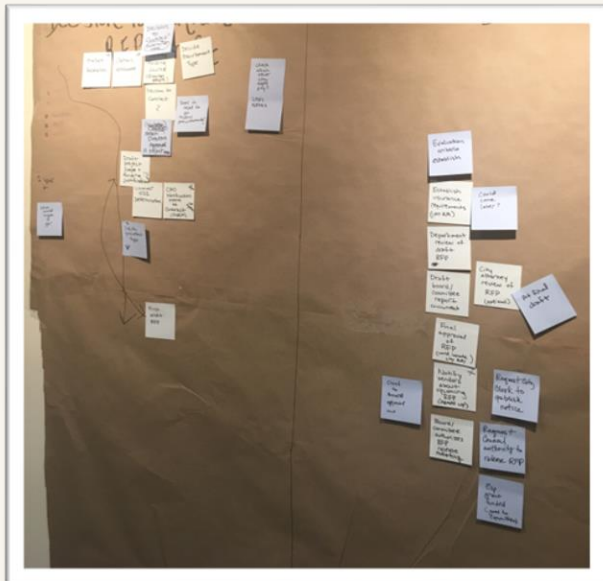
Collectively, these efforts helped reduce cycle times by **3 weeks**, an 18% decrease!



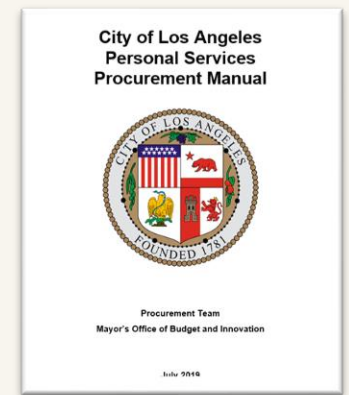
# City of Los Angeles, CA

## Process mapping sessions with city departments helped us discover:

- Many departments do things differently (which we expected!), which led us to question: How much of this variation is acceptable or good practice? Where should steps be more consistent across the city?
- Some steps done in sequential order could be done concurrently
- Identified a need that departments needed a manual that talked them through the steps necessary for professional service RFPs.



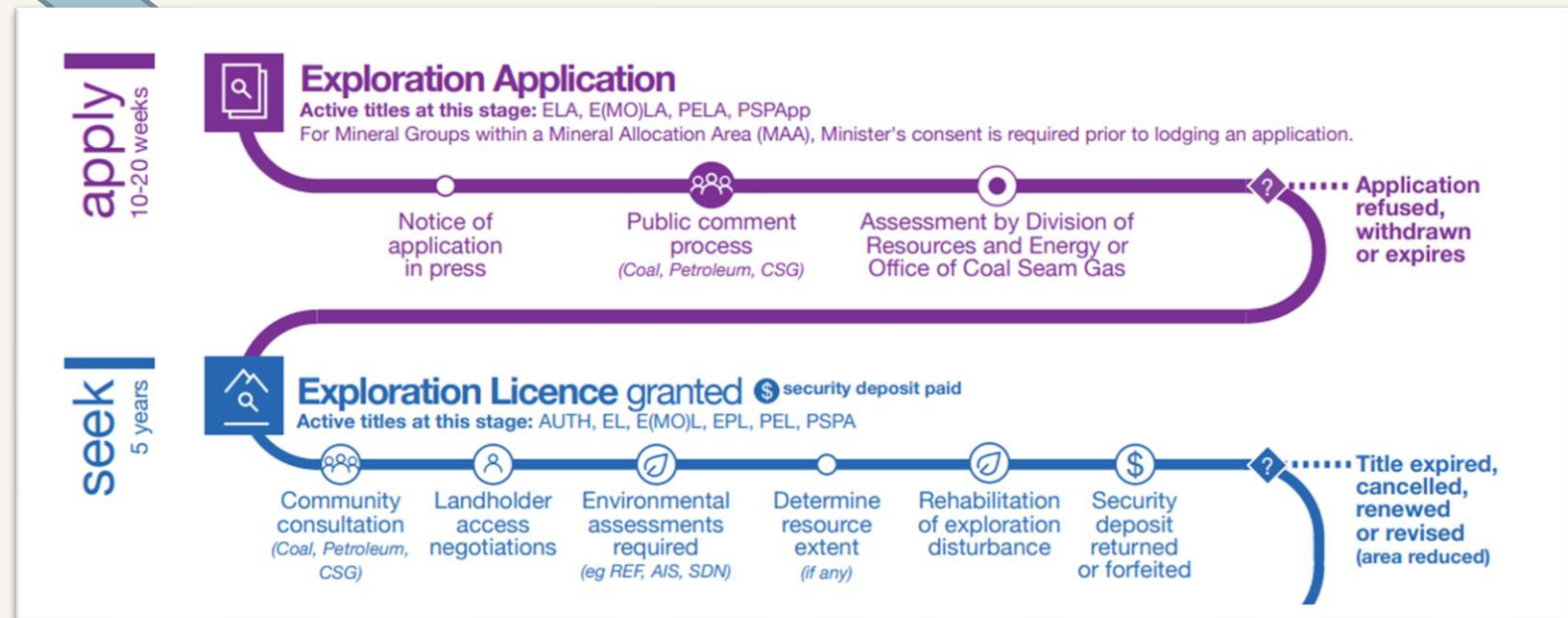
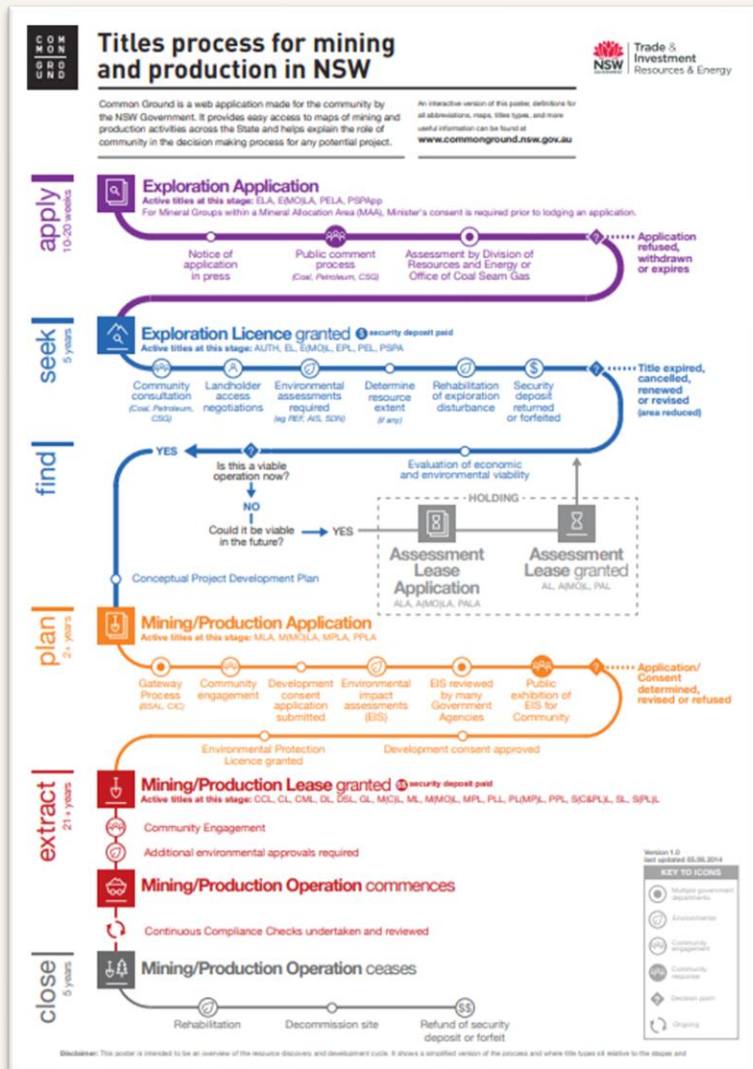
1.1 Pre-RFP	DEPT	Develop team and approach.	None
1.8 Pre-RFP	DEPT	Draft basic scope of work.	None
1.9 Pre-RFP	NOI	Fill out Notification of Intent to Contract and send to CAO ERD.	<a href="#">Notification of Intent to Contract</a>
1.10 Pre-RFP	CAO	Receive and post Notice of Intent to Contract.	<a href="#">Contract Clearinghouse</a>
1.11 Pre-RFP	DEPT	Determine whether 1022 process is required.	None
1.12 Pre-RFP	DEPT	Submit request for 1022 determination to Personnel Department.	<a href="#">Charter 1022 Information Form</a>
1.13 Pre-RFP	PERSONNEL	Determine whether city personnel can do the work by completing the Contract Review Report and sending to department.	<a href="#">Charter 1022 Review Report</a>
1.14 Pre-RFP	PERSONNEL	Find City employees who NOT have expertise to perform the work. 1022 process completed.	None
1.15 Pre-RFP	PERSONNEL	Find City employees who have expertise to perform the work. 1022 process continues.	None
1.16 Pre-RFP	PERSONNEL	Provide list of departments and job classifications that perform similar work to contracting request.	None
1.17 Pre-RFP	DEPT	Contact departments to determine if their staff can perform the work in the time required.	None
1.18 Pre-RFP	DEPT	Receive responses from other departments and complete 1022 Department Contact Summary Form.	<a href="#">1022 Department Contact Sum</a>
1.19 Pre-RFP	DEPT	Find that no other departments can perform the work within the time required or the work assignment exceeds staff availability.	None
1.20 Pre-RFP	DEPT	Find that other departments can perform the work within the time required.	None
1.21 Pre-RFP	DEPT	Enter into agreement with another department to do work instead of contracting out.	None
1.22 Pre-RFP	DEPT	Request for 1022 Determination from CAO based on feasibility or economic justification.	<a href="#">Request for 1022 Determination</a>
1.23 Pre-RFP	DEPT	Complete Contract Cost Analysis Form and associated spreadsheet if requesting an economic justification.	<a href="#">Contract Cost Analysis Form</a>
1.24 Pre-RFP	CAO	Analyze request submitted and transmits written 1022 Determination findings.	<a href="#">CAO Charter Section 1022 Det</a>



# Example from NYC: **Your Path to Contracting with the City**



# How might you communicate a process effectively?



Designs by **Nook Studios**, an Australia social enterprise dedicated to improving information experiences and designing content and tools to help people demystify complexity. More examples of their work is at <https://nookstudios.com/>



Department of Agriculture,  
Water & the Environment

# Environment Protection and Biodiversity Conservation (EPBC) Act

## INFORMATION JOURNEY

This is the likely end-to-end journey for someone considering an activity or project that could affect the Australian environment.

We have mapped out the steps in order to seek feedback and comments from our research participants and the DAWE team.



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# Feedback Poll

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# Additional Resources

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