

# Process Mapping Guide for Public Health

This guide accompanies the Process Mapping for Public Health training, as part of ongoing technical assistance support for PHIG recipients. Whether you're preparing for accreditation, onboarding new staff, or working to capture institutional knowledge before it walks out the door, process mapping is the foundational skill that makes all of that possible. Each section of this guide builds on the concepts introduced in the training, providing key frameworks, step-by-step instructions, and practical tools that enable you to document workflows accurately and improve them strategically. A companion Process Mapping Template is also available for download. This template provides a ready-to-use PowerPoint format you can bring back to your team for documenting and sharing your process maps.

## About the Authors

### **National Network of Public Health Institutes (NNPHI)**

NNPHI works to strengthen public health infrastructure and capacity across the United States. They bring together public health institutes, governmental public health agencies, communities, and other stakeholders to improve health outcomes nationwide through capacity building and technical assistance. NNPHI is one of CDC's National Partners for the Public Health Infrastructure Grant and coordinated the SLIDE training program.

### **Flourish and Thrive Labs (F&T Labs)**

Flourish and Thrive Labs is a consulting firm that brings public health expertise and data modernization experience to support health departments in building sustainable data systems. The team describes itself as "for Public Health, by Public Health" and as "tech nerds with a heart"—combining technical knowledge with deep understanding of public health operations and challenges.



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## What is Process Mapping?

At its simplest, a process map is a visual diagram that shows every step in a workflow—who does what, in what order, and where decisions get made along the way. Think of it as getting workflows out of people's heads and onto paper—so your whole team can see, understand, and improve how work actually gets done.

The hard part isn't drawing the map. The hard part is getting everyone in the room to agree on what the process actually is. Because in most organizations, if you ask three people how something gets done, you'll get three different answers. And usually, all three of them are right—they're just describing different versions of the same process.

You'll hear different names for this kind of work: flowcharts, workflow diagrams, swim lane diagrams, Standard Operating Procedure maps, and business process diagrams. These terms get used interchangeably depending on who you're talking to and what sector they came from. For our purposes, we use "process map" as the umbrella term.

### Key Insight

Process mapping surfaces differences and makes the invisible visible. It takes knowledge that lives in people's heads and turns it into something your whole organization can see, use, and build on.

A process map of how things work today—your current state—is just the starting point. Once you can see the workflow clearly, you can start asking: Where are the bottlenecks? What steps add value, and which ones are just legacy? What would this look like if we designed it from scratch? That's future state mapping—and it's where the real improvement happens. But you can't get there without first documenting where you are.

More than anything, process mapping changes how your team thinks about work. Instead of "Sarah handles that" or "ask Mike, he knows," you start seeing work as a series of steps that anyone with the right training could follow. That shift matters. It moves your organization from depending on individuals to depending on systems—which is more resilient, more equitable, and more scalable.

## Why Process Mapping Matters?

You can implement process mapping in your organization immediately. Public health departments can use process mapping for:

### **Quality Improvement**

If you've ever sat in a meeting where everyone agrees something isn't working, but nobody can quite agree on why—that's usually a process problem. When you map a workflow, you almost always find steps that are redundant, handoffs that get dropped, or places where the process depends on one person doing something a certain way that nobody else knows about. You can't fix what you can't see.

### **Onboarding**

Think about the last time you brought a new staff member on. How did they learn how things actually get done? Usually the answer is: they shadowed someone, asked a lot of questions, and figured it out over time. A process map changes that. It gives new staff a real picture of how work flows—not just what the policy manual says, but what actually happens.

### **Accreditation**

For those working toward PHAB accreditation or already accredited, documenting how your department operates is a significant part of that work. Process maps are exactly the kind of evidence that supports accreditation standards—and they're especially useful for cross-jurisdictional sharing arrangements, where you need to show that processes are standardized and transferable.

### **Succession Planning and Business Continuity**


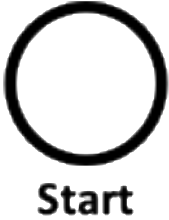
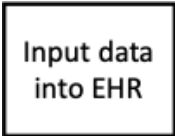


What happens when your key person is out? What happens during a surge, or a transition in leadership, or a reorganization? If your workflows only exist in someone's head, you're one resignation away from a gap. Process maps are how you build organizational resilience.

### **AI Readiness**

You cannot responsibly automate a process you haven't documented. AI works best on workflows that are stable, well-defined, and understood. Process mapping is step one. Regardless of where AI fits in your organization's priorities right now, the work of process mapping has value for reasons that have nothing to do with AI.

## Process Mapping Fundamentals

Process maps use a visual language that's simple once you know it. Here are the five essential elements you need to document almost any workflow. They are also on the second page of the process mapping template.

Element of the Process Map	Symbol
<p><b>Swim Lanes</b> - Separates the map by role or responsibility. Each lane represents a person or team, involved in the process.</p>	
<p><b>Start/End Events</b> - Marks the beginning and end of the process. Every map needs a clear start event (what triggers the process) and end event (what defines completion).</p>	
<p><b>Activities</b> - Represents a single action taken by a specific person. Each activity should start with a verb: "Gather ingredients," "Review application," "Send notification." Activities should also include any technology that is needed to complete that activity, e.g. an EHR.</p>	
<p><b>Exclusive Gateways (Decision Points)</b> - Shows where the process branches based on a yes/no question or multiple options. Paths may converge later or lead to different endpoints.</p>	
<p><b>Parallel Gateway</b> - Indicates steps that happen simultaneously rather than sequentially. All paths must complete before the process continues.</p>	

### **Understanding Swim Lanes**

Before you map a single step, ask: who is involved in this process? Every role that touches the process gets its own lane. When an activity moves from one lane to another, that's a handoff—and handoffs are almost always where things get dropped, delayed, or done inconsistently.

### **Understanding Decision Points**

Decision points show where the process hits a fork in the road. They can be simple yes/no questions ("Does this require supervisor approval?") or have multiple paths ("What type of case is this?" with options like confirmed, probable, or suspect). That means it's a place where training matters, where inconsistency can creep in, and where a new employee might do something different than a veteran.

### **Understanding Parallel Activities**

Parallel activities are steps that happen at the same time rather than one after another. In process mapping, we show this with a diamond that has a cross (plus sign) through it, rather than an X. That's your signal that all these paths need to happen, and they can happen simultaneously. Parallel activities often represent some of the easiest wins in process improvement.

## **Facilitator's Guide**

This section provides everything you need to plan, facilitate, and follow up on a process mapping session with your team.

### **Choosing Your First Process**

The hardest part of process mapping isn't the methodology—it's choosing the first process. Once you start looking, you'll see candidates everywhere. Ask these four questions to find your starting point:

1. *Where is work most dependent on one person?*  
If someone called out sick tomorrow and didn't come back for two weeks, where would things fall apart? That's a process worth mapping.
2. *Where do things most often get dropped or delayed?*  
Every organization has a workflow that's notorious for falling through the cracks—the handoff that never quite happens, the step that depends on someone remembering to do it.
3. *Where does your team spend time they shouldn't have to?*  
Repetitive work. Answering the same questions over and over. Doing manual steps that feel like they should be easier.
4. *Where are you about to lose knowledge?*

Is someone retiring soon? A long-tenured staff member moving to a new role?  
That institutional knowledge walks out the door unless you capture it.

### Key Insight

**Start Small** - You don't need to map everything. Pick the process where the answer to one of these questions is loudest—and start there.

### Session Overview

- **Duration:** Plan for 90 minutes to 2 hours for initial mapping.
- **Participants:** Aim for 4-8 people—the process owner, frontline staff, a supervisor, and cross-functional partners who touch the workflow.
- **Materials:** Whiteboard or flip chart, sticky notes, markers. For remote sessions, use a digital collaboration tool like Lucidchart or Visio.
- **Facilitator:** Choose someone who does NOT own the process. They'll ask better questions.
- **Mapper:** Assign someone to capture the map in real time so the facilitator can focus on the conversation. The facilitator and mapper can be the same person if needed.

### Before the Session

- **1-2 Weeks Before**
  - Identify the process to map and confirm scope with the process owner
  - Identify participants—ensure every role that touches the process is represented
  - Send calendar invitations with a brief description of the purpose
  - Gather any existing documentation (SOPs, job aids, previous maps)
- **Day Before**
  - Test your technology (projector, digital tools, video conferencing)
  - Prepare materials (sticky notes in multiple colors, markers, flip chart paper)
  - Review any existing documentation
  - Prepare your opening explanation of process mapping
  - Consider making a process map from any existing documentation so that you can familiarize yourself with the process you will be mapping
- **Who to Invite** - The most common mistake is mapping a process with only managers present. Managers know how a process is supposed to work. The people doing the work every day know how it actually works. You need the second version.

## Session Agenda

- **Opening (10 minutes)**
  - Welcome and introductions
  - Explain the purpose: "We're here to document how [process] actually works today"
  - Set the ground rule: We're mapping what IS, not what SHOULD BE
  - Brief overview of process mapping notation (circles, rectangles, diamonds)
- **Define the Boundaries (15 minutes)** - Work through these three questions with the group
  - Question 1: Who is involved in this process?
    - List every person, role, team, or system that touches the process. Create a horizontal swim lane for each one. If you discover a missing role during mapping, add it.
  - Question 2: What triggers the process to start?
    - Define your start event—what sets the whole process in motion. Examples: "Application received," "Customer calls," "Report deadline arrives."
  - Question 3: What does completion look like?
    - Define your end event. This matters more than people expect. In public health, it's the difference between "report submitted" and "report reviewed and acted on." Between "referral sent" and "client connected to services."
- **Map the Process (45-60 minutes)**
  - Work through the process chronologically. For each step, ask:
    - "What happens next?"
    - "Who does that?" (Place in correct swim lane)
    - "Are there any decisions that need to be made here?"
    - "What if the answer is no?" (Branch for decision points)
    - "Can any of these steps happen at the same time?"
  - Tips for mapping activities:
    - Each activity has one verb and one outcome—if you're using "and," you probably have two activities
    - When work moves from one person to another, that's a handoff—draw the arrow across the lane boundary
    - Decision points don't have to be yes/no—they can have multiple paths
  - Facilitator Tip - When you hear "it depends," that's usually a decision point. When you hear disagreement, document both versions—ask "what

happens 95% of the time – this often prevents the tendency to map every possibility which might not be needed.

- **Review and Validate (15 minutes)**
  - Walk through the complete map from start to end
  - Ask: "Does this capture what actually happens?"
  - Ask: "What did we miss?"
  - Note any open questions or areas of disagreement
- **Close and Next Steps (10 minutes)**
  - Thank participants for their time and insights
  - Explain next steps: clean up, validation with people not in the room, final version
  - Set timeline for sharing the draft
  - If appropriate, discuss plans for future state mapping

### **Useful Facilitator Questions**

Keep these questions handy during the session:

- Getting started - "Walk me through what happens when [trigger event] occurs."
- Unclear ownership - "Who is responsible for making sure this happens?"
- Hidden steps - "Is there anything that has to happen before you can do that?"
- Decision points - "What information do you need to decide which way to go?"
- Exceptions - "What happens when something goes wrong here?"
- Reality check - "What happened the last time this came through?"
- Disagreement - "Let's capture both versions—which happens more often?"

### **Common Facilitation Challenges**

- Dominant voice - Directly invite quieter participants: "Sarah, what do you see happen at this step?"
- Scope creep - "That's important—let's capture it as a related process to map separately."
- Ideal vs. actual - "I hear you that it should work that way. What actually happens?"
- Too much detail = "Let's stay at this level for now—we can drill down later if needed."
- Conflict over facts - "Let's note both versions and check the data after the session."
- Running long - "We have 15 minutes left. Let's focus on getting from here to the end."

### **After the Session**

- Within 48 Hours
  - Clean up the map and transfer to a digital format
  - Add any clarifying notes or annotations
  - Send draft to all participants with a request for feedback

- Within 1-2 Weeks
  - Validate with people who weren't in the session—they will almost always catch something. Take the map back to the people who do the work—especially anyone who wasn't in the room—and walk through it step by step. Ask them – “Does this reflect what actually happens? Is anything missing? Is anything wrong?”
  - Incorporate feedback and resolve open questions
  - Finalize and distribute the current state map
  - If appropriate, schedule a follow-up session for future state mapping, i.e. what would you team want the process to be.
- Keep Your Maps Alive - A process map is not a one-time deliverable. Build in a regular review—even just once a year—to make sure your maps still reflect reality. A map that's two years out of date can cause more confusion than no map at all.

### **Recommended Tools**

Don't let the tool be the obstacle. For a live group session, the best tool is often the lowest-tech one—sticky notes on a whiteboard. For documenting and sharing afterward:

- PowerPoint/Google Slides – Good enough for most purposes; everyone has access. The attached template is built for Powerpoint.
- Lucidchart – Free tier available; intuitive drag-and-drop interface
- Miro – Excellent for remote collaboration; free tier available
- Microsoft Visio – Industry standard, but it does have a steeper learning curve