Process Optimization Bootcamp: Mapping, Fixing, and Rebuilding Workflows

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Objectives

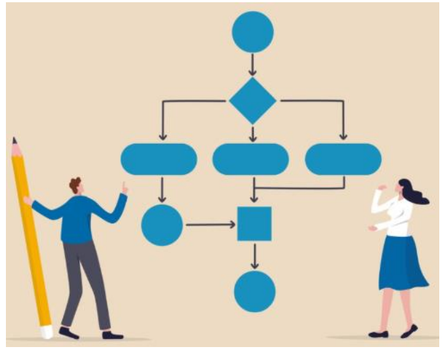
- Map processes
- Identify breakdowns
- Design future state workflows
- Apply improvements

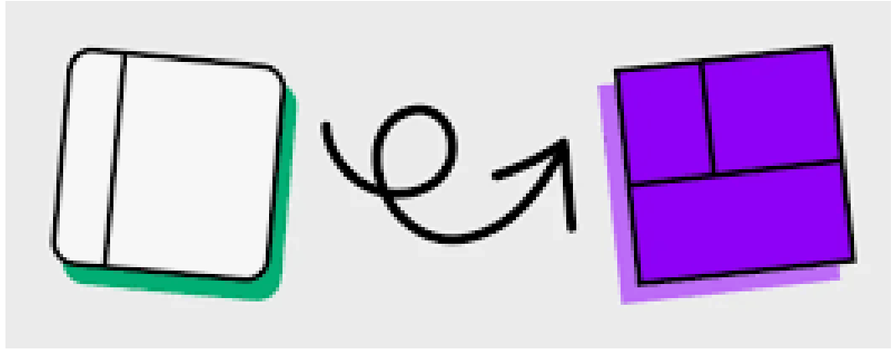
Where do you feel the most pain?

1. Invoice intake
2. Approvals
3. Exceptions
4. Month-end close

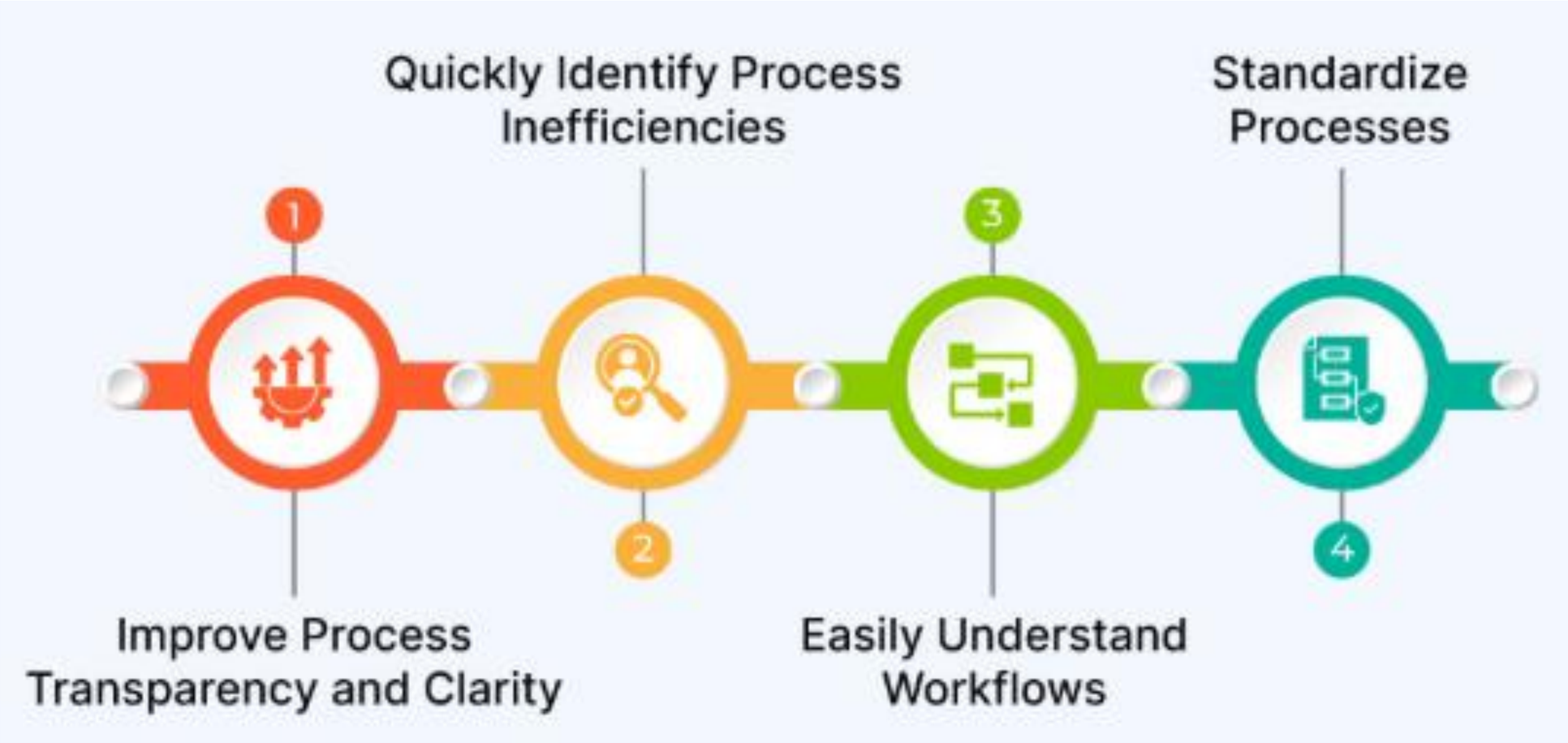
Process Framework

Map → Diagnose → Redesign → Optimize





Benefits of Process Mapping



Steps for Creating Process Map

STEP 1

Identify the Process Scope

First, identify the scope or problem that needs solving. Then, select the right type of process map that aligns with your goals.

STEP 2

Assemble a Process Mapping Team

Gather key stakeholders-those who participate in the process-for mapping. Collect insights on process inputs, outputs, activities, and roles.

STEP 3

Write Out the Sequence of Steps

This is where the rubber meets the road. Document the process using symbols like rectangles for steps and diamonds for decision points.

STEP 4

Break Down and Sequence the Steps

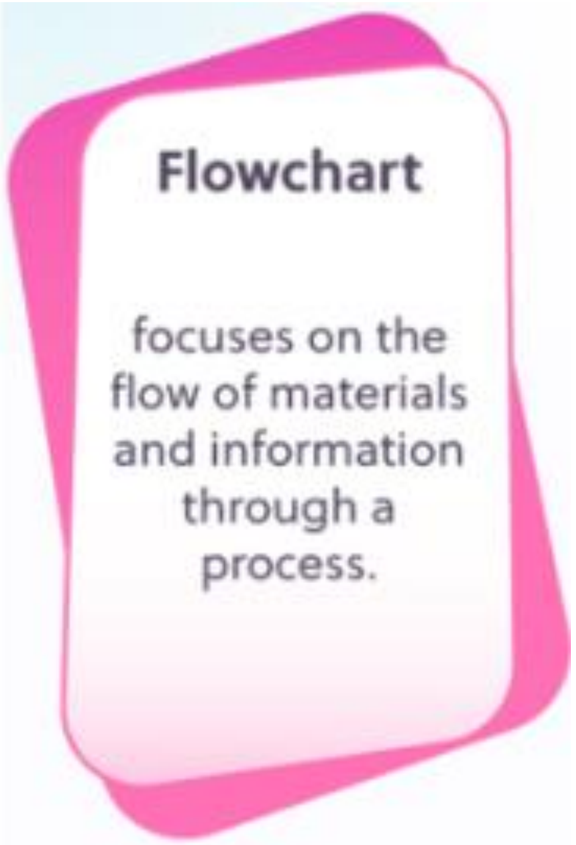
Granularity can be powerful. Breaking down the process into its parts-tasks, decisions, and events-provides a microscopic view.

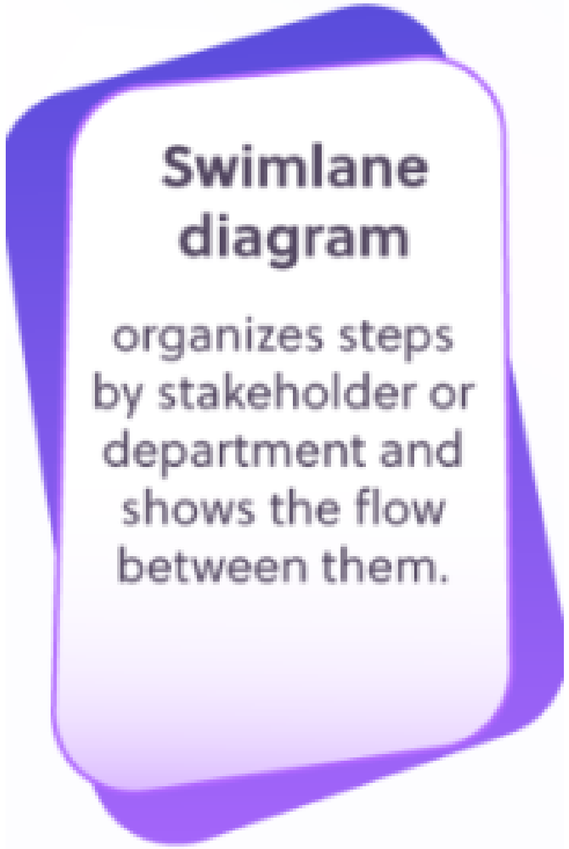
STEP 5

Validate and Optimize the Process

Once your team verifies the process map reflects a workflow, it becomes a living, breathing tool for continuous improvement.

Types of Process Maps

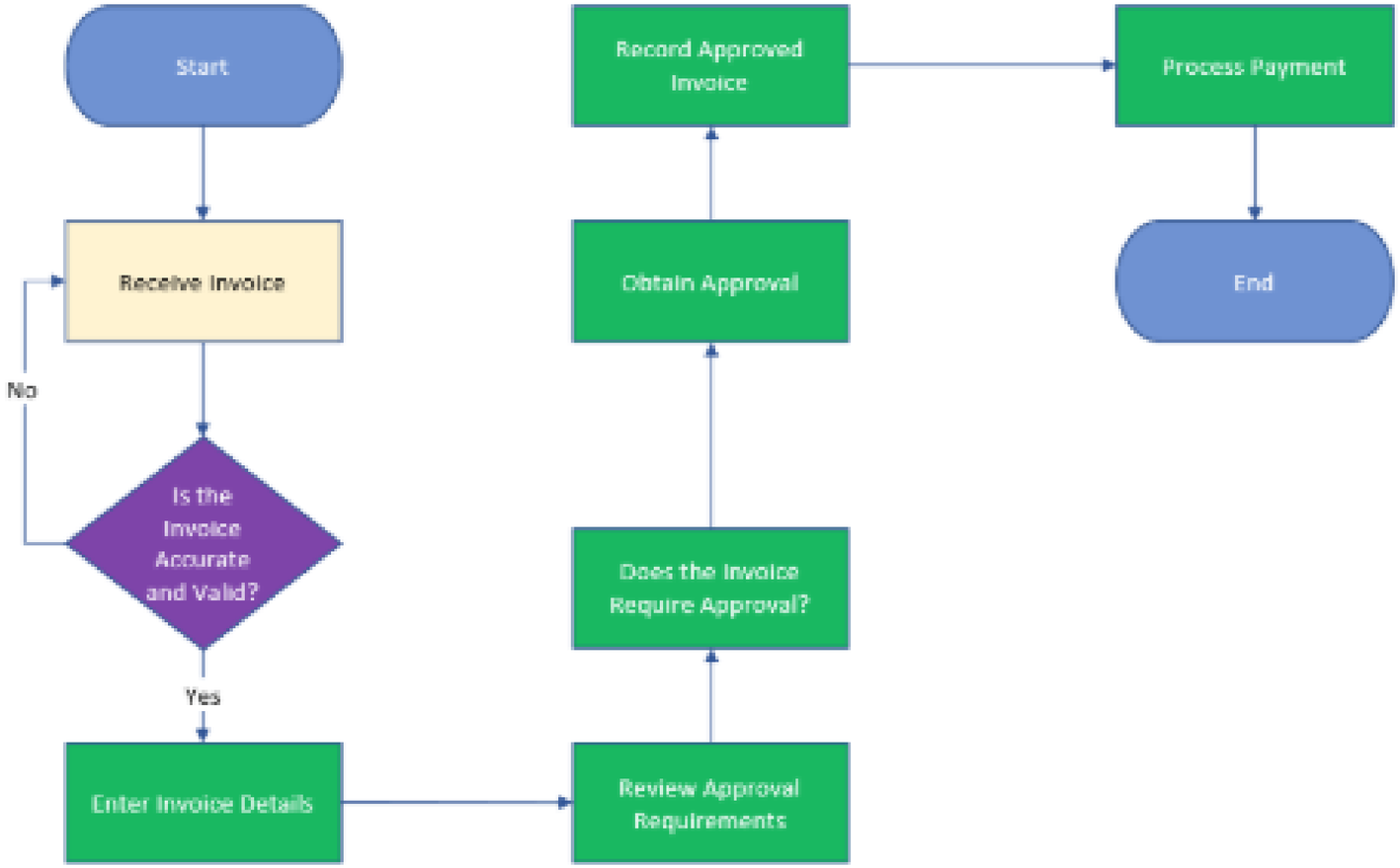




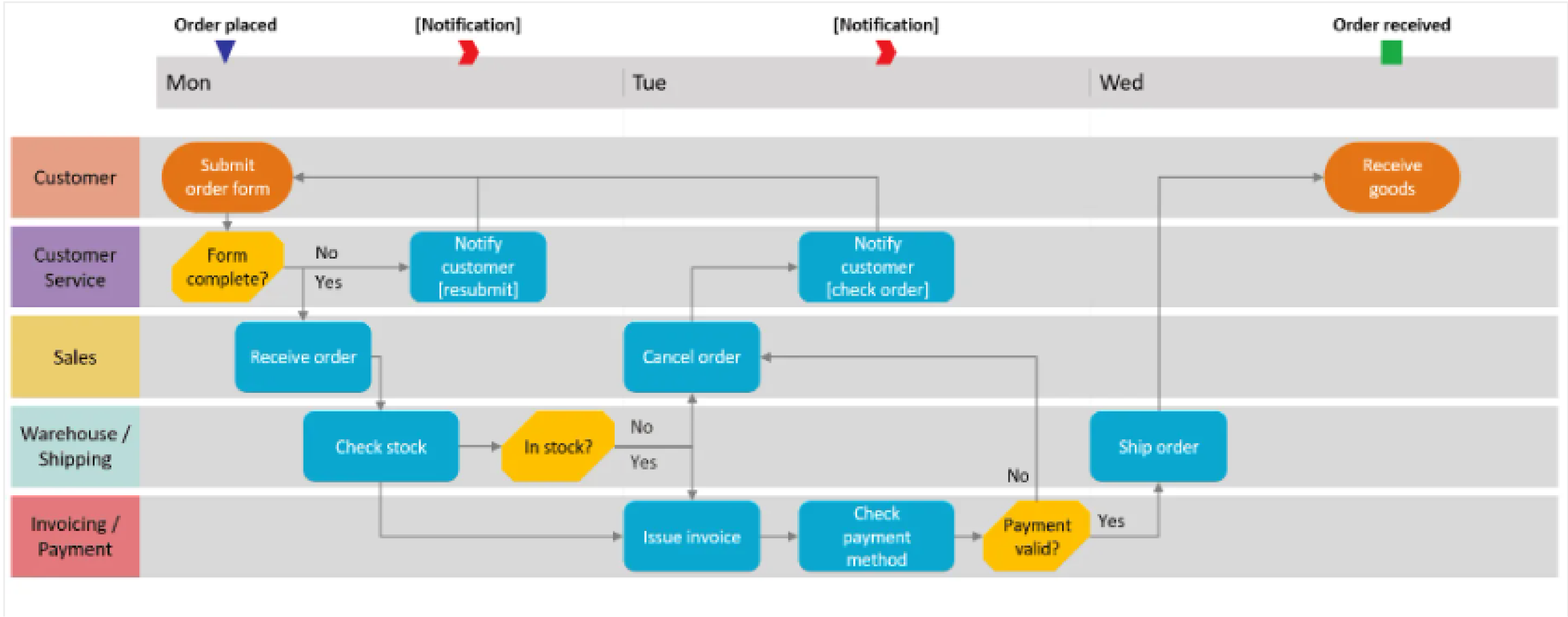
Key Symbols When Process Mapping

Symbol	Name	Function
	Process	A rectangle represents a process.
	Start/end	An oval represents a start or end point.
	Decision	A diamond indicates a decision.
	Input/Output	A parallelogram represents input or output.
	Arrows	A line is a connector that shows relationships between the representative shapes.

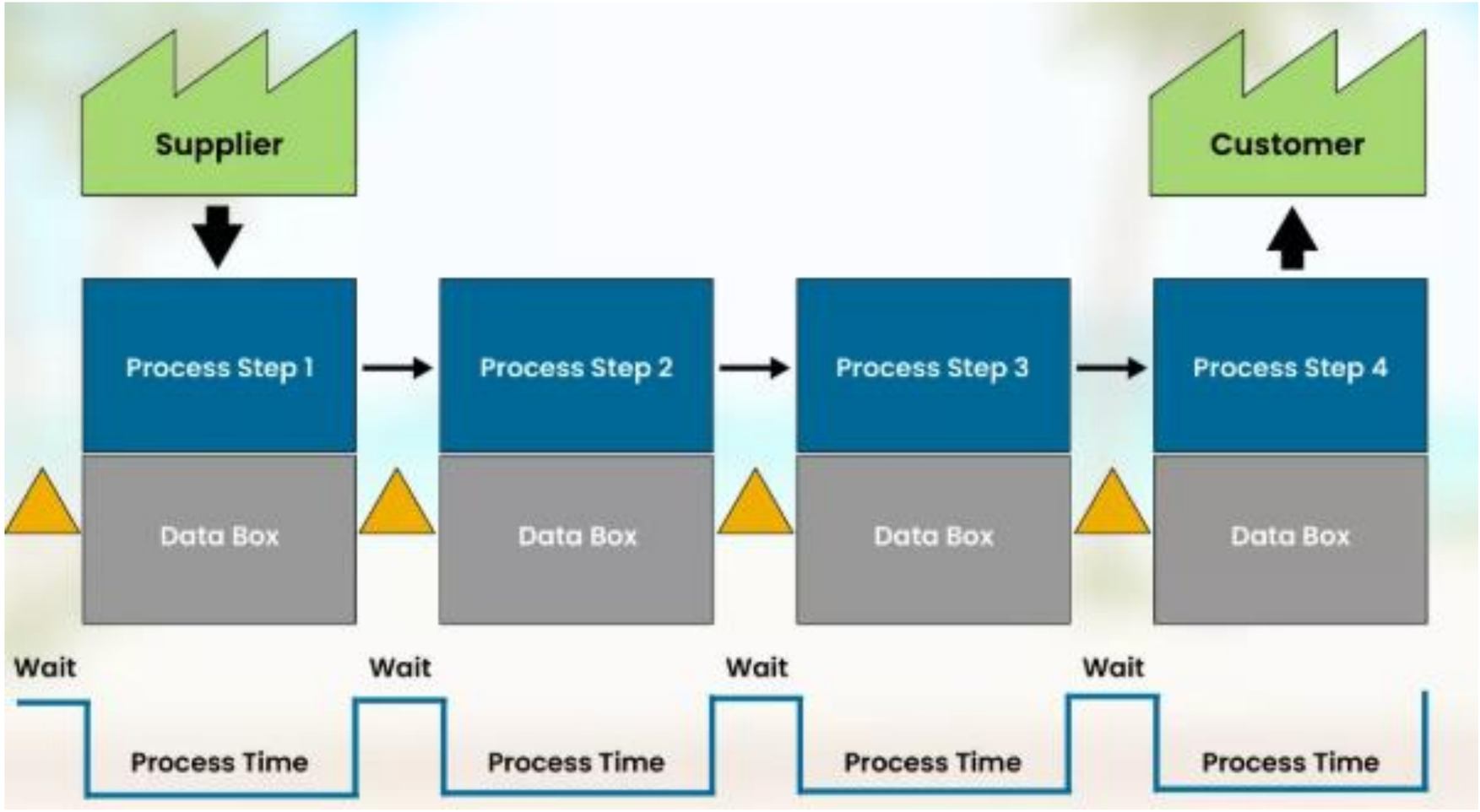
Flowchart Process Map



Swimlane Diagram



Value Stream Map



Where to start?

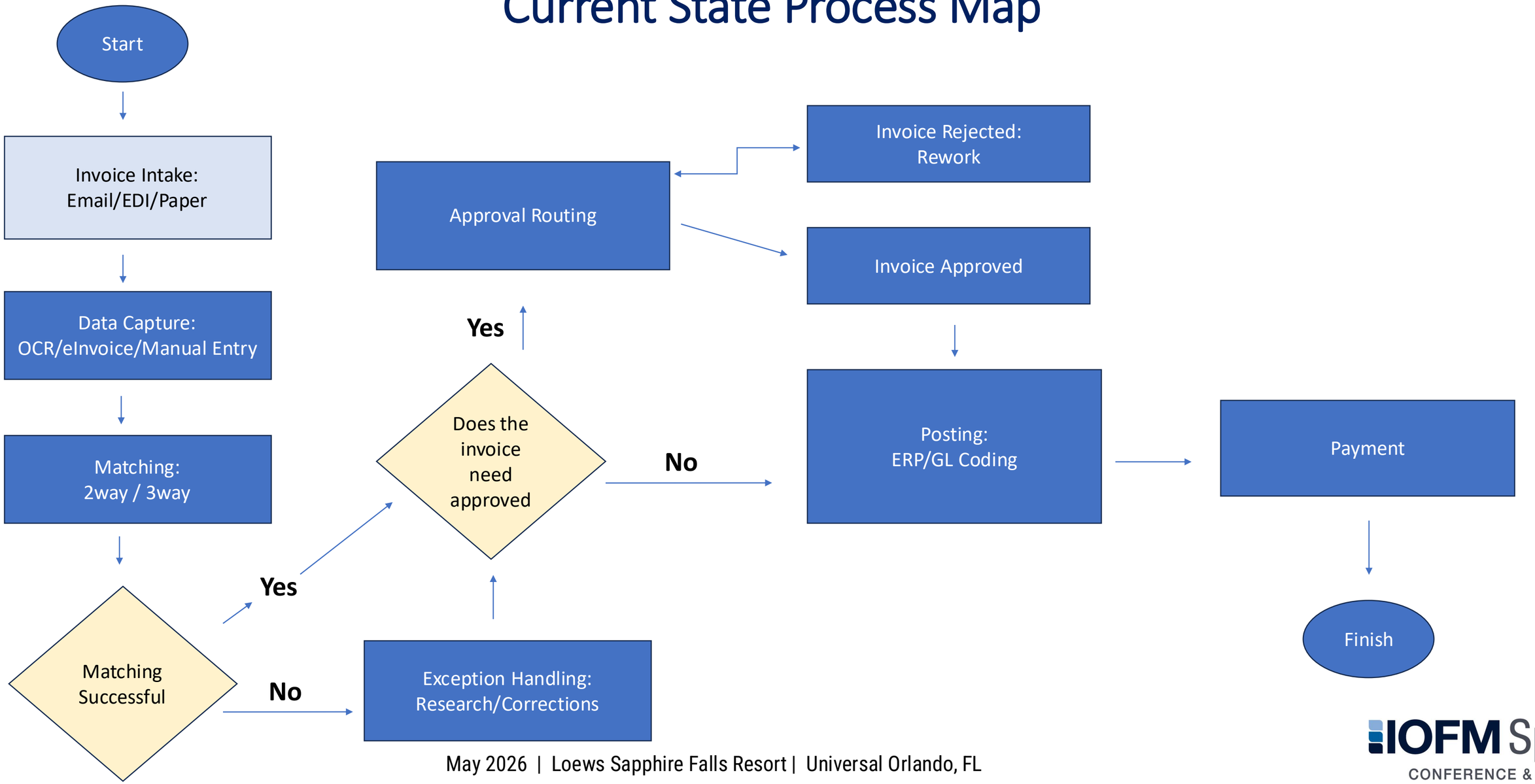
What to Map:

- Invoice intake
- Data capture
- Matching
- Approval routing
- Exception handling
- Posting
- Payment

How to Map:

- Use 5-7 key steps
- Identify:
  - Who owns each step
  - Inputs/Outputs
  - Systems involved

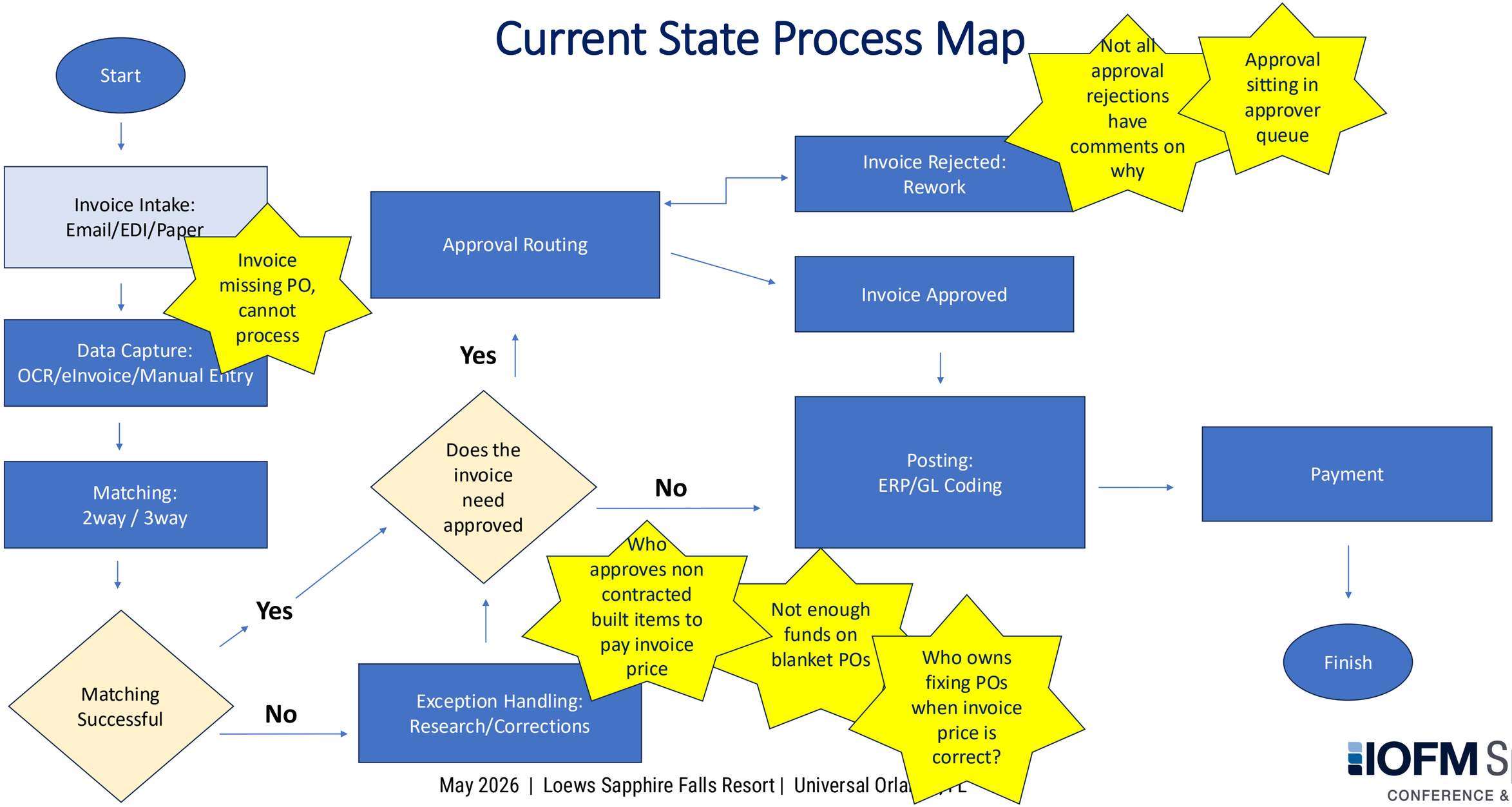
Current State Process Map



Where Processes Break

- Intake
- Data entry
- Approvals
- Exceptions
- Vendor Issues

Current State Process Map



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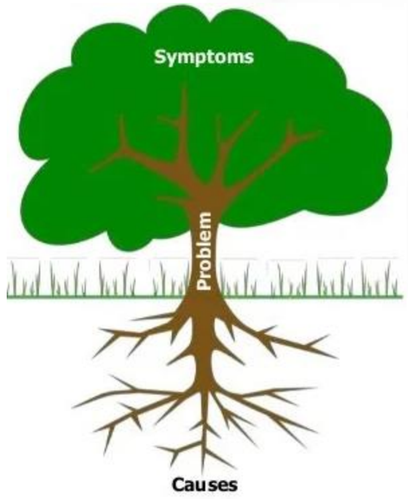
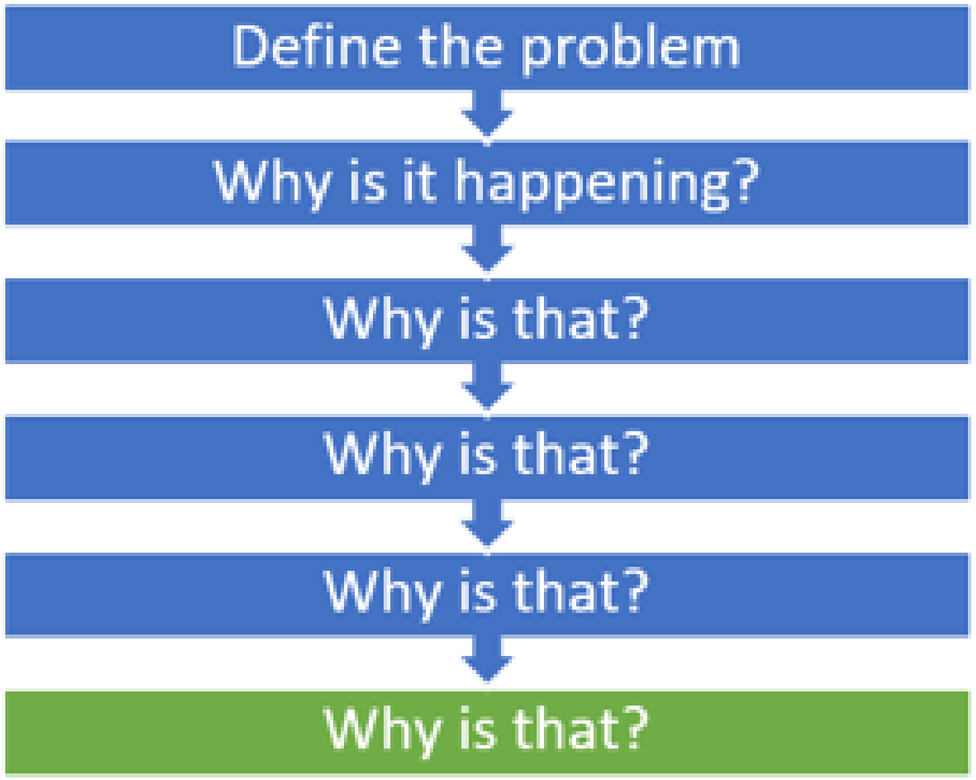
Root Cause Analysis



5 Whys Technique



Problem: Invoice not paid

Why: Invoice could not be processed

Why: Invoice did not have PO, returned to supplier

Why: Supplier never received PO number

Why: Order placed by phone from end user without giving a PO number

Root cause Why: End user did not get PO prior to placing order with supplier

Common Root Causes in AP

- Poor invoice quality
- Weak upstream controls (Procurement, vendor setup, contracted pricing)
- Overly complex approval hierarchies
- Manual exception routing

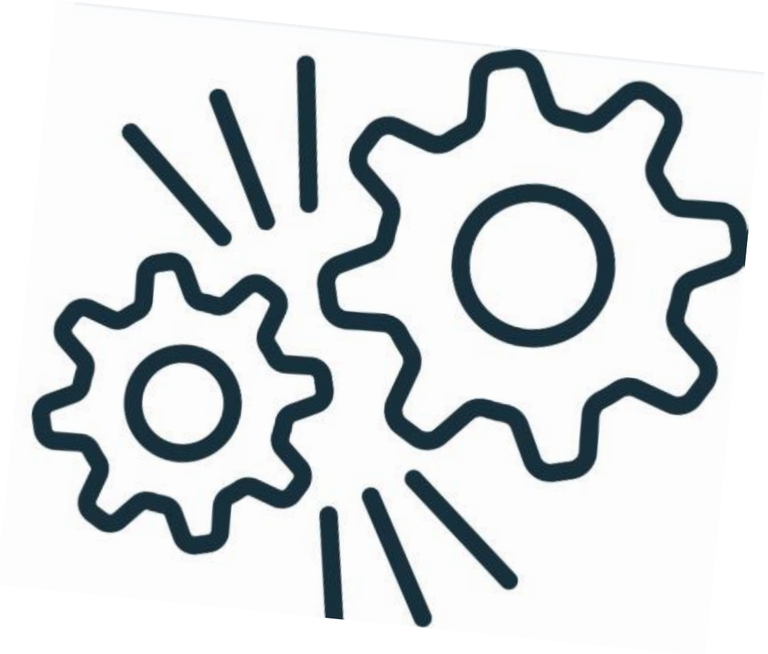
Most AP problems do not start in AP

Where do you see rework happening most often?

- Take a minute to think about this question.
- Share with your neighbor.
- How many of you shared the same rework happening most often?

Where is the friction?

- Invoice Intake: EDI/eInvoice/Portal [Low friction when standardized]
- Data Capture: OCR/manual entry [Moderate friction: poor quality PDFs, missing data]
- Validation: Duplicate check, vendor match [Moderate friction: inconsistent formats, errors]
- Matching: PO/receipt/invoice mismatch [High friction: POs do not match invoice, pricing discrepancies]
- Exception Routing: Sent to AP/Procurement/requester [High friction: unclear ownership, delays]
- Exception Handling: Research, corrections, resubmission [High friction: rework loops]
- Approval Routing: Workflow assignment [Moderate friction: too many approvers, unclear rules]
- Approval: Waiting on responses [High friction: bottlenecks, email chasing]
- Posting: ERP entry [Low friction when automated]
- Payment: ACH/Check/Wire [Low friction when scheduled plus automated]



- Low Friction (Automated / Efficient)
- Moderate Friction (Manual Touchpoints)
- High Friction (Delays / Rework / Bottlenecks)

What is your top improvement priority?

1. Automation
2. Process redesign
3. Data quality
4. Controls optimization

If you could fix one issue, would any of these help to improve it?

Can it be removed?

Automated?

Standardized?

Future State Process Map

Why create a future state process map?

- A tool to eliminate the pain points identified in the current state map
- Serves as a blueprint for strategic change
- Illustrates how processes should function once improvements, automation, or new technologies are implemented

Designing the future state is where impact happens.

Designing Future State

Future State Principles:

- Simplify before automating
- Eliminate unnecessary steps
- Standardize wherever possible
- Automate repetitive decisions

Introduce Redesign Levers

- Remove steps
- Combine steps
- Automate steps
- Create standardization
- Shift ownership

Improvement isn’t just technology

Future State Questions

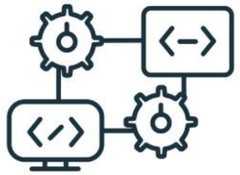
- What can be touchless?
- What truly needs approval?
- What can be standardized?

Don’t digitize inefficiency – design it out.

AP Benchmarks

Invoice cycle time: 3–5 days (best-in-class)

Cost per invoice: $2–5



Touchless rate: 60%+

Invoice Processing

Before:

- Manual entry
- Multiple touchpoints

After:

- Automated capture (OCR/EDI/AI)
- Straight-through processing (STP)

Approvals

Before:

- Email chasing
- Layered approvals

After:

- Rule-based routing
- Threshold-based approvals

Exception Handling

Before:

- Reactive and manual

After:

- Categorized exceptions
- Predefined resolution paths

Month-End Close

Before:

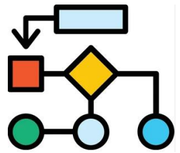
- Last-minute close

After:

- Continuous close mindset
- Real-time visibility

Action Plan

❖Pick **ONE** process next week



Map it

Find the friction

Fix one thing

Key Takeaways

- Map simply – but map clearly
- Focus on friction, not just steps
- Fix root causes, not symptoms
- Design before automating
- Align process with volume, staffing, and compliance

Please tell us what you think!

- Please scan this QR code using your mobile to access a short feedback survey →
- Also accessible via the mobile app

TUES 3:00 | Process Optimization Bootcamp: Mapping, Fixing, and Rebuilding Workflows

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QUESTIONS?

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