

From Process Mapping to Intake Doc

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AEA Evaluation 2016 – Atlanta GA



My name is Michelle Burd.
I'm an independent consultant.
I live in Austin, Texas

I was Internal evaluator for 10 years for local school district
As an external evaluator, dabble for several years, business going strong for 6 years

my projects are in education, focused on stem, and in Higher Ed of late



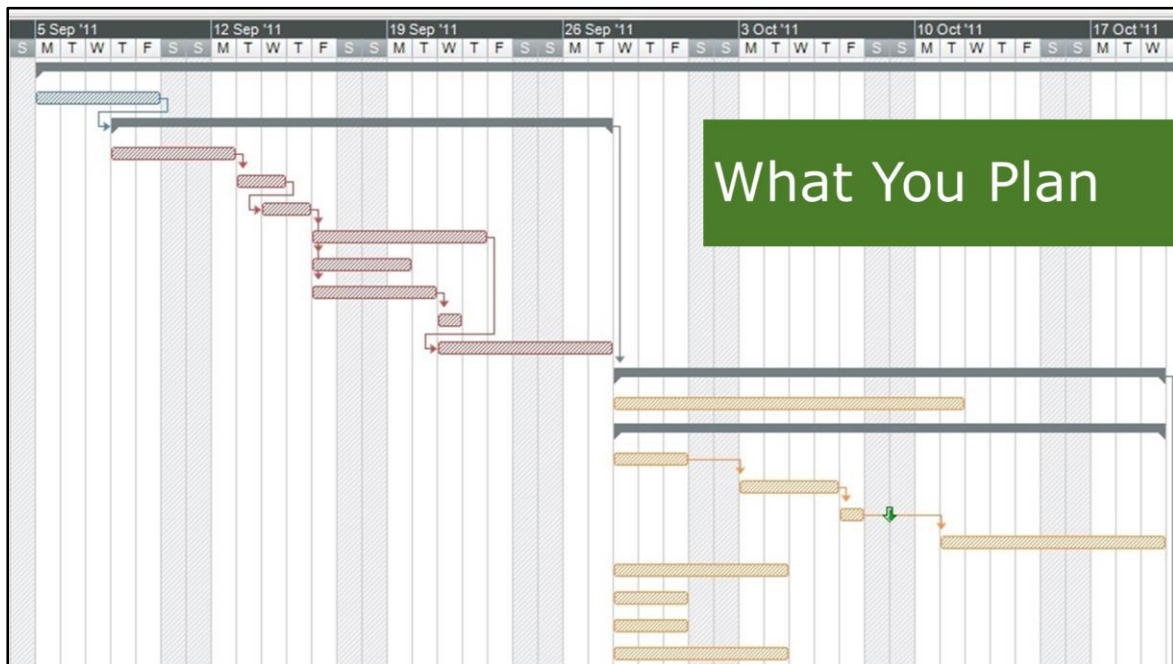
Question: Surely we want our businesses smooth sailing?

Raise your hand if you have some problems with your business, areas where Not working so well

It would be nice if our businesses ran smoothly from the start

What I'm going to you talk to you about today is a tool I learned from a business coach

Help you diagnose What's keeping you from smooth sailing



There is what you plan to do you, and what you do do

And that doesn't always line up with what actually happens.

Have you got the sequencing right, are your steps in the proper order?

Does that data analysis really take you the amount of time you think it does, is it longer, is it shorter?

Or are there steps in the sequence completely missing?



Chances are, at any point in the process, you might feel overwhelmed

Causes stress for yourself and your loved ones

It can play out your relationships with your customers

As a business person, that's where it matters

that's your brand, that's how you communicate the experience of your brand to your customers – the relationships

If some steps in your business processes are not going well, that's where it really matters



So...You've got to build your business muscle

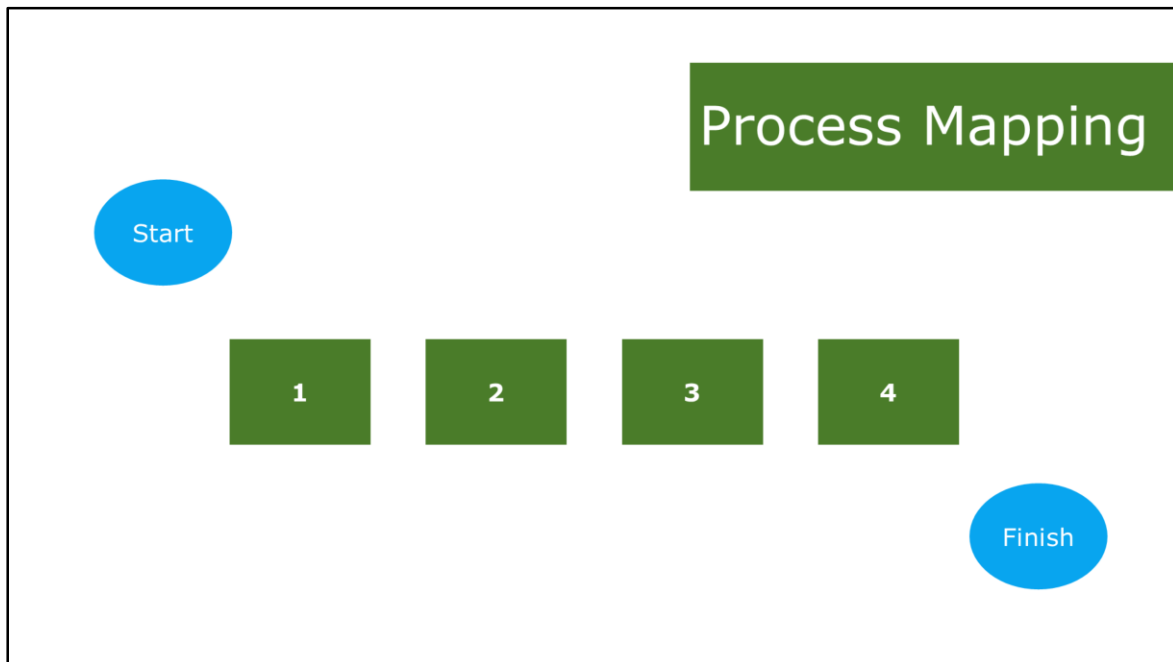
As one of my colleagues once said

I don't have an MBA. In grad school, Avoided Biz building like the plague.

But as Small business people, we've got to build up our skills

What I'm going to share with you today is a tool to diagnose the steps in your business Processes

You can use it to figure out what's not working well, Where you need to tweak it a bit, and Where its smooth sailing



Businesses all over used proper mapping to figure out what needs changing to improve the system

process mapping is describing a series of steps visually so that you can see the connections between them and make decisions about what improvements to make

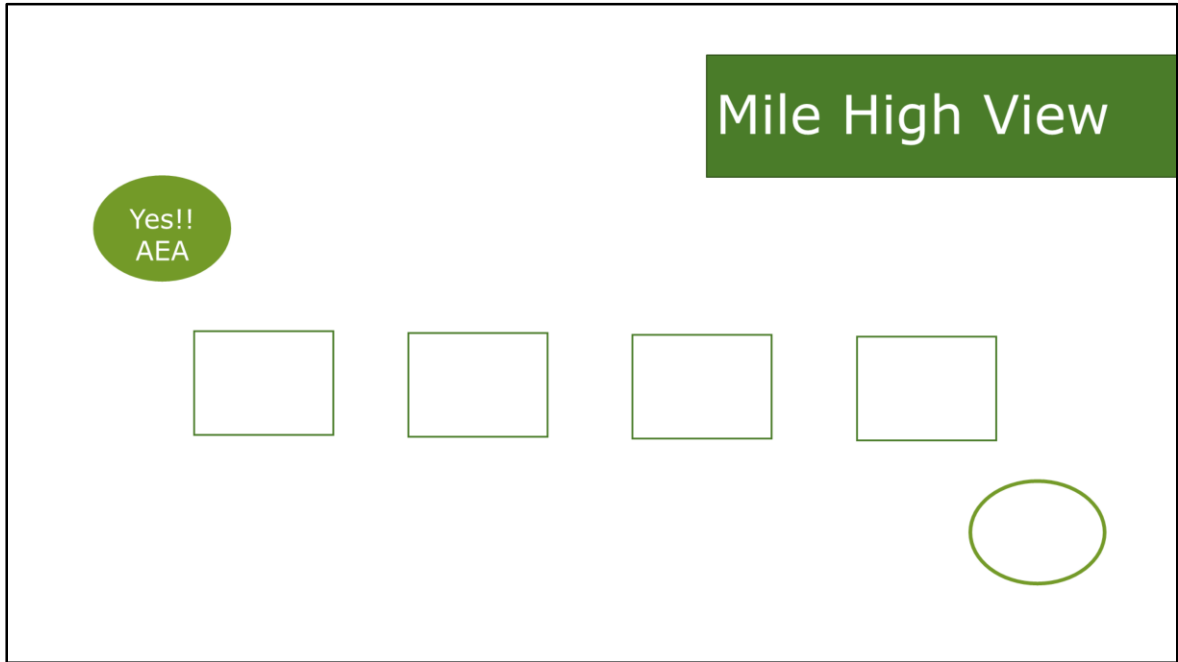
You hear language of evaluation in that definition –The point is, you're going to conduct a self-study, make judgments about what's working and what's not working, and then devise and carry out a plan to make improvements.



Mile High View

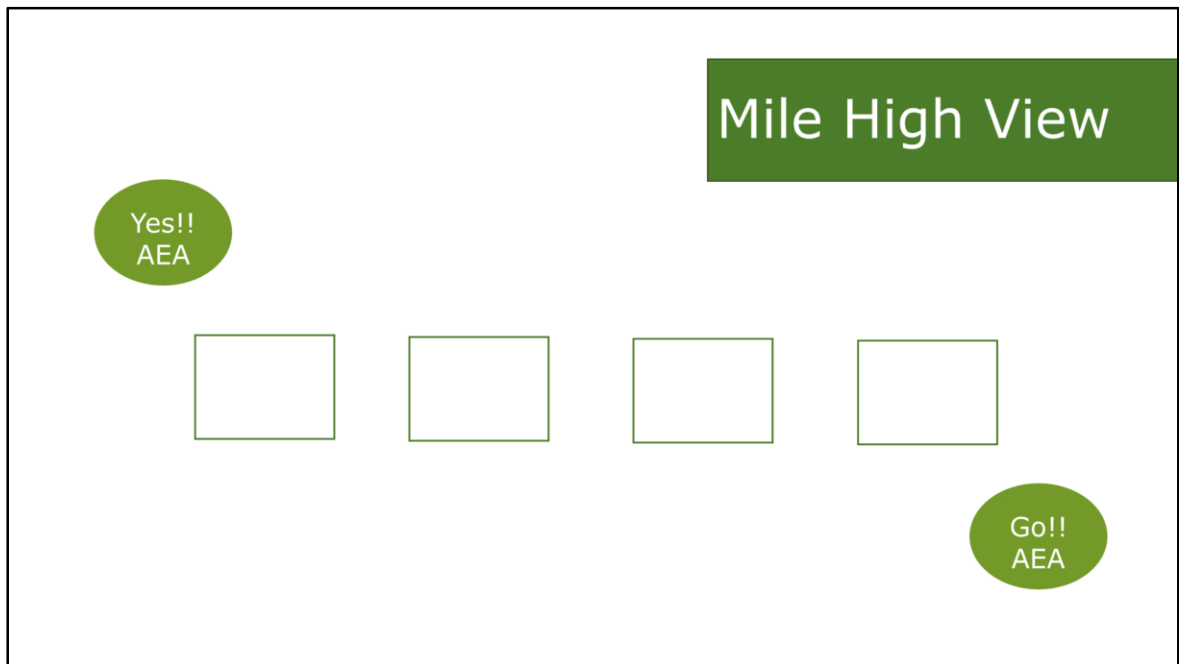
What you would see from an airplane. We are not talking about details, you can't see people or make out cars

We are talking the **big picture**. You see towns, roads, farmland, clusters of trees

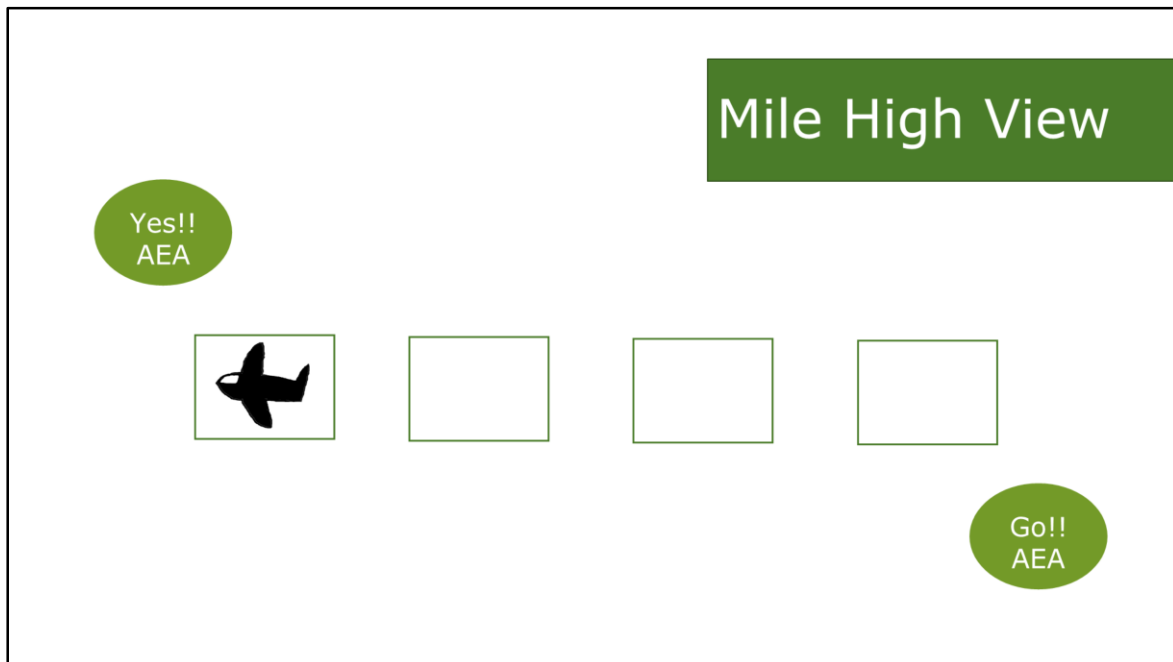


Let's take a simple, real life example

The decision to come to Atlanta for the 2016 AEA conference



Endpoint is when you walk out your front door to head for the conference

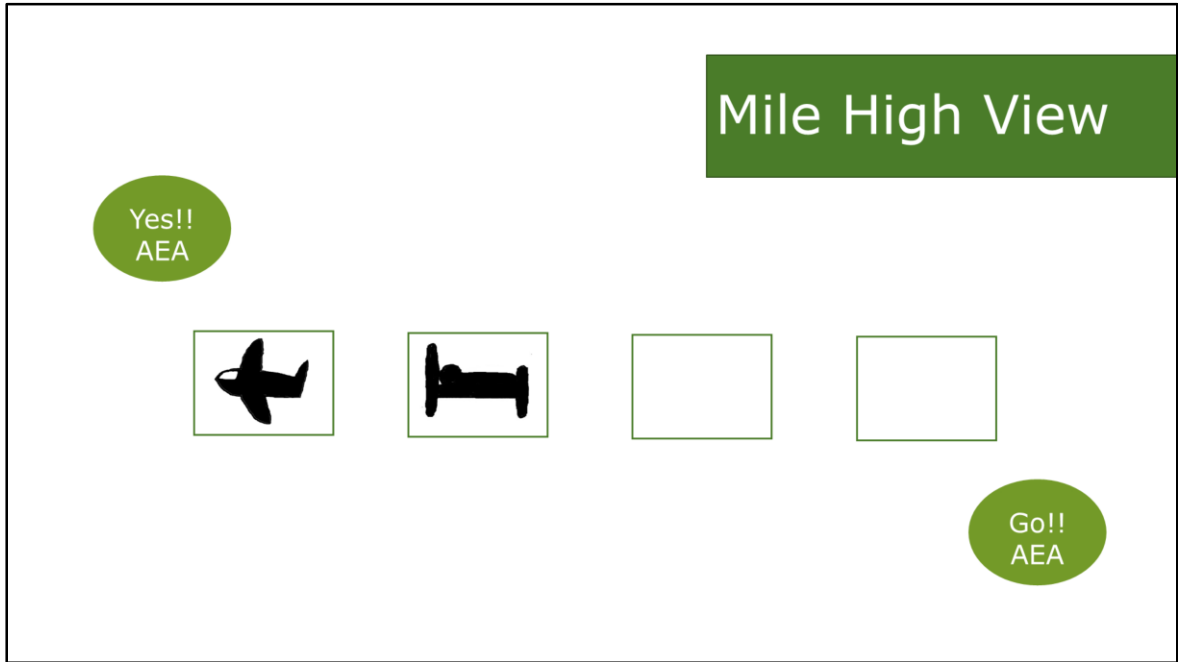


One big step is travel arrangements

How will you get there? Plane train car bike—in my city, I'd bike, I live close to downtown & convention center

When will you go? PD? Stay through the weekend and visit friends or do sightseeing

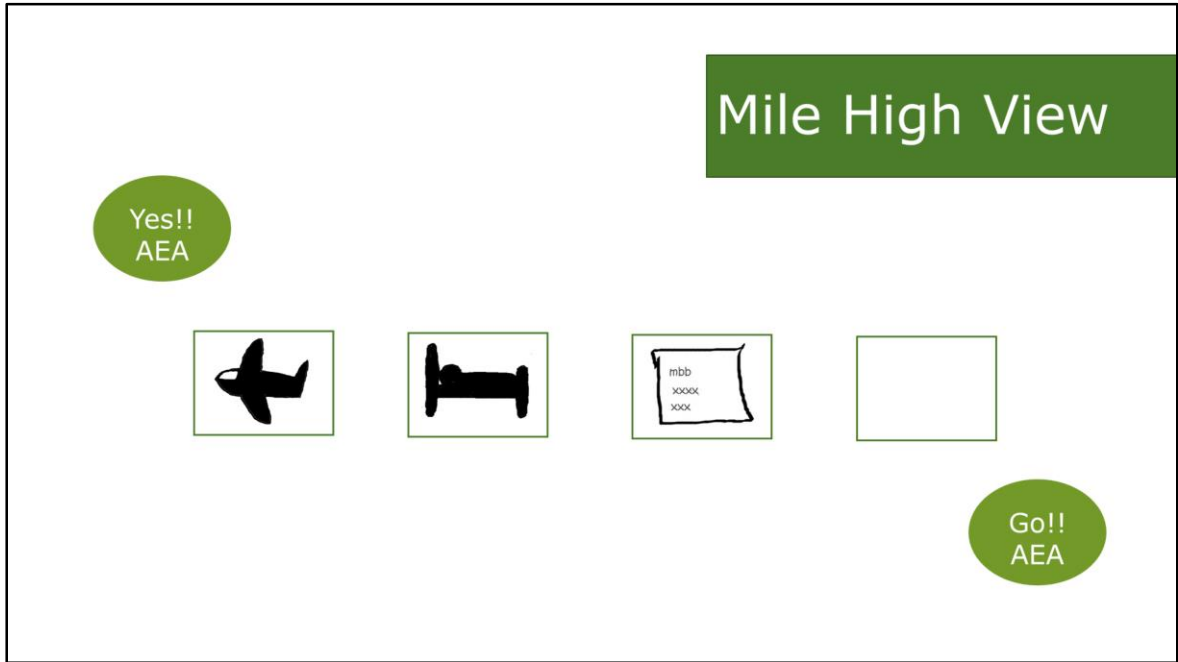
Lots to do & decide to make those arrangements



Where will you stay?

Will you share a room?

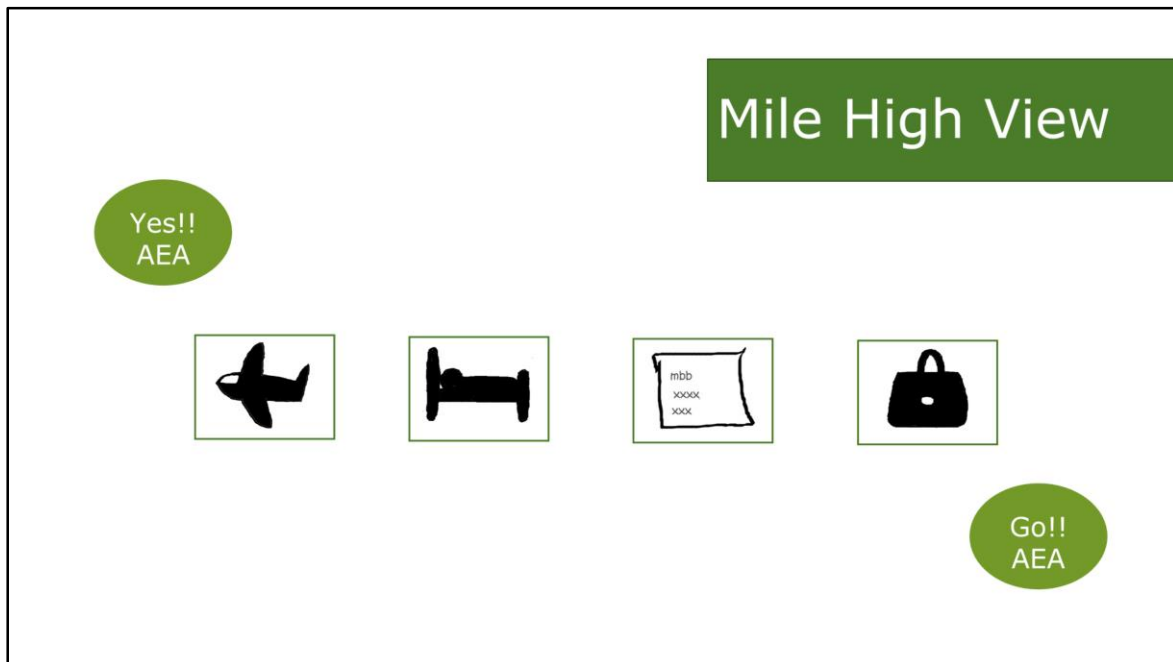
Maybe you'd like to try Airbnb this time



Then I register.

PD? Is your membership current?

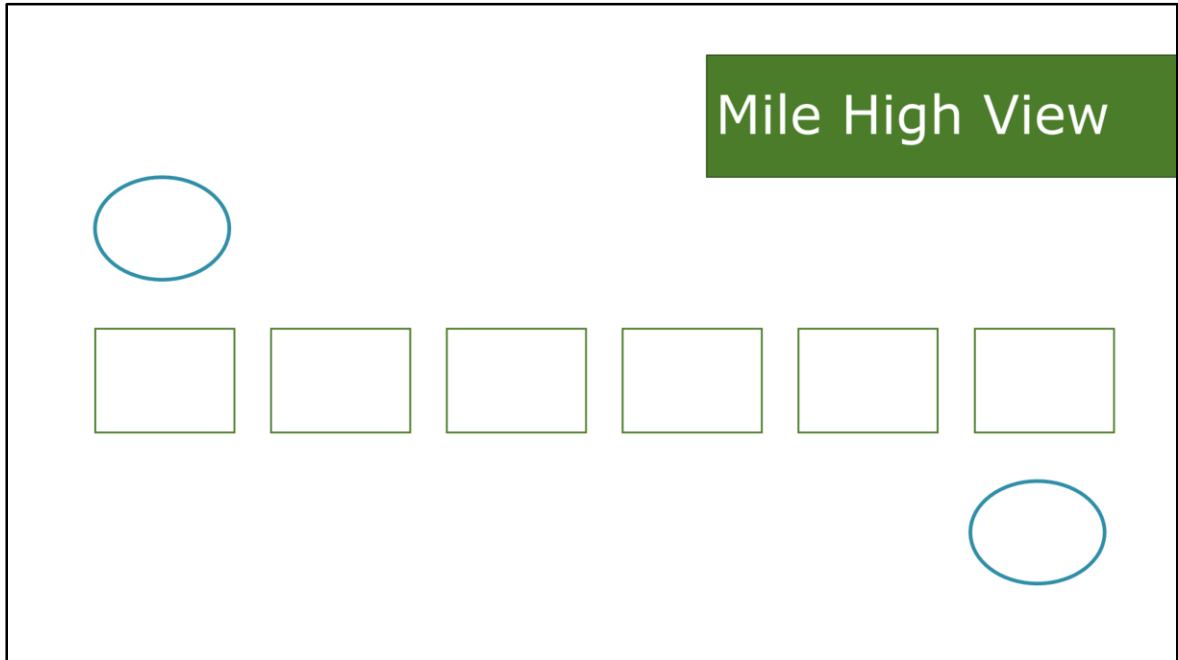
Will you attend awards luncheon?



Time for packing.

Have you got everything you'll need?

Prepare for cold weather—Minneapolis or warmth of Hotlanta.



Now you try.

Think about your biz from the mile high view.

What initiates a project? Contract or Call to join a proposal

What is the end product?

Name 4-7 main tasks that need to happen, in succession, to get from start to finish.

5-7 minutes



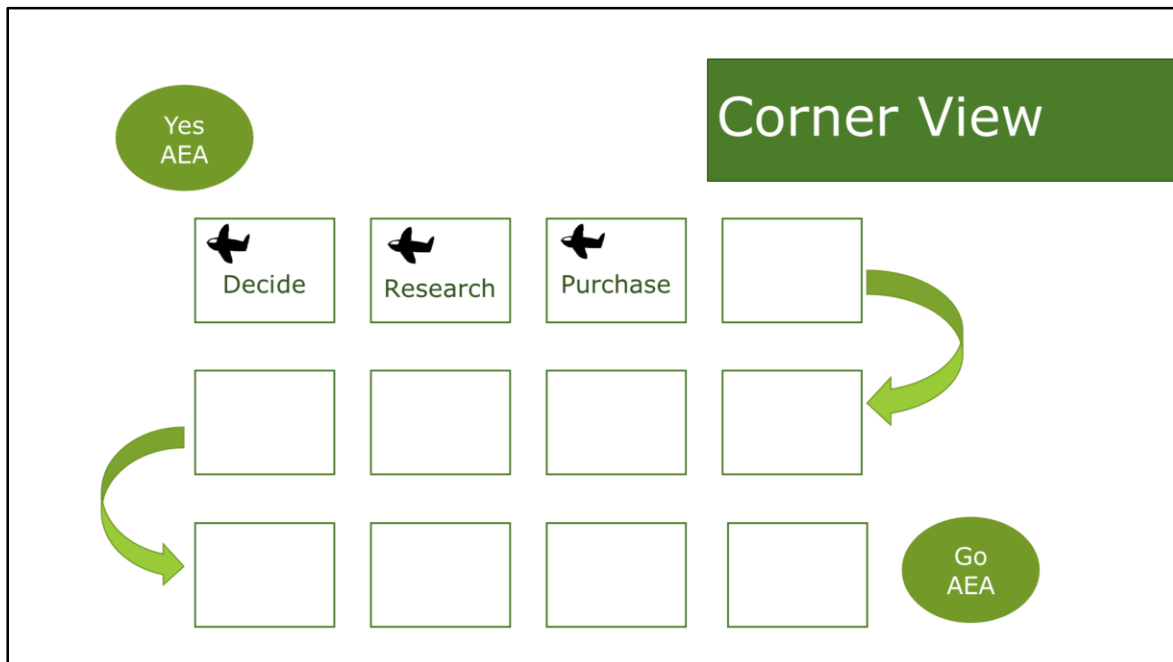
Next you have the corner view.

Here you go into detail. You can see the cars, the places people live, where they shop. You have more categories to consider

If you have a group of people who work with or for you, you might want to interview them about tasks

It's important to consider what's really going on. Not omit anything because you know it needs fixing, because the process is imperfect.

You want to look at what's really going on so you can fix it.

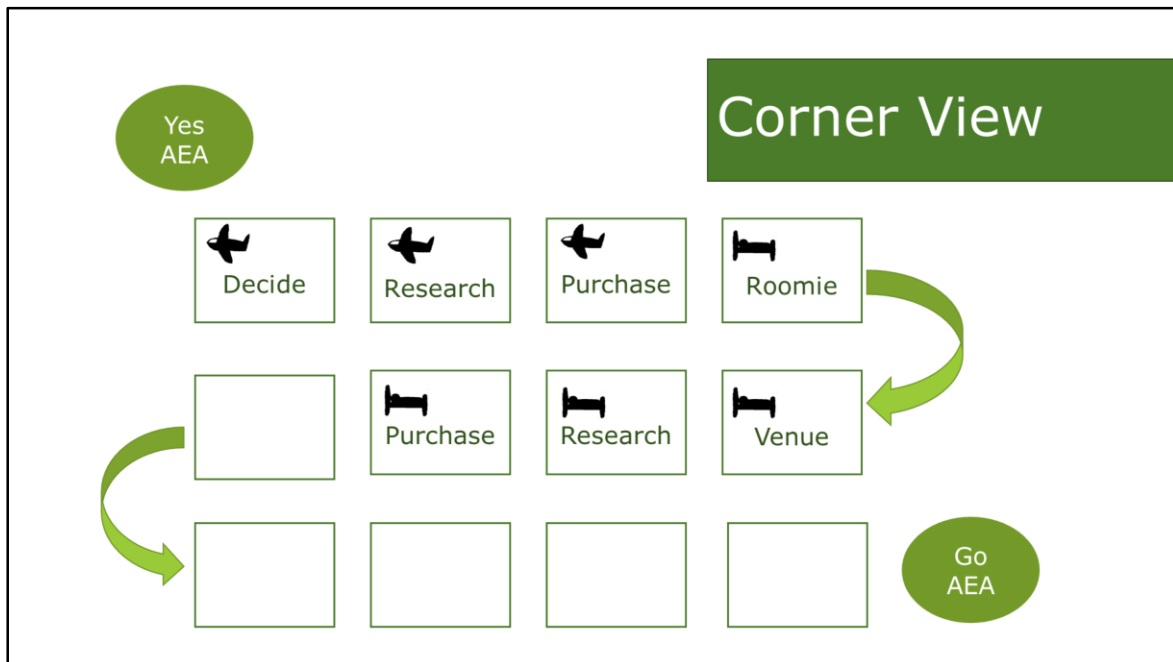


Transportation to conference

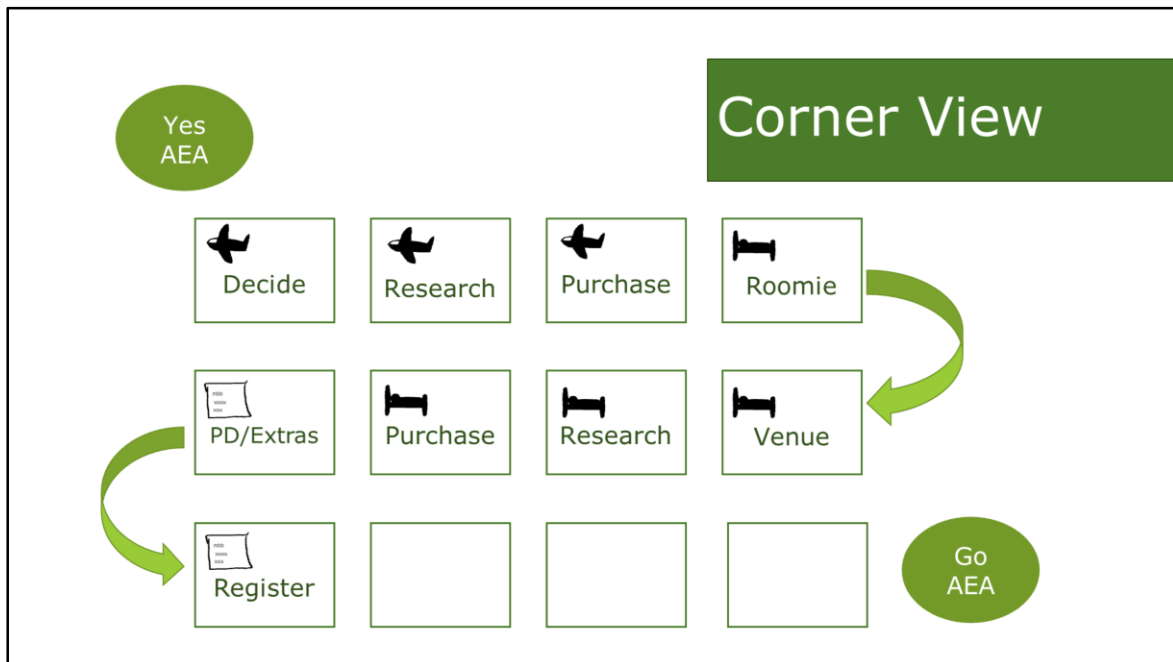
How will you get there?

Do some research, what are your options, best deals, best timing

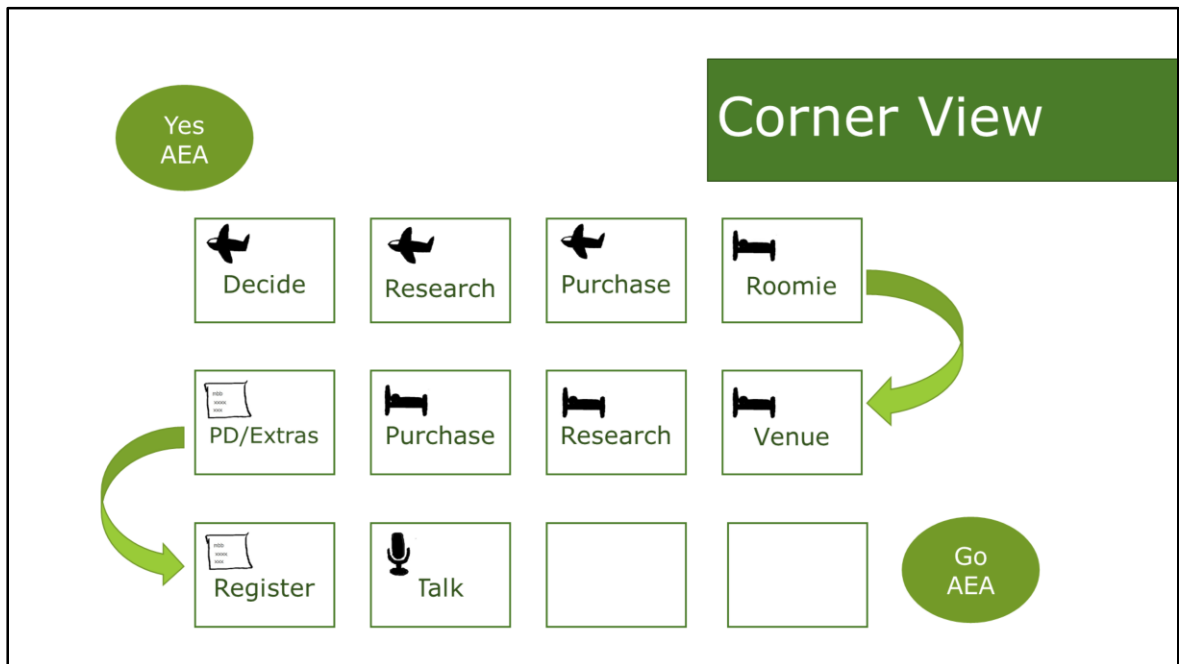
Make your purchase



Roommate
Where & how
Check out options, Make a choice
Pay or reserve

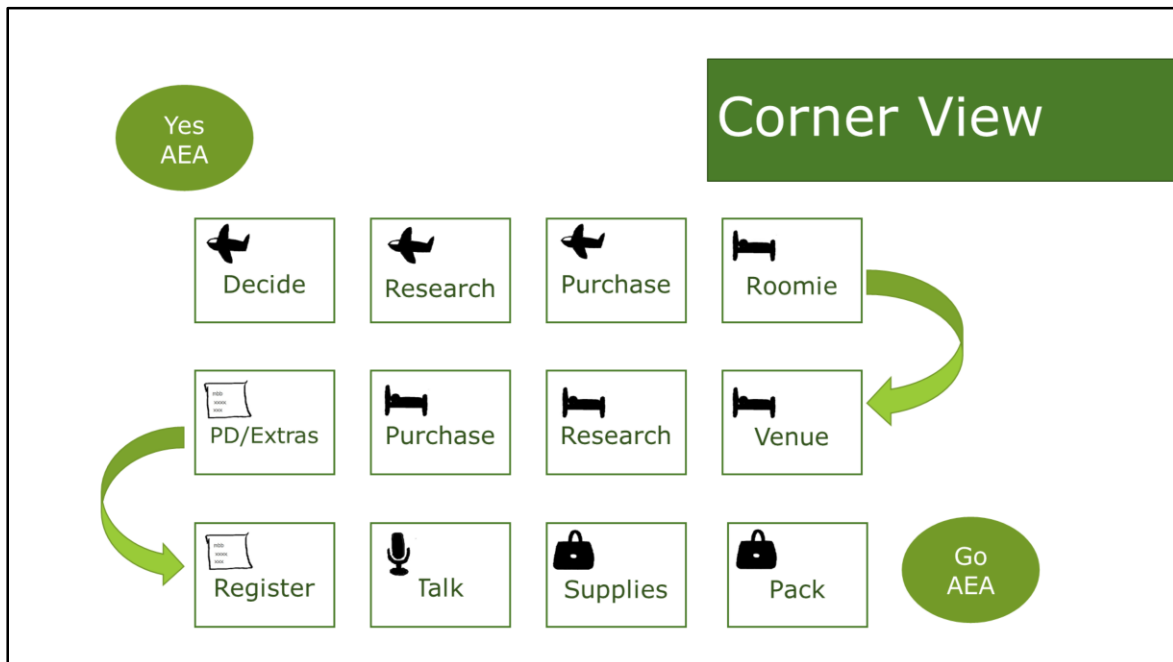


To register, decide on PD, which one, lunch, tours
Make your commitments there



What have we here? a new task

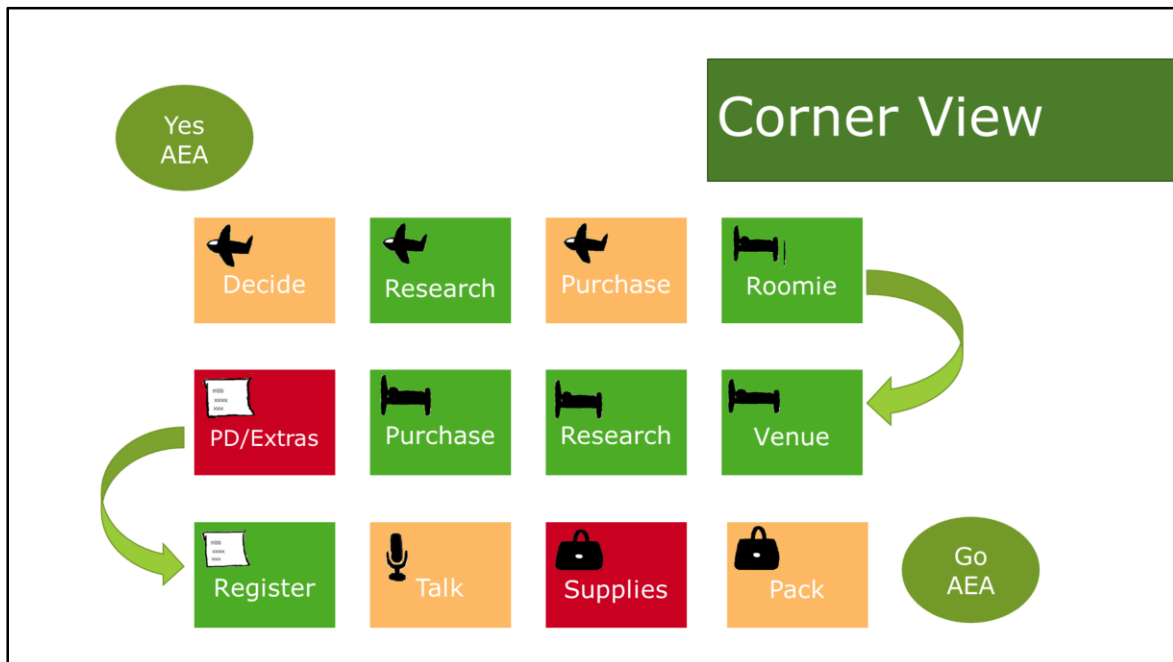
your proposed presentation was accepted & you have to prepare your talk



Packing. Need new shoes. New wheels for your suitcase, better yet a new bag
& then you Pack

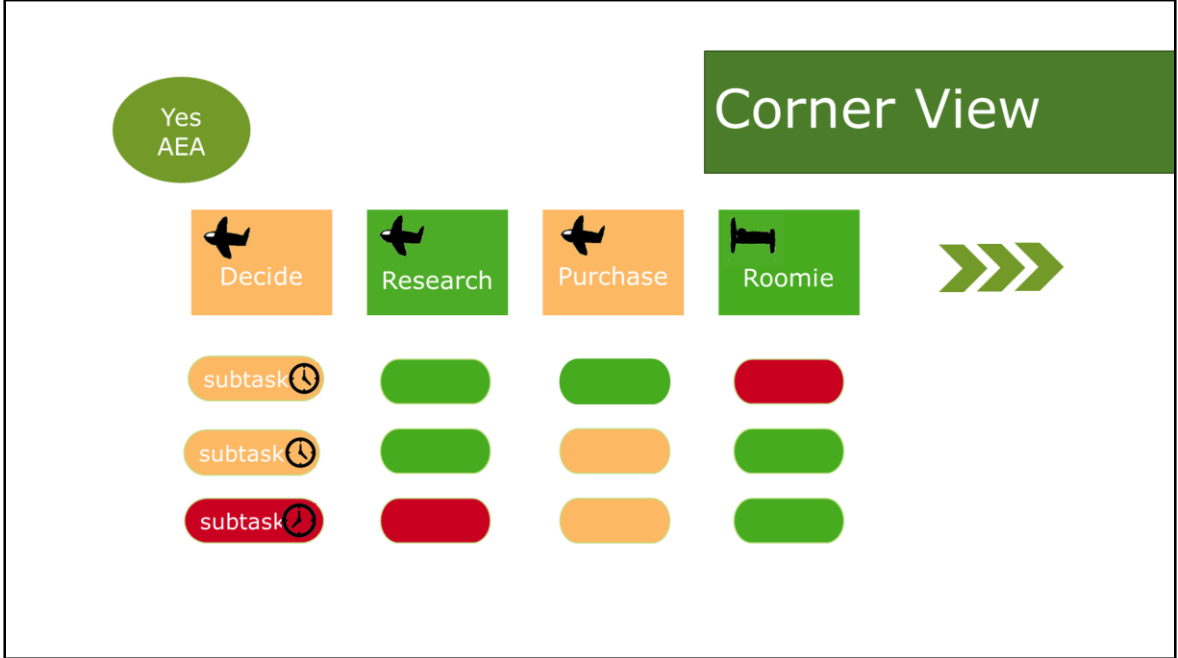


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Now that you've got your steps laid out. Here's where you start reflecting on what's working, what's not working.

Colored pencils on table, Green for "I got this," Yellow -- "Ah. Need some tweaking."
Red -- "where are we will concentrate our efforts!"



Subtasks_another level of

Time Estimates

Phase	Task	Subtask	Hours
Transportation	Decide	How When Where	x
	Research	Explore Compare	x
	Purchase	Check on \$ Hand over \$	x

Each of tasks have subtasks, what are they, how much time does each take.

I have mine in ranges, calibrated for the number of times you repeat a subtasks in a particular project, e.g., for data collection, 2 interviews or 20

Use to figure out quotes for proposals & Monitor your progress & remaining funds

Intake Doc

Phase	Task	Hours
Transportation	Decide	5
	Research	
Hotel	Roomie	3
	Research	

What is the Intake Doc?

It's a I use to go over expectations with client so that we're on the same page.

What will happen, how much time it should take – It's an opportunity to get clear and discuss or negotiate any differences

The screenshot displays a Google Calendar interface with a weekly view for the week of September 19-22, 2016. The calendar is filled with various time slots and events, including 'Share data_preliminary results', 'Analyze qualitative_S', 'Write report', 'Soccer Practice schedule', and 'Collect data_communicate with clien'. A green banner in the top right corner reads 'Time Tracking'. The interface includes a search bar, a 'CREATE' button, and a list of calendars on the left side.

Time Tracking

Calendar Today < > Sep 19 – 22, 2016

CREATE

September 2016

S M T W T F S

28 29 30 31 1 2 3

4 5 6 7 8 9 10

11 12 13 14 15 16 17

18 19 20 21 22 23 24

25 26 27 28 29 30 1

2 3 4 5 6 7 8

My calendars

Reminders

SEU_CASAR

SEU_IUSE

SEU_Noyce II

SEU_STEP

UT ESI REU

UT RGV SHIP GEO

UT RGV_CENA

UTA_Nanotech

Other calendars

GMT-05

Mon 9/19

Tue 9/20

10:45 – 11:30

11am Share data_preliminary results

11:30 – 11:30p

11:30 – Planning_communicate with client

12pm

12:15p – 2:15p

Analyze qualitative_Study & select

1pm

2pm

3p – 4:20p

Analyze qualitative_Study & select

4pm

5pm

6:40p – 7p

Analyze qualitative_Study & select

7pm

8pm

11:30 – 2:30p

Analyze qualitative_S

11:30 – 1:30p

Margarita

11:30 – 4:30p

Write report

11:35 – Transcribe_mans

12p – Collect c

12p – 1:30p

Rick Campa_Group

1:30p – GoToWebinar - CFD : Data Party Tip

2:15p – 3:45p

Planning_Communicate with client: Richard

6:30p – 8:30p

Write report

6:30p – 7:45p

Soccer Practice schedule - 13-15 team

6:45p – Collect data_communicate with clien

6:15p – 8p

Write report

4:35 PM 10/21/2016

Check It Out

Bell, M. (n.d.). Process Mapping: A simple approach to improvement by making a process visible. Retrieved from <http://www.simpleimprovement.co.uk/Process%20Mapping.pdf>

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