Stonebanks

Workflow Process Document

About This Document

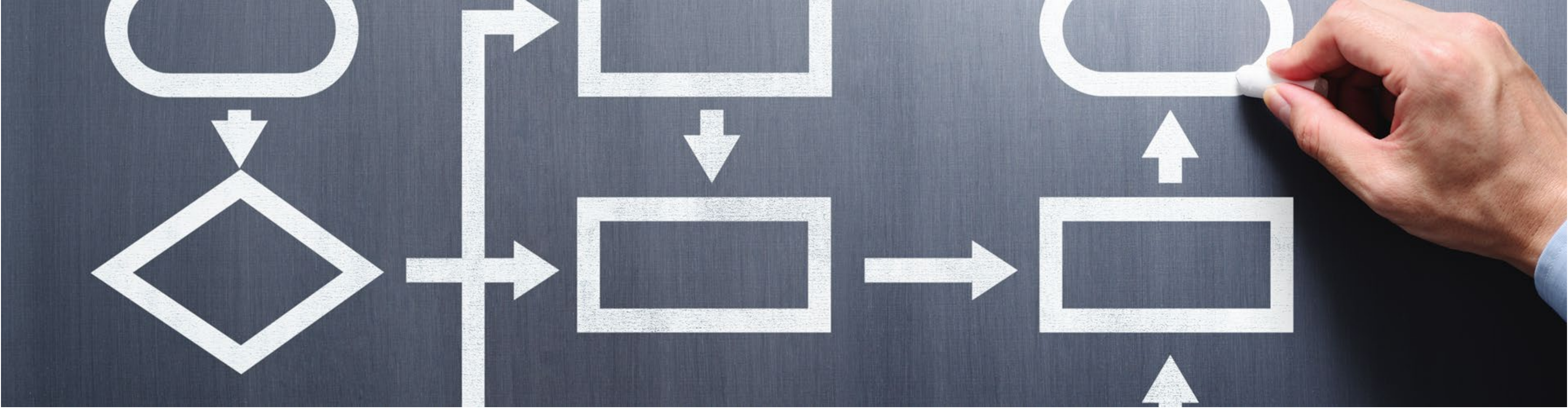
This document refers to the file named ***"WorkflowDevProcess.pdf"*** included on page 2. This document assumes that you have already gone through a *Discovery Process* with your team to identify and prioritize the workflows you will develop.

WORKFLOW DEVELOPMENT PROCESS					
DEFINING (Leadership) >		DEVELOPING (Team) >		IMPLEMENTING (Team) >	
1	**Name the workflow** (easy to identify)	6	**Establish logistics** (team meeting venue/format)	16	**Distribute workflow** (who, how)
2	**Write a brief description** (purpose)	7	**Debrief** (what's working/not working)	17	**Train as needed** (add to training manual)
3	**Set boundaries** (start & end points)	8	**Establish KPI's** (tracking & measuring for each)	18	**Deploy workflow** (ownership & review schedule)
4	**Classify workflow** (by department or type)	9	**Determine activities/tasks** (what, who, how long, documents*, resources**)	19	**Review workflow** (per set schedule)
5	**Select development team** (per criteria)	10	**Organize activities/tasks** (sequence, key decision points, what if? scenarios)	20	**Document changes** (go back to step 16)
		11	**Establish duration** (in between activities/tasks & entire workflow)		
		12	**Set review schedule** (when to reassess and how often)		
		13	**Review workflow**		
		14	**Document workflow** (diagram, document, etc.)		
		15	**Final review**		

* *Checklists, forms, other workflows*

** *Software, third party, etc.*

Version 1.0



What is a workflow?

A workflow is the sequence of industrial, administrative, or other processes through which a piece of work passes from initiation to completion.

Why should you develop a workflow?

Workflows can help streamline and automate repeatable business tasks, minimizing room for errors, and increasing overall efficiency—dramatically improving your business. Managers can make quicker, smarter decisions, and employees are empowered to collaborate in a more productive and agile way.

A workflow can provide the following benefits to your organization:

- Gain more Insight into Business Processes
- Identify redundancies
- Increase accountability and reduce micromanagement
- Improve Communication
- Provide better customer service
- Improve the quality of your products or services

How to develop a workflow?

There are three main steps to developing a workflow.

1. Defining the workflow
2. Developing the workflow
3. Implementing the workflow

1. Defining the workflow

The five steps to defining a workflow must be performed by leadership.

1. **Name the workflow**
   Think of your naming convention for workflows for easy identification. You may end up with a high number of workflows, so now is the time to think of a naming convention that is scalable. You may consider a workflow ID instead or in addition to the name.
   Example: "Department + Process + Task," or "WK-HR-05-20"
2. **Write a brief description**
   The description of the workflow should include its purpose or its goal. Think of new employees being able to understand clearly what the workflow is all about just from its description.
   Example: "The goal of the Sales Funnel workflow is to identify each step in our sales process that converts leads to clients so we can approach sales consistently and efficiently."
3. **Set boundaries**
   Boundaries are the start points and endpoints of each workflow. It is essential to identify them to eliminate overlap.
   Example: "The Leads Qualification workflow starts the moment we assign a lead to a sales representative, and it ends with a completed Initial Qualification checklist and the sales representative's decision on whether to continue or end the sales process."
4. **Classify workflow**
   Classifying workflows is extremely helpful for organizational purposes. As you develop more and more workflows over time, organizing them will make them easier to find and more likely to be used by your team. You can classify them by department or by function.
   Example: "Sales, HR, Operations" or "Governance, Strategy, Finance"
5. **Select the development team**
   Workflows are more successful when the team that uses them creates them. In some instances, that team will consist of too many people to be efficient or even viable. In those cases, you need to set up selection criteria. *For example, consider:*
   a. *Their experience with the tasks within the workflow*
   b. *How long they have been in the company*
   c. *Their communication and collaboration skills*
   d. *Their level of objectivity/ability to provide real feedback*
   e. *Their influence level on other employees*

2. Developing the workflow

The ten steps to developing a workflow must be performed by the selected team.

6. **Establish logistics**
   Now that you have selected the team, it is time to establish a communication strategy. How will this team meet? In-person, virtually, both? How often? For how long? Also, think of the following roles:
   a. *Who will be the leader?*
   b. *Who will take notes?*
   c. *Who will police progress?*
7. **Debrief**
   Start the discussion with a debrief on the existing process to get everyone on the same page. Answer the following questions (click to see a sample online debrief form):
   a. Which level of priority would you assign to this workflow?
   b. On a scale of 1-10, how would you rate the current process?
   (1 = not working at all; 10 = working very well)
   c. Can you elaborate on your rating above?
   d. What is working with the current process?
   e. What is not working with the current process?
   f. Can you share examples of when the current process has broken down?
   g. Can you share your suggestions for improvement?
8. **Establish KPI's**
   Start with the end goal in mind. You have already defined the purpose of the workflow. It is time now to convert that purpose into metrics. What will you use to measure the success of this workflow, and how will you track the data needed to do the measuring?
   Example of metrics: percentage of projects completed on time, customer satisfaction rating, close rate from lead to client, number of callbacks per week/month/quarter, etc.
9. **Determine activities/tasks**
   Here is where you start thinking about the activities/tasks that need to be completed within the workflow. For each activity/task, define the following:
   a. What is the task?
   b. Who is responsible, accountable, consulted, and informed?
   c. How long should this activity/task take?
   d. Does this activity/task require specific documentation? Consider checklists or forms.
      i. Sample online checklist
      ii. Sample printed checklist (see ***"SampleChecklistPrint.pdf"*** on page 7)

   iii. Sample PDF fillable checklist (open ***"SampleChecklistPDF.pdf"*** to see functionality)
   iv. [Sample online form]
   e. Does this activity/task require specific resources?
      i. Software requirements
      ii. Third-party outsourcing

10. **Organize activities/tasks**
    Now that you have a list of activities/tasks, we recommend using post-it notes to create an initial flow. Post-it notes make it easy to change and move things around while you are still brainstorming. Think about the sequence, key decision points, and "what if" scenarios. The goal is to get to a consensus for the flow.
11. **Establish duration**
    Agree on the duration of each activity/task and also on the period in between tasks. Setting both types of durations will give you a total length of time for the entire workflow. Consider using ***WorkflowStepsWorksheet.pdf*** on page 8.
12. **Set review schedule**
    Decide as a team when you will reassess the workflow and how often.
13. **Review workflow**
    Consider your post-it notes. Make sure you do not get stuck trying to make the workflow perfect. Developing workflows is an iterative process, and their effectiveness is depends on constant improvement.
14. **Document workflow**
    Once your post-it notes are ready, document the workflow.
    a. Sample document (see ***"WorkflowDevProcess.pdf"*** included on page 2)
    b. Sample diagram (see ***"SampleWorkflowDiagram.pdf"*** on page 9)
15. **Final review**
    Review the documented workflow and make any necessary edits.

CRITICAL WORKFLOWS LIST
List of critical workflows to be developed in order of priority.
Your Name: ______________________________
Date: ______________________________

WORKFLOW	DEFINED	DEVELOPED	IMPLEMENTED
Workflow design / implementation - set up structure with team meeting and buy in	☐	☐	☐
Workflow accountability - assign the person who is ultimately accountable for the workflows use	☐	☐	☐
Sage Inventory module	☐	☐	☐
Sage SSO Field Automation	☐	☐	☐
Sage Estimating tool	☐	☐	☐
Bid request process refinement / systemization / follow up	☐	☐	☐
Tools/equipment inventory / use case game plan	☐	☐	☐
PO issuance workflow / checklist	☐	☐	☐
Workorders consistent in qualification amounts / ask enough questions to establish it's in the wheelhouse for the right person assigned to it: with a checklist	☐	☐	☐
Product inspection process when received: damaged and cannot be used / incorrect finish / incorrect quantity / incorrect part	☐	☐	☐
Tags need more info / a clear cut designation of what needs to be completed	☐	☐	☐
Scheduling – Day to day, and Friday to Monday – access to the schedule remotely	☐	☐	☐

Comments: ______________________________

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WORKFLOW ACTIVITIES/TASKS WORKSHEET						
FOR WORKFLOW: NAME GOES HERE						
	STEP 1	STEP 2	STEP 3	STEP 4	STEP 5	STEP 6
WHAT						
Name						
Description						
Boundaries						
Department						
Type						
WHO						
Responsible						
Accountable						
Consulted						
Informed						
WHEN						
Duration						
TOOLS						
Documents						
Resources						

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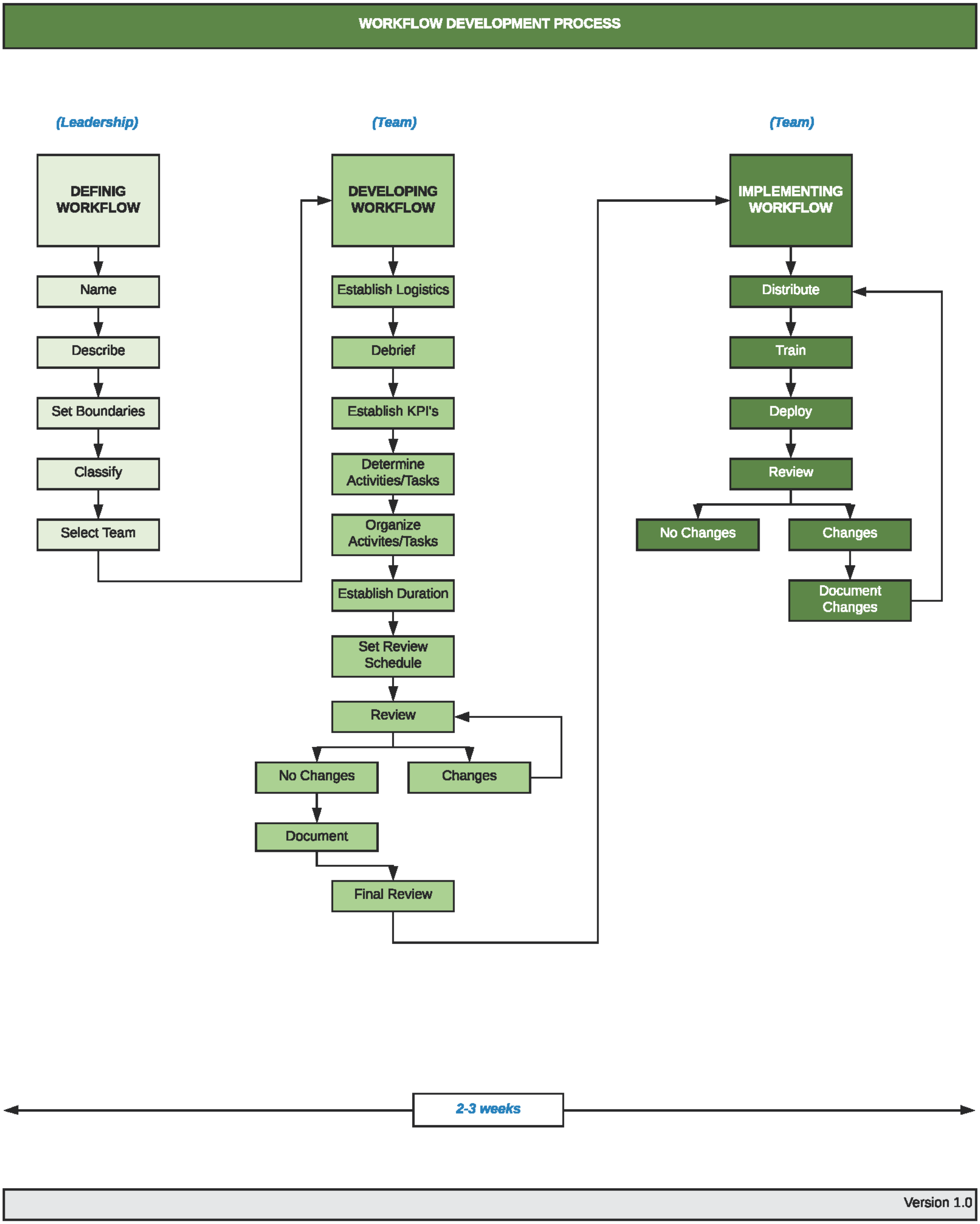
WORKFLOW DEVELOPMENT PROCESS
(Leadership)
(Team)
(Team)
DEFINIG WORKFLOW
Name
Describe
Set Boundaries
Classify
Select Team
DEVELOPING WORKFLOW
Establish Logistics
Debrief
Establish KPI's
Determine Activities/Tasks
Organize Activites/Tasks
Establish Duration
Set Review Schedule
Review
No Changes
Changes
Document
Final Review
IMPLEMENTING WORKFLOW
Distribute
Train
Deploy
Review
No Changes
Changes
Document Changes
2-3 weeks
Version 1.0

3. Implementing the workflow

The five steps to implementing a workflow must be performed by the selected team.

16. **Distribute workflow**
    Think about who needs to have this workflow and how you will distribute the first version and subsequent versions.
    Example: via email, shared folder, etc.
17. **Train as needed**
    Determine who needs training on the workflow and a training schedule for new employees and updated versions. Consider adding the workflow to the training manual.
18. **Deploy workflow**
    Start using the workflow! Assign ownership of its implementation and honor the review schedule you defined.
19. **Review workflow**
    Honor the review schedule you defined. Consider using ***"WorkflowEvaluation.pdf"*** on page 11 to keep track of document versions.
20. **Document changes**
    If your review resulted in changes to the workflow, make the changes, and go back to step #16.

WORKFLOW EVALUATION						
FOR WORKFLOW: NAME GOES HERE						
DESCRIPTION						
Department			File Name			
Type			File Location			
Responsible			Current Version			
Accountable			Last Updated			
Consulted			KPI 1 Description			
Informed			KPI 2 Description			
Duration			KPI 3 Description			
VERSIONS	**1.0**	**2.0**	**3.0**	**4.0**	**5.0**	**6.0**
Deployment Date						
Evaluation Date						
KPI 1 Score/Metric						
KPI 2 Score/Metric						
KPI 3 Score/Metric						
What's Working?						
What's Not Working?						
Changes for Next Version						
Revised Document Date						

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