



Most people who have tried to create workflows (or Processes) for the first time find that it can be more difficult than they anticipated. Following these steps listed below will make it easier.

## 1 Identify a workflow or workflows that you want to capture

The time and effort to capture all the processes and procedures that make up most organisations is far too much.

It is much better to identify some important process as a place to start. Aim to look at one simple workflow that is well understood.



## 2 Gather the stakeholders of the workflow together



Workflows are designed to capture what happens in an organisation. This can't be done by managers behind closed doors: it

has to involve the staff who do the work.

Gather that workflow team together to discuss and capture the workflow.

## 3 Define a beginning and an end for the workflow

A workflow should have a beginning and an end. Sometimes it is when the work is handed over to another person or department, or when that work is closed off.



Don't be afraid to divide a larger workflow into smaller parts. These smaller parts are easier to work with.

## 4 Identify steps in the workflow.



It is good to get the team to write down the steps on post-it notes or pieces of paper.

Don't worry about order of the steps.

Also you might have more steps than you need or need to split a step up. We can worry about that later, just try and get as much information as you can down.

### 5 Identify critical decisions

Identify critical decisions.

You have probably already discovered them already when thinking about steps.

Remember you only want the decisions that affect the main way the workflow operates. Don't, try to discuss every decision.



### 6 Organise and order the workflow.

Put all your steps in order paying attention to the following things.

1. The critical path that steps are in.
2. The optimal order.
3. Missing steps
4. Steps that don't belong in the workflow.



### 7 Review your workflow

Some things to look for during a review is

1. Missing out important steps.
2. Having too much details or steps that don't matter.
3. Make sure what you have captured is what actually happens, not just what is supposed to happen.



### 8 Organise your resources

Drawing a diagram is only the start. It is the basis on which you can organise and improve.

For the documenter it is about getting the documents related to a workflow and each workflow step together and including them with the workflow diagram. For the actual workplace it is about organising people and resources around the work practice captured in the workflow.



### 9 Improve and optimise

Most people start the process of developing workflow diagrams so they can improve their business. It is better to wait until this step before trying to do this.

When trying to improve the process look for certain areas such as

1. Order issues
2. Resource issues
3. Coordination issues
4. Costing issues



### 10 Put into the computer and online

Now to put all this information into the computer. Tools such as Visio and SmartDraw can only capture the diagram.

We recommend using tools such as **Workflow Designer** which can be used to create workflow diagrams, add in details for the workflow and steps and link documents to steps.

Then publish this information online in the cloud with **Workflow Connect** to share it.

Consider moving beyond just diagrams with Workflow Connect's **Business Modules** and **Workflow Automation**.

