



**HIGH-YIELD METHODS**

*for customer-aligning business strategy, process & technology*

## **Presenting CRM Process Support Requirements to IT**

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**P**resenting process support requirements to IT (or to a software vendor) is half art, half science. The “art” part is documenting for IT how and what information has to function from person to person, from function to function and between outside stakeholders and employees. And that means mapping, but with a twist.

If you’ve read our whitepaper, [Visual Workflow](#), you’ll already be familiar with how VW maps workflow and information flow as a single entity, and why VW maps use literal symbols instead of process symbology. But if you haven’t, in office process (also called human process or knowledge worker process) work relates to information much differently than in manufacturing. Work is creating, modifying, receiving and sending information, which makes workflow and information flow inseparable.

Regarding the unusual mapping style, mapping with literal symbols effectively communicates with business-side people with no prior process experience. That’s a key difference between VW and manufacturing process approaches.

### ***Three communication steps***

An important side benefit of mapping workflow flow/information flow together is simultaneously producing information flow documentation for IT, which can work right off your workflow maps to identify the requisite systems architecture for supporting process. Here are sample “as is” and “to be” maps of the same function.













