# Including Flow Lines of People in Process Charts

By Ben B Graham

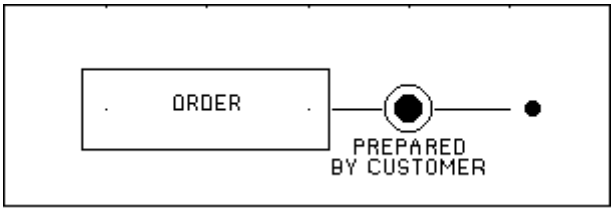


We try to avoid charting people when we can in order to keep the focus of the chart ON THE PROCESS. However, there are situations where it makes sense to chart people. You may want to *chart an operating person* when there is a particular concern with travel (a mail delivery person), security (a person working in a vault or mint), safety (a nuclear plant worker), etc. In these cases, we simply follow the path of the person we are charting and tie them into the chart along with the documents, forms, files, etc.

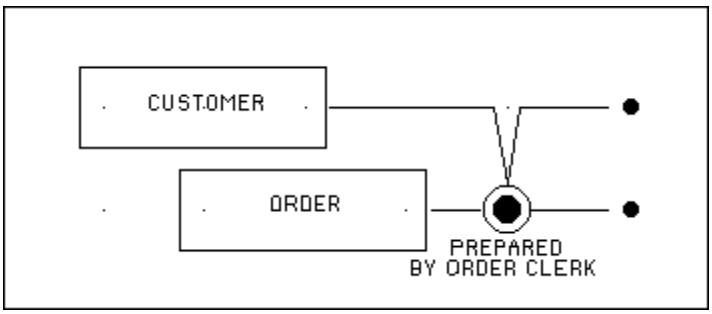
An example of a different type of situation that logically calls for a person to be charted is when *the work or part of the work to be processed is a person* (a patient in a hospital admissions process, a prisoner in a booking process, a new employee in a hiring process). These types of processes can be charted without charting the person being processed, HOWEVER, charting the flow of the person can bring to light customer service issues concerning delays, excessive traveling between processing areas, security and control issues, etc. Here again, we simply follow the path of the person we are charting.

A third type of situation that calls for charting people is where a process includes a *verbal exchange of information*. This situation is probably as difficult to conceptualize (from a process standpoint) as anything we chart. The reason is that the information is captured and stored in a brain and transmitted "invisibly" without the aid of a pen or a keystroke.
It will help to remember that a chart shows the flow of physical items (including electronic documents, paper documents and people). An information transaction is shown on the chart as a value-added step along the flow line of a physical item.

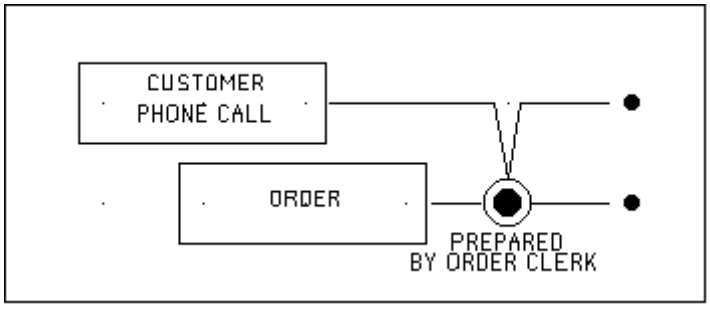
Typically, we show the transfer of information from a person's brain to a document/form by identifying the person in the text associated with the step they performed. Here, a Customer prepares an *Order*.




A person can also provide information verbally that is captured on a physical or electronic document/form by a different person. Here, the transmission of information is shown as an Effect from the *Customer* line to the *Order* line. The *Customer* is providing information that triggers the creation of an *Order* by the Order Clerk. The *Customer* has only provided information.



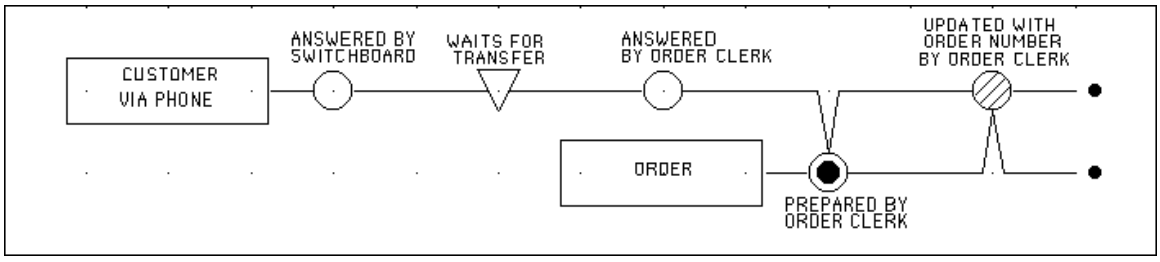

When the request is transmitted over a phone, the chart is nearly the same. The transmission of information is shown as an Effect from the *Customer Phone Call* line to the *Order* line. The *Customer Phone Call* (The Customer on the phone) is providing information that triggers the creation of an *Order* by the Order Clerk. Here, again, the *Customer* has only provided information.



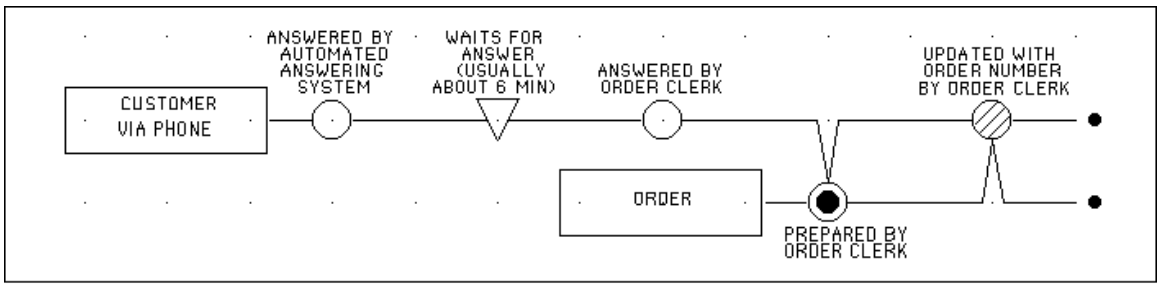

*The purpose of this illustration is to demonstrate that even though the Customer and Order Clerk are in different locations, there is no transportation step involved. We have charted the Customer and the Order, neither of which have moved.*

We don't chart the verbal transmission of information, but rather the recording of information; then the handling, updating, reviewing and moving of the recorded information.

In a telecommunications environment it may be advantageous to capture detail related to the phone call (answering, transferring, putting on hold…).

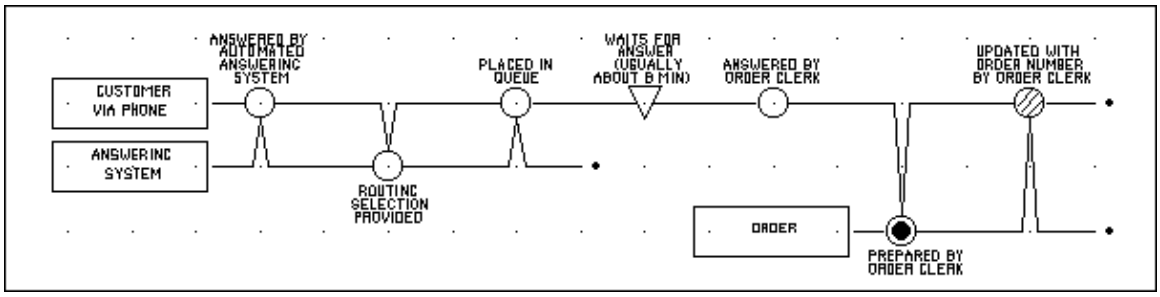



If the call is answered by an answering machine…




The steps along the Customer Via Phone flow line are happening TO the Customer Via Phone (The Customer on the Phone)…The Customer is answered/engaged by the answering system, the customer waits for the Order Clerk to answer, the Customer is answered/engaged by the Order Clerk, the Customer PROVIDES information to the Order Clerk which is used to prepare an Order, the Customer is PROVIDED WITH an Order Number.

Note that the previous illustration DOES NOT capture the response of the Customer to the answering machine. This is because the information (i.e. pressing phone buttons or speaking to determine routing) isn't happening TO the Customer, it is happening to the Answering System which is not charted. We could include the Answering Machine in our chart as is shown below:




Whether you chart the answering machine or not is an issue of detail. The level of detail that you capture in your chart is determined by the objectives of your charting project and is a decision that becomes easier with charting experience.