



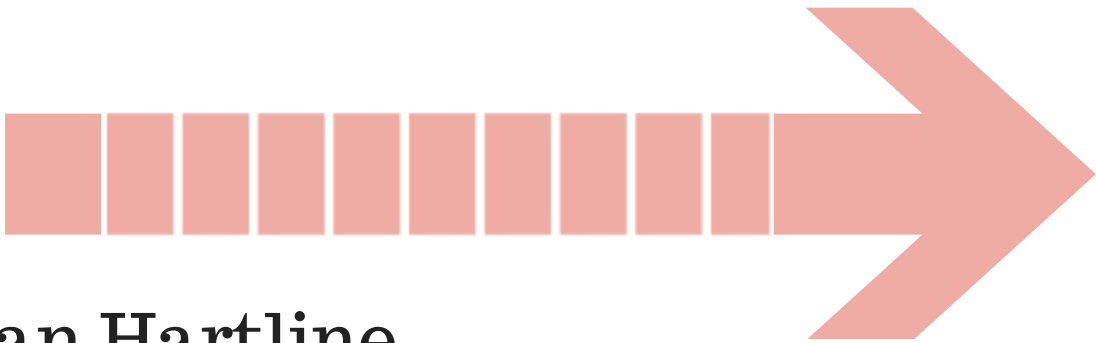
**Library**

**Orienteering:**



**Lean into Process**

**Mapping**



Megan Hartline

&



Sarah Barbrow



## WHAT

an exercise to identify the  
**major steps, decisions, actors**  
visually

## WHY

creates a **shared understanding** of a process,  
clarifies **responsibilities**,  
enables **training and education** of new team  
members by passing on **institutional knowledge**,  
drives **process improvement**

## HOW

**gain trust:** involve the right stakeholders (management, team members, those affected by the process)

**limit scope creep:** everyone understands & acknowledges the scope?

**gather information:** conduct interviews, focus groups, mapping activities with stakeholders and content experts

**table discussion as needed:** take a step back if disagreements muddle forward progress

**shop the map around:** revise after gathering feedback

## tips

Your process map is more important than the tools used to create it.

That said, here are a few tools you might consider:

- good old-fashioned pencil & paper
- whiteboards & post-its
- Microsoft Visio
- LucidChart
- gliffy
- draw.io
- omnigraffle

When considering a tool to enable your process mapping:

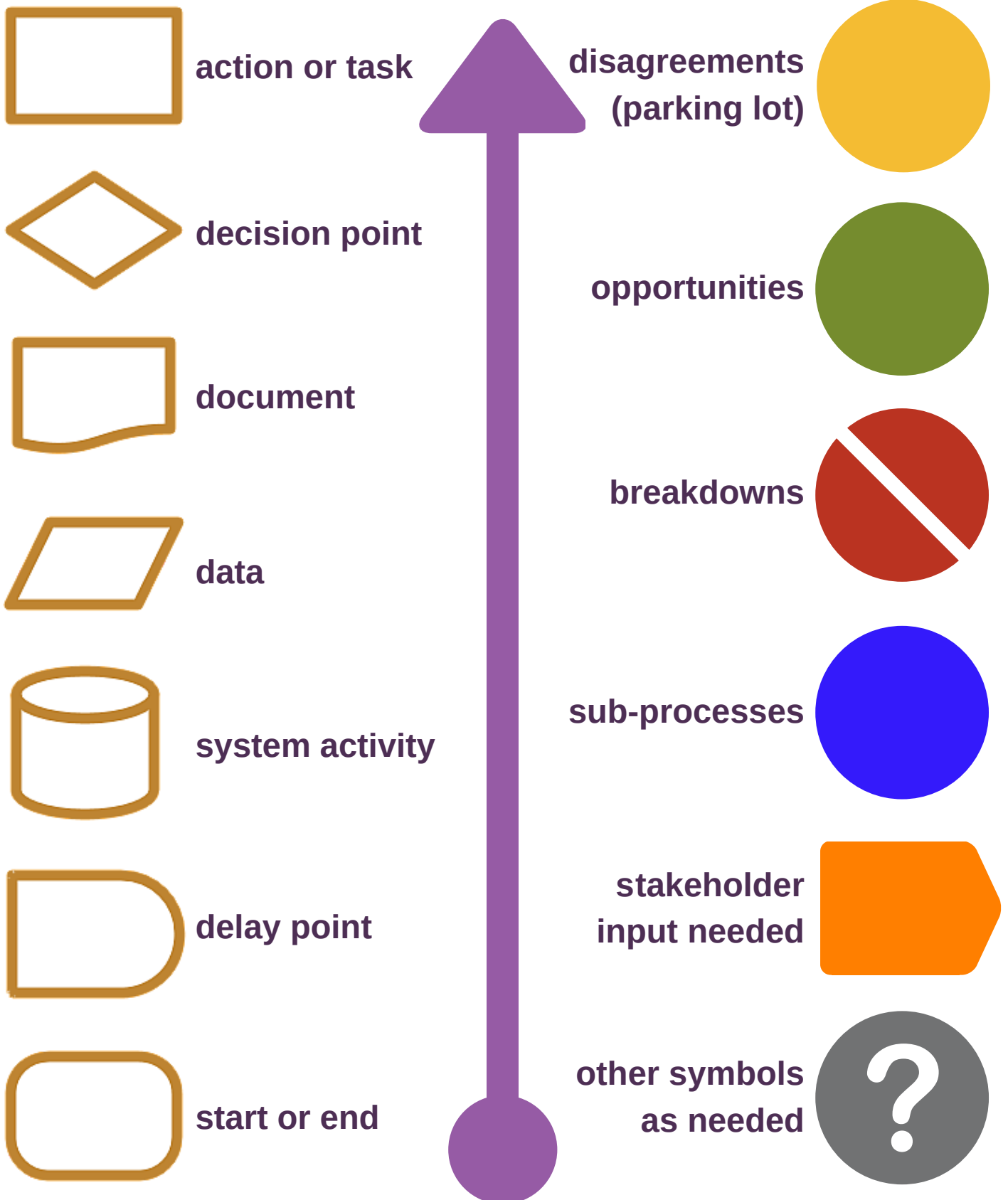
Consider using basic drawing software

Avoid Excel

Try the software before you buy anything

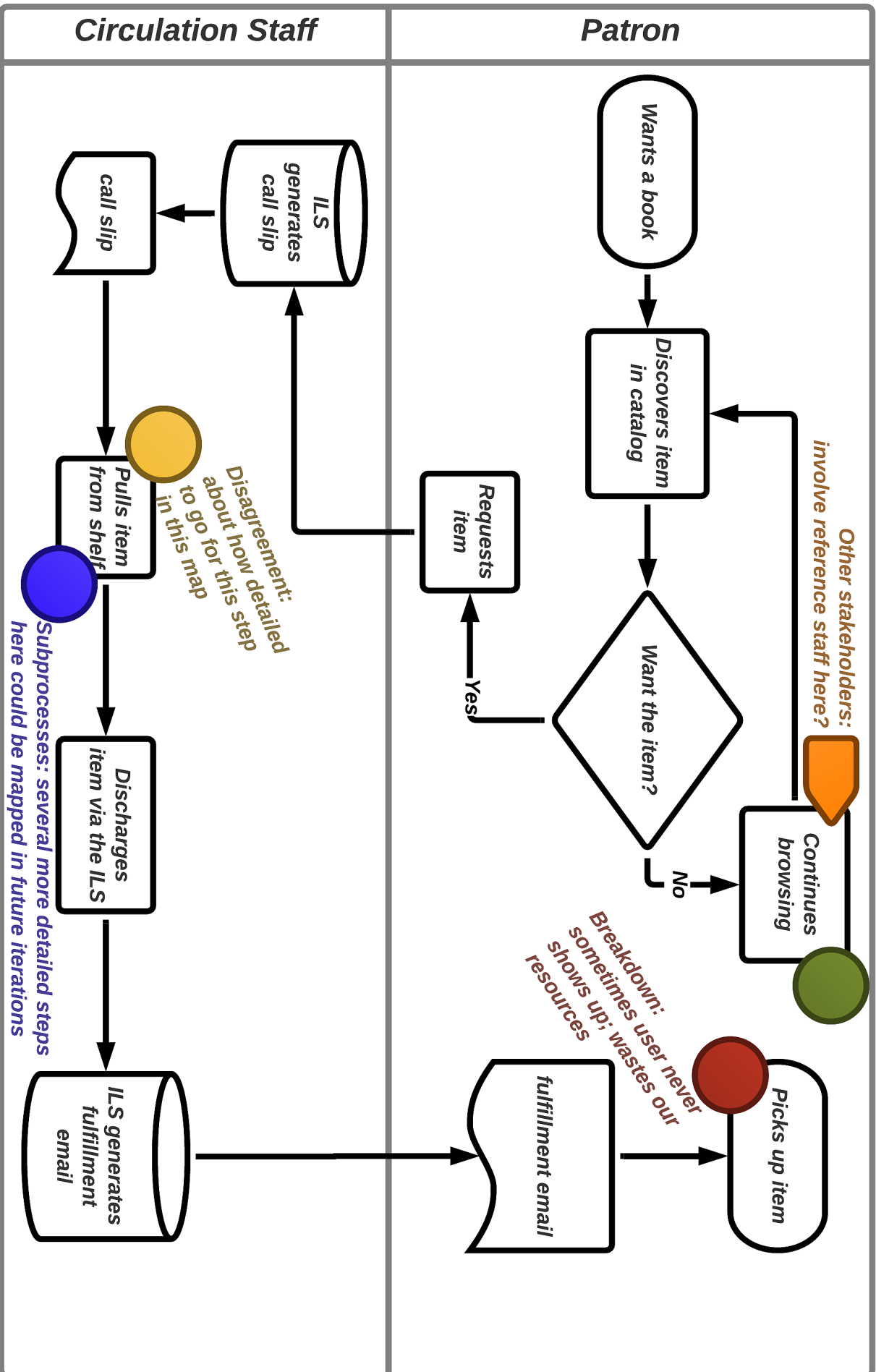
Pick something with a PDF export option

# Shapes & Dots



# Sample Map

Opportunity:  
how can we help patron be  
more efficient at this stage



## books

- Damelio, R. (2011). *The Basics of Process Mapping, 2nd Edition (2 edition)*. New York: Productivity Press.
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- Martin, K., & Osterling, M. (2013). *Value Stream Mapping: How to Visualize Work and Align Leadership for Organizational Transformation (1 edition)*. New York: McGraw-Hill.

## articles

- Barbrow, S.K., & Hartline, M. (2015).** Process Mapping as Organizational Assessment in Academic Libraries. *Performance Measurement and Metrics* (16)1.
- Fülscher, J., & Powell, S. G. (1999). Anatomy of a process mapping workshop. *Business Process Management Journal*, 5(3), 208–238.
- Holloway, K. (2004). The Significance of Organizational Development in Academic Research Libraries. *Library Trends*, 53(1), 5–16.
- Klotz, L., Horman, M., Bi, H. H., & Bechtel, J. (2008). The impact of process mapping on transparency. *International Journal of Productivity and Performance Management*, 57(8), 623–636.
- Kress, N. J. (2008). Lean Thinking in Libraries: A Case Study on Improving Shelving Turnaround. *Journal of Access Services*, 5(1-2), 159–172.
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**Megan Hartline**  
mhartline@umich.edu

**Sarah Barbrow**  
sbarbrow@wellesley.edu