Your guide to choosing and using the right...

Level of detail.

Choose the right level of detail for your process documentation using this workbook.

MiddleStone
Business Analysis

Introducing levels of detail

The purpose of this workbook is to help you decide what level of detail you need for your process documentation.

What is a level of detail?

You can think of the different levels of detail as 'zooming in' or 'zooming out' your view of your business. The process stays the same, but the amount of information we show about the process changes.

An example of zooming in

For example, imagine you needed to send a paper copy of an invoice to a customer:

You find the record on your computer, open it, and print it. The printer prints the invoice on two pages, so you staple them together, fold them, and insert them into an envelope. You hand write the address on the envelope and seal it. Later, you walk down to the post box and mail the envelope.

Would you always want to describe the process in this amount of detail? Is that useful? But where do you draw the line?

- There are 11 verbs in the description above. You could describe this process as 11 separate tasks.
- You could also describe this as just 1 task; 'Send copy invoice'.
- Or really, you could describe this process at any level in between those two extremes; in anything from 1 to 11 steps.

And that is what we're aiming to decide now; where to draw the line between too much information and too little detail.

Why is this important?

It's important to get the right level of detail so that your finished process documents are genuinely useful.

Too much detail will over-complicate your documentation. This can make it off-putting or frustrating to read through.

But at the other extreme, if they contain too little detail, your process models will also not be helpful: they will not provide you with the information you need.

Why decide now?

It is best to decide on the correct level of detail early in the planning process. Because the level of detail will affect:

- how much work is required to gather the information needed to map your processes,
- the best way to gather information, and therefore
- how long it will take, and
- how much the project will cost.

If the finished process model doesn't show the correct level of detail, then you'll have wasted your time and money. You may even have to redo the exercise to get the results you need.

Using more than one level

It's common to use different levels of detail in different places within the same document.

You may need more than one level

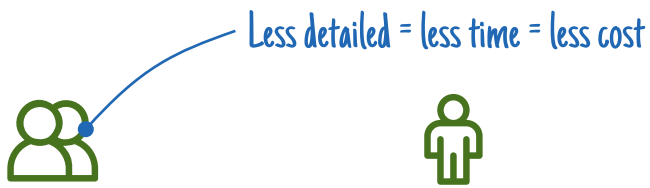
For example, a process manual may include:

- an introduction to the business prepared at a high level, and
- process diagrams showing processes illustrated to a medium-level detail, and also
- work instructions prepared at the most detailed level.

Just be consistent. For example, starting each chapter with a high-level overview before getting into more detailed explanations is a good idea. Constantly switching levels is not.

Our standard levels of detail

There are many ways to specify levels of detail, but here we describe seven levels to make it easier for you to decide.



Team level

→ page 9

Each step (a rectangle on a process model or a paragraph of text in a manual) describes a job that *one team* does before passing the process on to another team.

Role level

→ page 12

Each step (a rectangle on a process model or a paragraph of text in a manual) describes a job that *one person* does before passing on the process to another person.

Output level

→ page 14

Each rectangle on a process model or paragraph of text in a manual describes the work needed to *produce a finished output*.

'Tool level' is usually a good starting place. You can then move up or down the levels from there

Tool level

→ page 17

Each step describes a job that one person does, *using one tool* before using another tool or passing the process to another person.

Screen level

→ page 20

Each rectangle on a process model or paragraph of text in a manual describes a computer screen (or printed page) that the worker uses.

Button level

→page 23

Each paragraph of text describes a button that the worker presses to save data or move on to the next step.

Field level

→page 25

Each paragraph of text describes a data input.

More detail

Choosing the right level...

The level of detail you need will depend on what you're aiming to achieve.

Be clear on your objective

When you are certain what you'll use your documentation for, you can establish what information you'll need.

Look through our examples

In this workbook, we'll look at each level in turn.

Look through our examples and find the level of detail that will give you all the information you need, but for the least amount of effort.

We can help you decide.

We can discuss your project with you and help you choose the best level of detail.

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Stand-alone process maps—to help improve the process, for example.

Work instructions—step-by-step instructions.

Standard operating procedures—to show how your firm does tasks.

...for your project

Use cases—to show how users will interact with a system.

Customer guides or manuals—showing how to use your services.

Customer journey— to show interactions with your customers.

Download our guide to documentation types: middlestone.ltd/download

An operations manual—a complete manual for your whole business.

Let’s look at each level in detail

Team level

At this level of detail, each step of your process describes a job that one team does before passing the process on to another team.

But what is a team?

This is open to interpretation. Your organisation may not be split into identifiable teams.

You can decide what represents a 'team' for your purposes. It could be a whole department or a smaller unit. The answer will depend on your business structure and the reason why you're mapping your processes.

We can help you decide.

We're happy to discuss this with you and help you find the right answer for your purposes.

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Advantages

This level of detail:

- Is quick and easy to prepare.
- Can identify the team—using swimlanes.
- May show inputs and outputs from the process.

Disadvantages

This level of detail:

- Doesn't identify which tools or software applications are being used in the process.
- Doesn't include details about activities that are happening within the team.
- Isn't enough detail to identify process improvement opportunities.

When is this level of detail suitable?

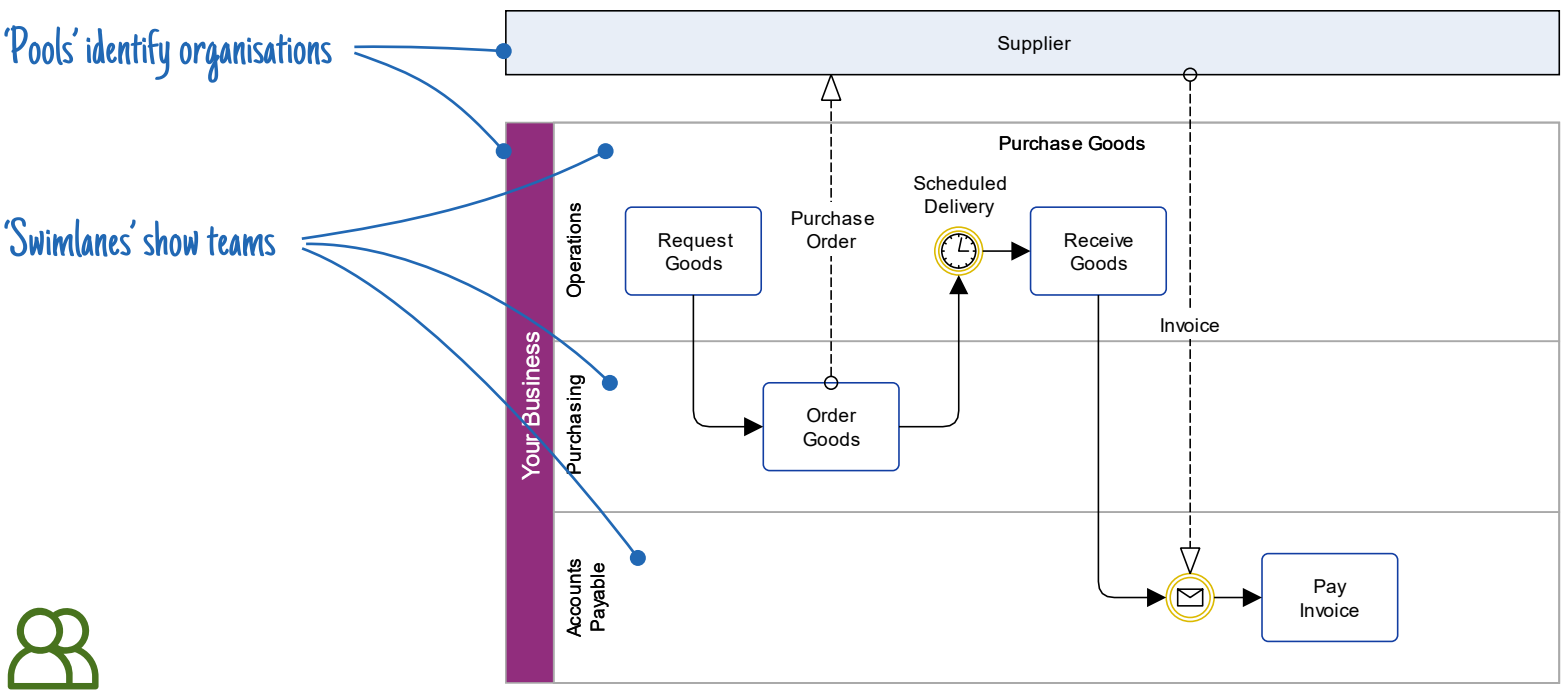
This level of detail is only really useful for introductory material, or large organisations looking for a high-level overview of their business processes.

This could be to:

- Provide an introduction to external stakeholders, such as investors.
- Provide background information for executives—especially non-executive directors who may not be familiar with the organisation's operations.

What does 'team level' look like?

Team level provides a high-level model of your business' processes, as illustrated below in a hypothetical process to order goods:



Role level

At this level of detail, each step of your process represents work that one person performs before passing on the process to another person.

Advantages

This level of detail:

- Is quick and easy to prepare.
- Can identify the participant using swimlanes.
- May show inputs and outputs from the process.

Disadvantages

This level of detail:

- Doesn't identify which tools are used in the process
- Doesn't include detail of multiple steps performed together so may hide the complexity of the process.

When is this level of detail suitable?

It's very common to see process models drawn to this level of detail. This level of detail is useful to visualise interactions between staff.

This could be part of:

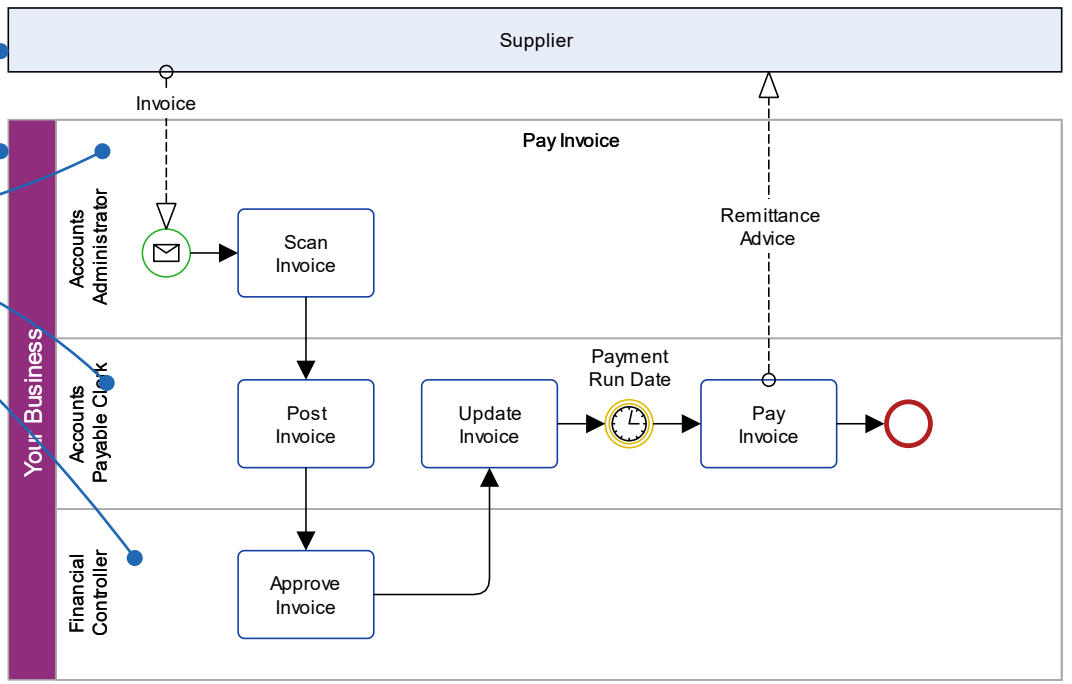
- Use cases.
- Standard operating procedures.
- An operations manual.

What does 'role level' look like?

The 'Pay Invoice' activity from the hypothetical goods ordering process that we used in the last section, is illustrated below to 'role level':

'Pools' identify organisations

'Swimlanes' show roles



Output level

At this level of detail, each step of your process describes the work needed to produce a finished output.

But what counts as an output?

Normally, an output is anything produced by the process. Sometimes outputs are very easy to identify, other times you may have to clarify this.

We recommend limiting your definition to tangible outputs, so not including things like electronic records created in databases or intangible things like customer satisfaction.

We can help you decide.

We're happy to discuss this with you and help you find the right answer for your purposes.

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Advantages

This level of detail:

- Identifies the participants in the process using swimlanes.
- Includes inputs and outputs from the process.

Disadvantages

This level of detail:

- Doesn't show the relative amount of work needed to produce each output.

When is this the right level?

This level of detail is useful to visualise the outputs being created by a process.

We have had success using this level of detail in legal practices, where the team use a limited number of tools—primarily a practice management system—but produces many different documents, forms, and messages.

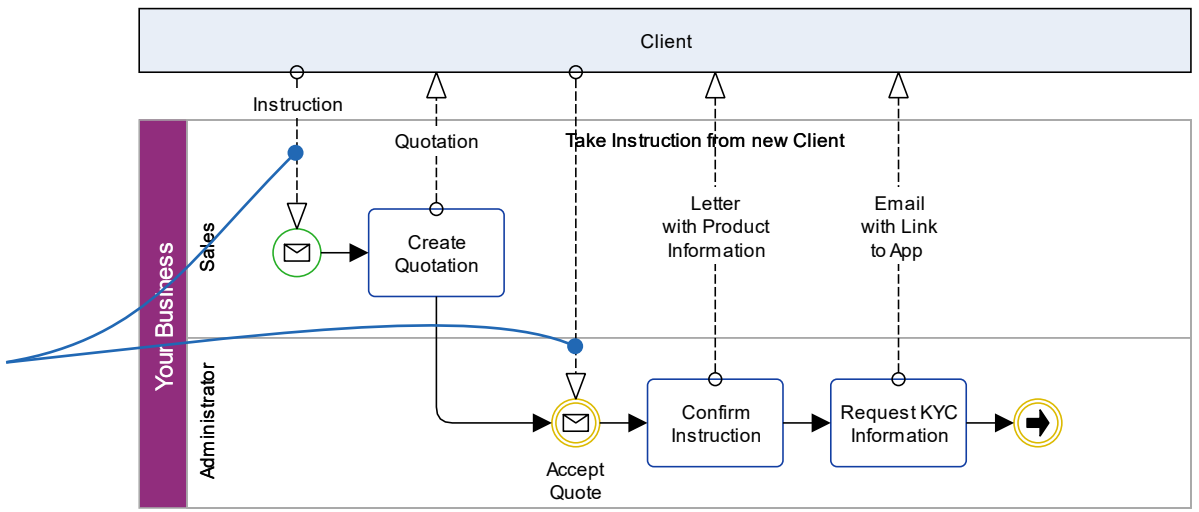
This level of detail is also useful for creating checklists of outputs that need to be produced.

This could be as part of:

- Use cases—to show what users will need to produce from a system.
- Customer journey—to show what messages or materials the customer will receive.
- Standard operating procedures—a description of how your firm does a certain task.

What does ‘output level’ look like?

This is a BPMN process model illustrated to ‘output level’:



Message flows show inputs and outputs

Tool level

At this level of detail, each step of your process describes work that one person performs, using one tool before moving to another tool or passing the process to another person.

What is a tool, in this scenario?

Generally, we mean exactly what we all recognise as a tool—there is nothing special or technical about our definition. For manufacturing and construction operations (for example), we would include each workshop machine and construction vehicle as tools.

However, do use common sense when deciding what should be included in your process models as a 'tool'. This is to keep your process models as simple as possible.

For example, you might use a computer for most tasks, but we wouldn't include 'Turn on the computer' as a task, because this doesn't add any value to the process model. We recommend you exclude the computer itself from your definition of a tool.

We can help you decide.

We're happy to discuss this with you and help you find the right answer for your purposes.

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Standard procedures

Operations manuals

Options at this level

You may decide to ignore certain other tools when preparing your process maps, or you may decide to extend the definition of a tool to include some extra things.

For example, you may decide to exclude the method of communication from your definition of 'tool' to avoid complicating a process diagram with email, phone, or chat apps.

Or, if you use a lot of spreadsheets, rather than just showing work being completed in Microsoft Excel, you may want to treat each spreadsheet as a tool.

Advantages

This level of detail:

- Can identify the participant using swimlanes.
- Can include inputs and outputs from the process.
- Can identify which tools are used in the process.
- Can identify duplications when more than one system is needed.

Disadvantages

This level of detail:

- Doesn't include detail of multiple steps performed together using the same tool.

When to use this level of detail

This level of detail is useful to visualise interactions between staff and the different tools they use.

This could be to develop:

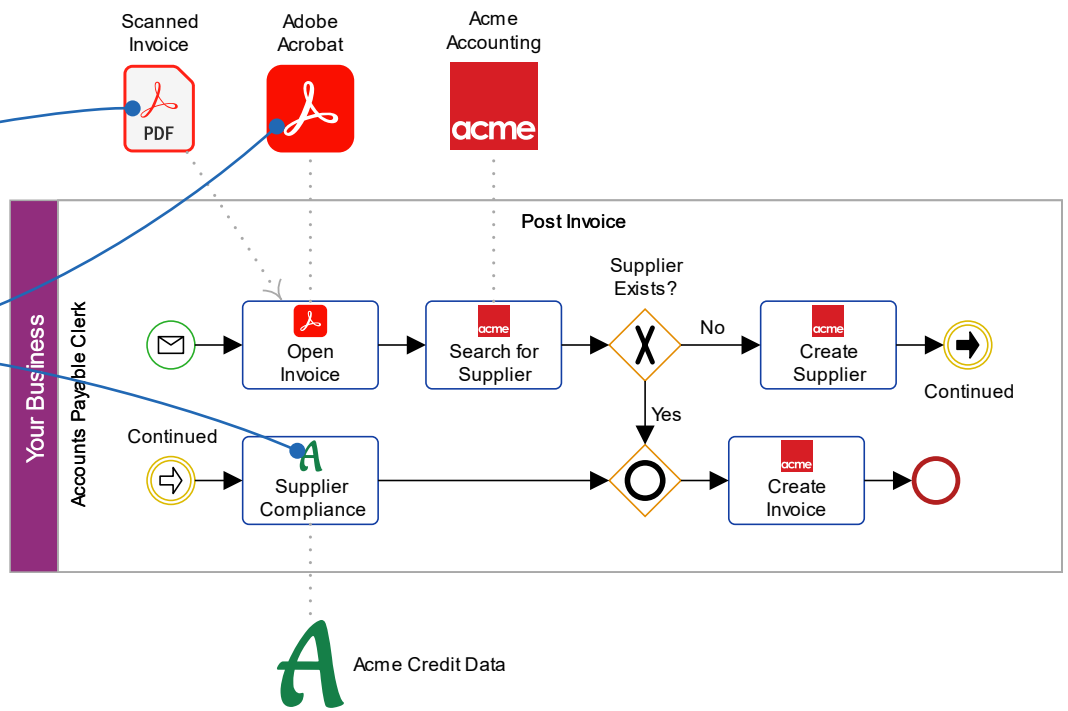
- Standard operating procedures.
- An operations manual.

What does ‘tool level’ look like?

This illustrates the ‘Post Invoice’ activity from the ‘role level’ example, now drawn at ‘tool level’:

File type icons identify inputs and outputs

Logos identify each tool used



Screen (page) level

At this level of detail, each step of your process describes a computer screen (or printed page) that the worker uses.

Define ‘screen’

For computer-based work, what constitutes a ‘screen’ can sometimes be tricky to identify. For cloud-based tools, in particular, it may not be obvious when you’ve moved from one page to another.

When we’re working to this level of detail, we follow these rules:

- If the view changes from a list of items to an individual item from the list, we'd treat this as a new screen.
- If the view changes to display a different entity or different type of entity, then we'd treat this as a new screen.
- In other cases, when *most* of the screen has changed, we'd treat this as a new screen.

You may decide on your own definition.

We can help you decide.

We’re happy to discuss this with you and help you find the right answer for your purposes.

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Advantages

This level of detail:

- Identifies the participants in the process using swimlanes.
- Includes inputs and outputs from the process.
- Identifies which tools are used for each step.
- Includes detail of multiple steps performed together—so gives a really good indication of the effort involved.

Disadvantages

This level of detail:

- Is slightly more time-consuming to produce that 'tool' level.
- Can be slightly ambiguous to decide when the user is moving from one screen to another (see above).
- Doesn't include detail of individual pieces of data.

When is this the right level?

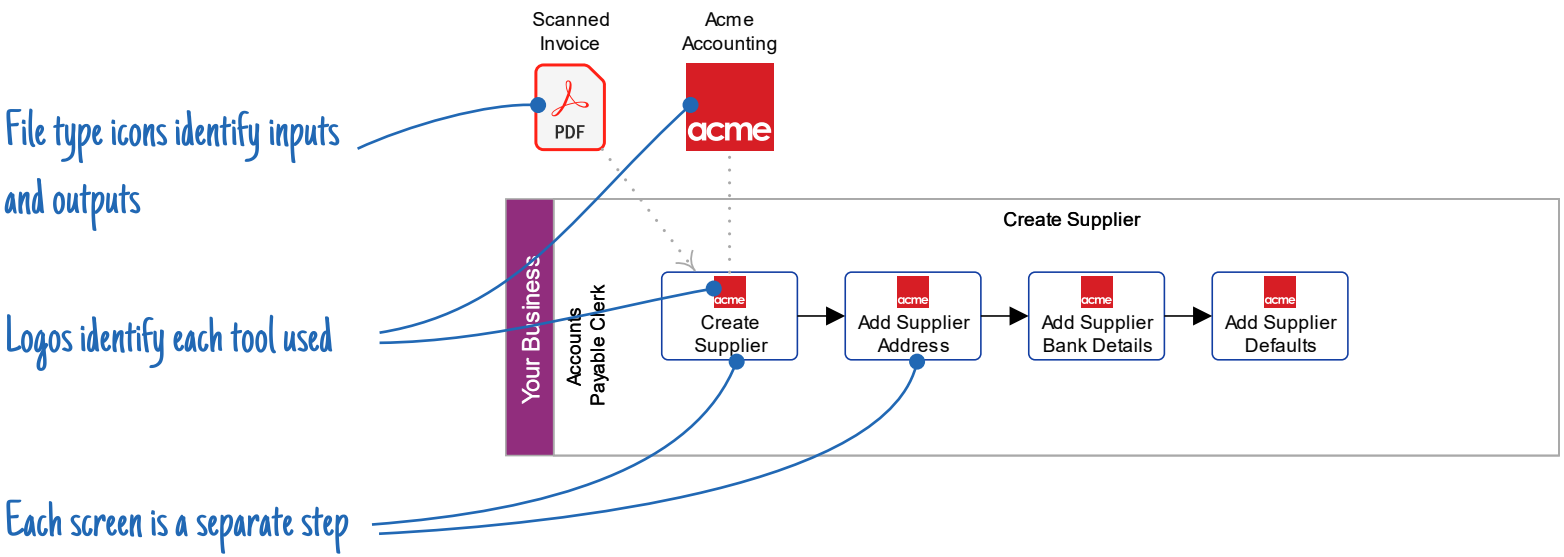
This level of detail is useful to visualise your team's interactions with your tools. It is especially useful if you plan to change systems or design a new system.

This could be as part of:

- Use cases—to show how users will interact with a system.
- Standard operating procedures—a description of how your firm does a certain task.

What does ‘screen level’ look like?

The ‘Create Supplier’ activity from the hypothetical goods ordering process that we used in the last section, is illustrated below to ‘screen level’:



Button level

At this level of detail, your process documentation focuses on individual buttons that the worker must press, click, or tap and items of data that the worker enters or updates.

Advantages

This level of detail:

- Can include inputs and outputs from the process.
- Can identify which tools are used.
- Does include detail of multiple steps performed together.
- Does include detail of individual pieces of data.

Disadvantages

This level of detail:

- Isn't practical to draw to this level of detail.
- Is very time-consuming to prepare.

When is this level of detail suitable?

This level of detail is appropriate for work instructions.

This could be in:

- Work instructions—step-by-step instructions.
- An operations manual—a complete manual to describe every aspect of your business operations.

What does ‘button level’ look like?

It’s not practical to draw process models to this level of detail. The excerpt below shows how this would be presented as work instructions:

1. Click *Supplier Addresses* to open the supplier address list.
2. At the bottom of the screen, click *Add*.
3. Enter *Address Line 1* and *Postcode* from the supplier invoice, then click *Lookup*.
4. Select the correct address from the dropdown list and click *Save*.
5. Click *Close* on the supplier address list.

Each instruction ends with a button being pushed

Field level

This level represents the most detail. At this level of detail, each paragraph of text describes a data input.

Advantages

This level of detail:

- Can include inputs and outputs from the process.
- Will identify which tools are used
- Can include details about every operation in the process.
- Does include detail of individual pieces of data.

Disadvantages

This level of detail:

- Isn't practical to draw, so must be expressed as a narrative description.
- Is the most time-consuming to prepare.

When is this level of detail suitable?

This level of detail is appropriate for work instructions.

This could be in:

- Work instructions—step-by-step instructions.
- An operations manual—a complete manual to describe every aspect of your business operations.

What does ‘field level’ look like?

It’s not practical to draw process models to this level of detail. The excerpt below shows how this would be presented as work instructions:

...

2. At the bottom of the screen, click *Add*.
3. For *Address Line 1*, enter the house name or number from the supplier invoice.
4. Enter the *Postcode* in the format AA1 1AA.
5. Click *Lookup*.
6. Select the correct address from the dropdown list
7. Click *Save*.

...

Each instruction describes a single input

Field level is also good for technical specs

If you're designing a new system from scratch, then you'll also need field level to capture how you want the system to work. Like this:

Name	Type	Validation
Add	Button	
Address line 1	Text	
Postcode	Text	Format AA1 1AA
Lookup	Button	Lookup from Royal Mail
Save	Button	

Each row describes a single input

Talk to us if you want help

You've now looked through seven possible levels of detail. If you'd like some assistance, we're happy to help.

How we can help

At Middlestone, we have years of experience working with small and mid-sized businesses to document and improve their processes.

We can:

- Advise you on the best approach for your process documentation project.
- Advise you on tools to help you document your processes.
- Talk to your front-line staff and document their processes for you in a consistent and easy-to-use style.
- Show you tools to effectively share your finished process documentation with your team.

And don't worry, our consultants are lovely. They'll work with each member of your team using a down-to-earth, non-threatening and non-judgemental approach.

Benefits of using Middlestone

When using Middlestone, you'll get:

- Process documents prepared to a high quality.
- Quicker turnaround.
- A consistent style across the organisation.
- Very little interruption to your teams' day jobs.

Disadvantages

The only disadvantage we could think of would be the cost to your business. But don't forget that you'd have to pay your own staff for their time working on process documentation too!

So, get in touch:
middlestone.ltd/contact

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