Let's make a
PROCESS MAP!

Develop a process map for your team to use as a guide for completing that task. Remember, your process should be similar to standing over a map, looking down and drawing the route. Are multiple people required to accomplish your goal? Then your process should include an overview of when each step of the process needs to be passed on to the next person. Your process should provide a clear idea of what will occur to each employee involved.

First, **WRITE OUT** what goes into the chart. Then utilize Word, Excel or Powerpoint to create your images. You can also use this free site at www.lucidchart.com. See the map I created below using their template.

1. Step 1: Identify the problem: What is the process that needs to be visualized? ...
2. Step 2: Brainstorm all the activities that will be involved: ...
3. Step 3: Figure out boundaries: ...
4. Step 4: Determine and sequence the steps: ...
5. Step 5: Draw basic flowchart symbols: ...
6. Step 6: Finalize the process flowchart.

How to make a process flow chart in Word?
Adding shapes is pretty straightforward:
- Click the Insert tab on the ribbon.
- Click the Shapes dropdown.
- Click on the shape type you want to add.
- Click in the canvas area, holding the left button down while dragging the mouse to add the shape.

How to make a process flow chart in Excel?
Follow the steps as described below these images:
- 1 - Select All Cells. Click on the top left corner of the spreadsheet.
- 2 - Open Column Width Dialog. Right-click on any column and click on "Column Width".
- 3 - Set Column Width. ...
- Snap to Grid / Shape.
- Insert Shapes Gallery.
- Format Tab.
- Edit Shape menu item.

How to make a process flow chart in Powerpoint?
If you choose Shapes:
- A gallery will appear with an assortment of shapes, including lines, arrows, and geometric shapes. Click the shape you want to add, then click and drag on the page to place it. ...
- Continue to add shapes and connect them with lines until you've created your flowchart.

ENTREPRENEUR
Life Global

This map was created with the free process map option at www.lucidchart.com. Just make sure that you take the time to write out the steps BEFORE you create the actual map.

You can also use this site to create your Org Chart!

ELG New Customer or User Onboarding

Initial Engagement

| Product / service discovered | → | Customer reaches out with questions | → | Company rep answers questions | → | Customer signs up for product / service | → | Company sends thank you & communicates next steps (manual or automated process) |

| Customer is provided with links to support resources via email: | Online knowledge base (help center) | Online tutorial videos | User community forums | Direct Customer Service contact information: phone, email, chat, video calls, etc. |

Set-Up

| Customer information is updated into CRM or other database | → | Accounting / Billing details processed & set-up | → | User placed into tier or group for success/usage metric monitoring | → | Customer uses product / service for set period of time | → | Company rep reaches out to customer for feedback to assess experience or additional needs |

Follow-Up

| Customer feedback gathered & assessed based on success metrics | → | Customer is provided with opportunities to have any issues resolved or additional services offered | → | Company identifies any other customer needs | → | Company updates user information in CRM / system notes for record-keeping | → | Company sets follow-up if needed |

Customer / User Retention

| Keep customer informed of new product features or service upgrades | → | Send periodic thank you letters for patronage | → | Request periodic user feedback for QA or product / service planning | → | Continually recalibrate metrics & success goals | → | Implement needed changes to product / service based on feedback |