

Effective Documenting of Processes and Process Flow Charting

CPE Credits: 16 (2 days)

Course outline:

Documentation of processes is a critical element in any organization. An adequately documented process can serve several purposes

- Capture the process know-how within the organization;
- Independence from dependency on individuals;
- Enable identify potentials risks within the system;
- Enable exception criteria;
- Assist in training of new employees;
- Facilitate the audit requirements of external and internal auditors; and much more.

But just how far do you go? Is there any set format and template for documentation? How are process characteristics considered when documenting the process? This course will provide the attendee with answers to these questions and much more. Through discussions and workshops over a 2-day period, this course shall enable the attendee to benefit from real-life examples.

The course is aimed at participants who need to document their processes (either as a task procedure or process flow) or auditors who document the process flow as part of their work-papers. Participants will be able to adequately document their working procedures with added understanding of characteristics in a process flow.

Pre-requisites: There are no pre-requisites to this course

Level: Beginner to Intermediate

Course Objectives:

On completion of this course the attendee will be able to:

1. How to go about documenting business processes
2. Understand the need for documentation of processes
3. The essentials of Document Control
4. The basics of a good Document Control system
5. Alternative ways to document processes
6. Process Flow charts
7. Incorporating critical characteristics within the procedures
8. A natural extension of procedures to risk identification & management

Agenda:

Day 1:

Introductions - Let's get to know each other
About the training program - Let's capture some expectations
The Need for Documenting - "One Version of Truth"
Documenting (Making a cup of tea)
Document Control
Documentation and Auditing - Different Perspectives
Process Documentation
Commonly used methods to document processes
What's in store for tomorrow

Day 2:

Recap of Day 1
Key to Documenting a Process
Process Documentation & Flow Charting
Reference to Standards
Expanding to Risk Management - A Natural Extension
End of Course and Feedback session