

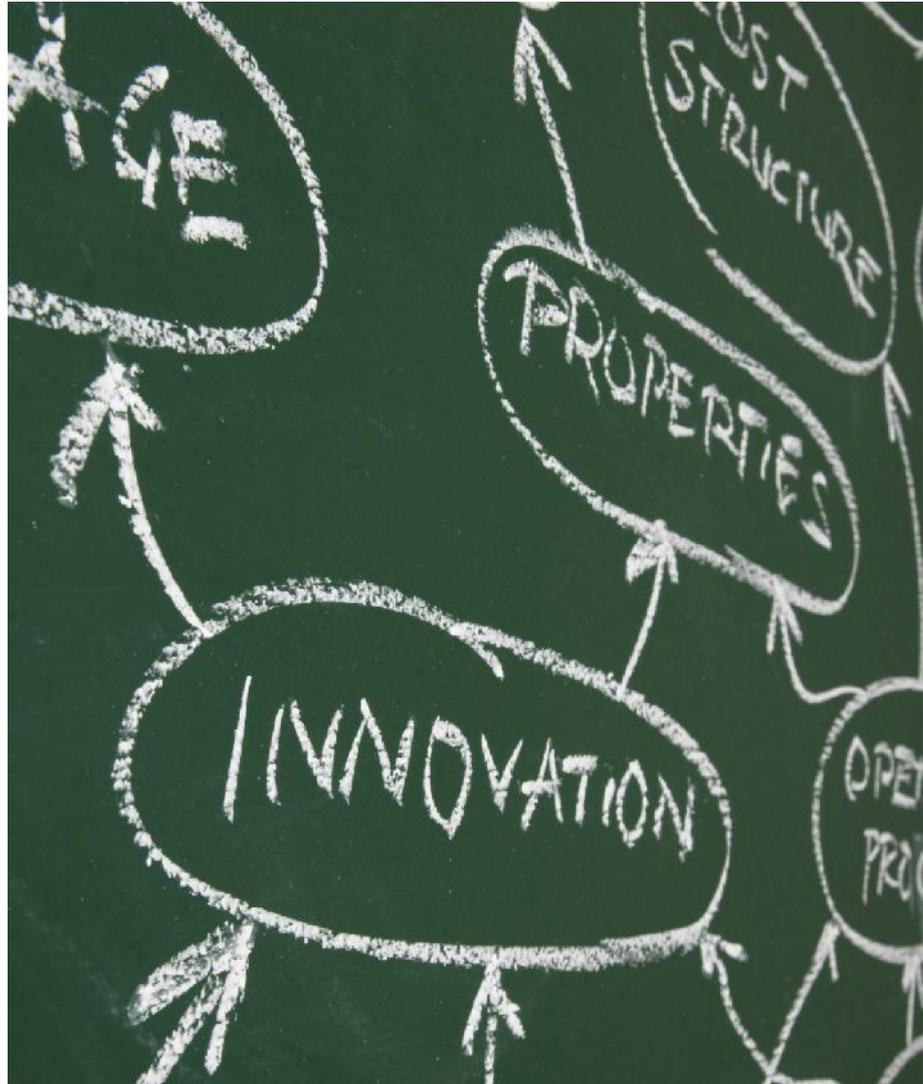
What are Workflows

Prior Learning

This lesson requires no previous learning.

Learning Outcomes

1. Understand what a workflow is.
2. Be able to create a workflow.
3. Be able to optimize a workflow.



Introduction

They have been around for some time and go by a variety of different names, such as business processes, process maps, work instruction, flow chart or more often now **workflows**.

Whatever name we choose to use, it is how we tend to think in our work. We have mental pictures of how everything fits together to allow us to complete our work as a team and produce a product or provide a service.

In this lesson we will look at creating, using and optimizing workflow diagrams.

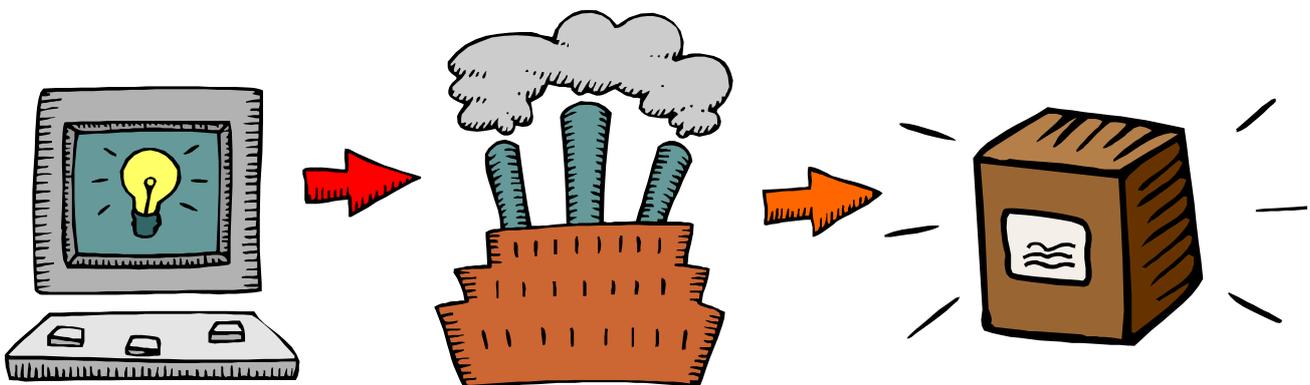
Introduction to Workflows

If you have heard about workflows but have never delved deeply into creating and using them you may have a number of questions which we will try and answer here. If you are already familiar with workflows and want to learn how to use Workflow Designer to visually capture your processes then go to the [Workflow Designer Tutorial](#).

Probably the first two questions are going to be;

1. Why use workflows?
2. How to create them properly?

These two questions are interrelated because we use workflows to do a large number of things.

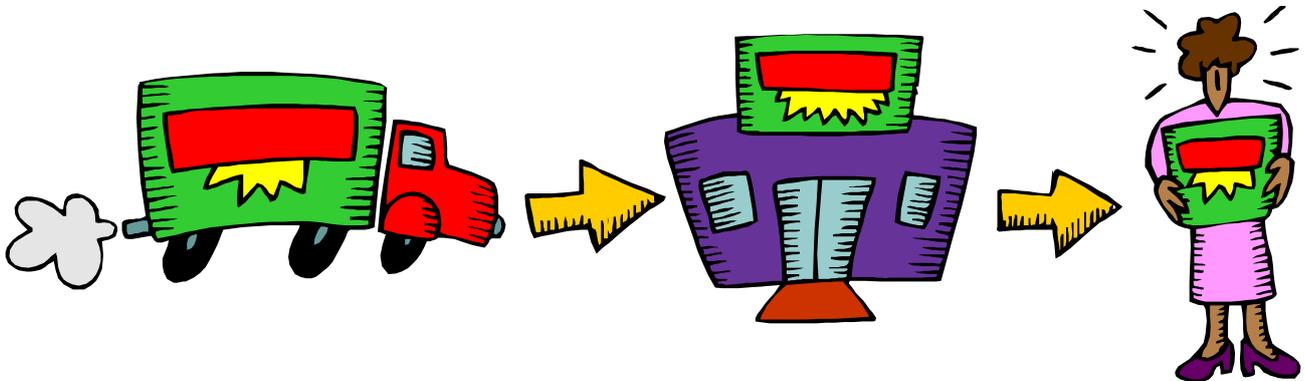


Why use workflows

- Create a **visual overview** of what is happening in the organisation so that you can see your entire business at a glance.
- It also helps us to **optimise** our processes and hence **improve** our business. This is not a magical special property of workflows, but this comes from using a system to understand our business or organisation. Workflows however are easy to create and understand.
- There are a number of **business management** issues where the use of Workflows is extremely helpful. Workflows aren't just a pretty picture but it also helps us assign things such as responsibility and keep track of documentation within business processes.
- Your business experience and **knowledge is captured** in a single place. When staff move on or are promoted the information needed for that position is retained.
- Visually representing information allows us to **communicate** easily and clearly about the work processes in an organisation. They can be easily used for new staff inductions, communication with managers, consultants and auditors.
- Creating workflows is usually the first step in **automating** work processes.

What is a workflow

Now before we do anything further we should define what a workflow is. It is basically a picture of a sequence of operations: a business process. These operations could be carried by a person, a group or even automated in some cases.



You may know Workflows under different names including

- Chart
- Workflow
- Procedure
- Process
- Workflow Instruction
- Flow Chart

Most people in business or management today think in terms of business processes. If you are familiar with Business Process Management (BPM) or Business Process Re-engineering(BPR) you will also recognise that Workflows form the basis of these management systems.

Workflows show how a task progresses through your organisation. It could be in an operational or a project environment. It could a manufacturing task where you can see how physical components move through your factory or a knowledge based task and we are looking at who needs to communicate and cooperate to finish the task.

No matter the industry, situation or task you can use a workflow to clarify what works and what doesn't in the process, analyse problems and identify areas for improvement. You can also document your solutions to those problems, explaining the steps in your processes in as much or little detail as you need.

Creating a workflow

Now we come to the problem of creating a workflow. Creating workflows are pretty easy, however we don't want to just create a workflow, we want to create it properly. After all, any workflow that doesn't reflect the reality of your business or organisation isn't just a waste of time, it can actually hurt your business. If at the end of this tutorial you feel you need help in creating workflows for your business get in [contact with us](#) here at Workflow Connect or one of our consulting partners.

There are few simple rules and processes to follow when creating a workflow that you can use.

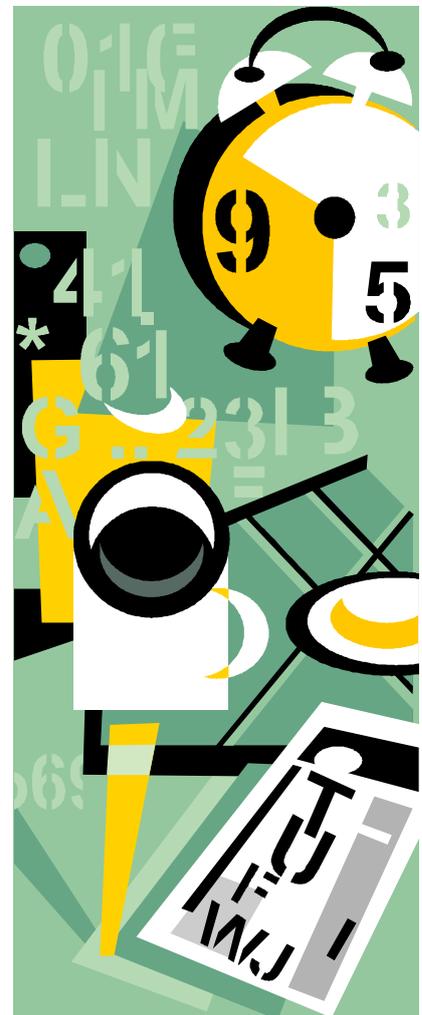
The number one first ground rule or creating a workflow is to realise what our purpose is here. We are trying to capture what currently happens. Yes, we should try and improve and optimise it, but before we do that we must get a record of what is happening now. I emphasis this because far too often managers are so motivated to improve what is happening they document all the improvements. The result is usually a useless document which doesn't work. So let's write down what we have now and then later we will aim to improve the workflow.

Getting ready for work: A Workflow Example

Whether you are the CEO of a large corporation or flip burgers at McDonald's then is one work related task we all have to do, and that is, get out of bed and go to work.

We have chosen this example for several reasons.

1. Nearly everyone does this task.
2. Everyone does this task in different ways; you should create your workflow for your personal morning routine. This fits with our approach at FlowBiz and Workflow Connect; that workflows and software should adapt to meet your needs, rather than force you to adapt to the software.
3. There are critical things we must do to make this task successful (Neither a CEO or a burger flipper should arrive at work sans pants).
4. There is a critical path that things should be done in (even though your mother told you to put your shoes and socks on, hopefully you learnt that is not the correct order)
5. There is also flexibility (please don't try and tell me you have never slept in and raced out the door, eating breakfast as you go).
6. There is room for improvement and change (or maybe it is just me who keeps thinking that I should get up 30 minutes earlier and exercise).
7. There is interaction outside of the Workflow (surely you have delayed at least once by a member of your household using the bathroom for too long in the morning)



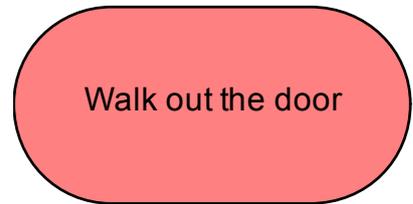
Step 1: beginning and end



The first thing we need to do is to identify the beginning and end of the process that we are trying to capture. For our example it might be from when you get out of bed to when you walk out the door on your way to work.



It is quite easy to spot that there might be some ambiguity even in this. For example, the starting point could be from when your alarm goes off, when you wake up or when you get out of bed. Other people might find walking out the door might not be the last step of their morning routine if they have breakfast outside.



It is your workflow for your life, so you have to define it for your life.

Here is the first rule. We are not trying to capture every possible nuance and possibility in a workflow, rather we are trying to describe a typical and smooth flowing process. Emergencies and mistakes may crop up that disrupt the normal work or process.

For example, what if you walk out the door, forget your keys, have to call the locksmith to unlock the door, wait for them to arrive, then get your keys and get in the car only to realise you forgot your brief case and have run back to get it. Sometimes we spill coffee on our shirts and need to change them, other times we are late and skip breakfast, occasionally we need to bring some work from home into the office and so on.

None of these are typical workflows. They are exceptions that need to be handled.

On the other hand you don't want to idealise the process. For example, if you are the type of person who sleeps through their alarm most mornings then it should be in the workflow diagram

Step 2: Identify steps



Most people have a morning routine. They get out of bed at the same time every morning, they exercise, shower, eat breakfast, read the morning paper and so on, before they calmly leave for work. These people's routines are going to be easy to capture.

Then some people vary their morning schedule every morning for various reasons. Maybe it is because they have different tasks on different mornings, such as doing the washing, their work schedule is different on different days, or they just over sleep.

Your first step is to write down all the processes that make your morning routine. We don't have to worry about order at this stage, just list all the processes. Brainstorm it, it is better to have more processes than too few.

Shower

get dressed

Eat Breakfast

Shave

One of the greatest tools you can use to analyse your workflow steps is the humble post-it note. Get together with the people who know about the work and start writing down the steps on post-it notes.

You could use ordinary pieces of paper but post-it notes are small so people won't be tempted try and put all the details into a single note.

Also they are sticky on the back, and this is going to help us in step 4 and later when we start to organise and reorganise our workflow.

But the main reason to use them is that this shouldn't be a task conducted by a manager locked in their office, but by a team gathered around a table.

Step 3: Identify critical decisions



Every morning we have decisions to make. Do you want to eat rice bubbles or corn flakes, should you wear your blue or red tie and so on. The issue here is which decisions should become part of the workflow.

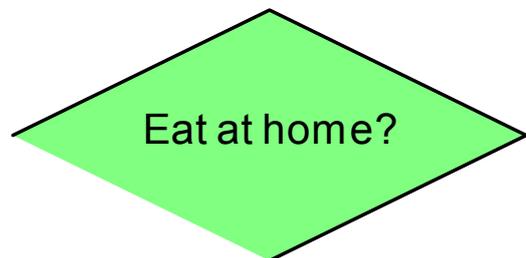
A critical decision is one that changes the workflow.

Getting dressed in the morning may involved many decisions but we can make two assumptions here, firstly that you know how to get dressed and that you will always get dressed. So this is simply covered by a single process label, “Get dressed”. What we choose to wear will not change the workflow. **Note:** we could create a sub workflow for getting dressed if we want more details for that step.

There are also many variables in our morning routine. Maybe we will take the rubbish out on our way out of the door or send a quick email to a friend or client. But these are not decisions that are part of the normal flow that we are capturing. They might be done in a way that they are mixed in with the other steps in our process but they are not part of achieving the task, so any decisions to do these things shouldn't be part of the workflow.

What should be part of the workflow are decisions that directly affect the task we are undertaking. One simple example is whether we need to take an umbrella or not. How often have you left home only to realise that it is raining or you see threatening clouds and have to return home for an umbrella.

Another one would be whether we eat at home or eat out, after all that morning espresso and muffin special is really tempting.



A critical decision is one that affects whether a task can be said to be successfully completed or not. Choices of coffee or tea don't affect the end result of the task. Including that sort of information unnecessarily complicates a task.

Remember that creating a workflow is a process of discovery. It is usually better to write down everything first and then work out which parts are important or not.

Also we don't need decisions to control the order of tasks. Realise that the many processes in a workflow may not have to be completed in a particular order. If we showered the night before, then we don't need to shower in the morning, as that task has already been completed and can be ticked off. We don't really need a decision as part of the workflow.

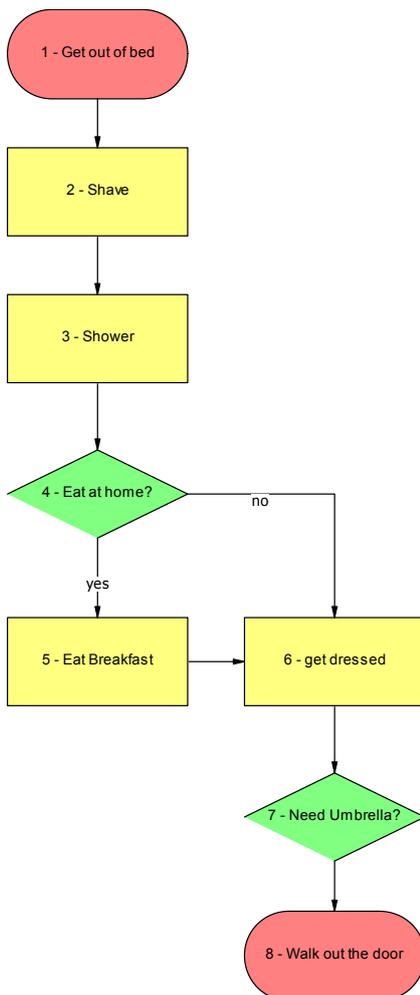
Step 4: Organise and Order the Workflow

Does it really matter what order you do things in? Obviously it is important to get dressed after you have a shower but it doesn't matter whether you have your breakfast before or after either of those tasks.

A workflow then is two things

1. The critical path which needs to be followed for the work to be successfully completed (socks before shoes).
2. An optimal or suggested order of doing things.

Generally we should document the typical order that we normally do things, paying careful attention to



- Items that represent a critical path, such as eating breakfast after making it.

- Items that are required. There are two common mistakes here
 - A critical step is left out. It is amazing how often important steps are left out of an analysis. For example did I remember to collect your keys on the way out the door in my workflow?

- Too much information is included. If a step is to have a cup of coffee, do we really need to say, make a cup of coffee. Wait until it is cool enough to drink. Drink the coffee. Wash your cup. We can assume that the person will understand enough to do that. While making a cup of coffee can be complicated, we can always document that as a separate workflow.

You will notice in our workflow we have a number of problems (which will fix in the next step).

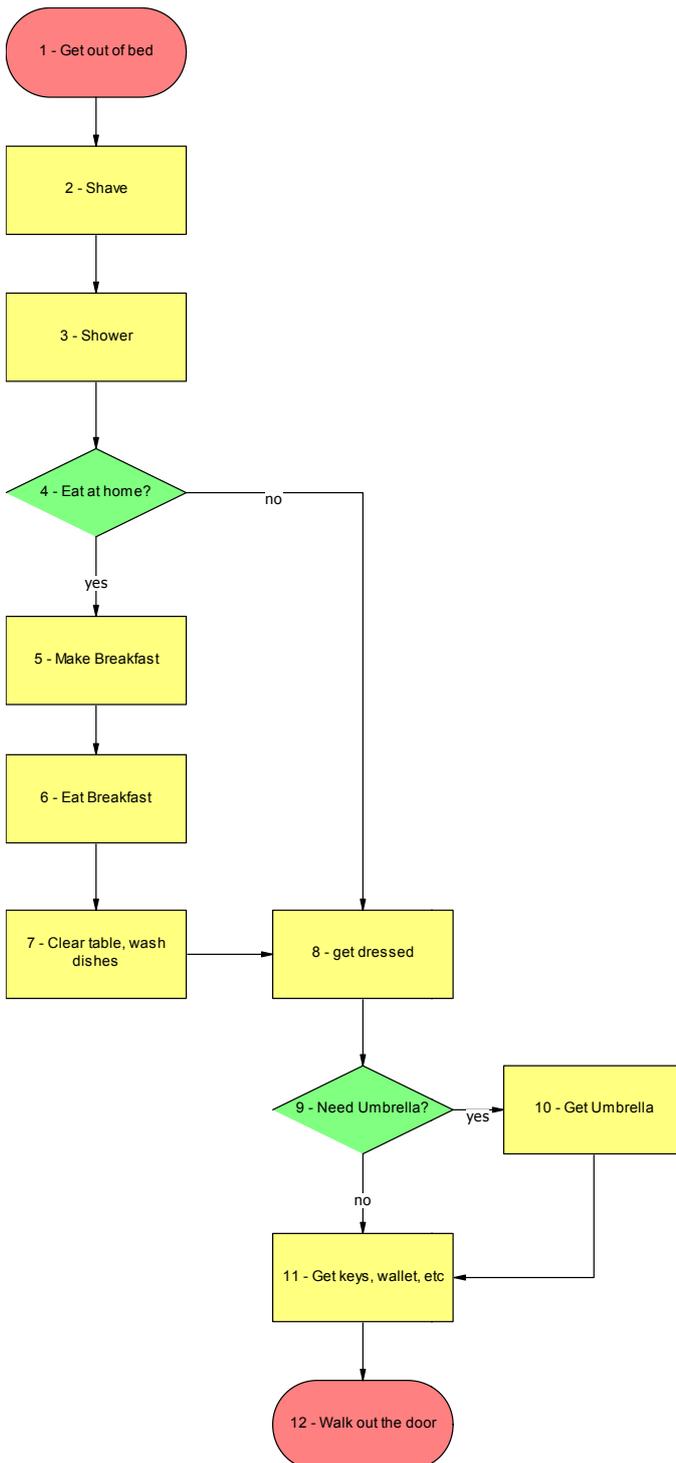
- We eat breakfast, but we don't make it or clear the dishes away. That may be fine if our wife/husband/mother does this for us.
- We have a decision about an umbrella, but no actions related to it.
- We have forgotten our wallet, keys, phone.

Remember those post-it notes I asked you to use. Now is when they become extremely useful. I prefer to use a white board because we can draw lines between the notes on the white board. Other people use large sheets of paper on a flip chart or just laid out on the table.

Step 5: Review

K.I.S.S. stands for Keep It Simple Stupid. Some people say it stands for Keep It Short and Simple, but I like to keep the word stupid in there. Firstly simple doesn't mean it has to be short, and also because this is the stage where I want to go back and review if I have done anything stupid (which happens more often than I plan to admit).

This is pretty easy because I am so good at doing stupid things I have become an expert at finding them.



1. A common mistake is to leave out a critical stage. Often when we are describing the things that we do every day there will be something critical that we might forget. Did we forget to kiss our wife/husband before we left for work (guys who do this are dead), forgot to clean up after eating or some other seemingly minor action.

2. Another problem is that we may have included more detail than we need. Actually this is not stupid, it is better to start with more information and remove or merge steps.

3. The third area of is in our own practices. Now that we have our workflow it will be easier to identify areas of inefficiency and places for improvement. But let's leave that to the optimise stage.

Step 6: Organise your resources



Why did we create a workflow? Most people or businesses use workflows to make their business more efficient and effective. In the next stage we can do this by improving the workflow, but we can also do this by using the workflow to organise the resources.

How often in your business are people running around looking for documents or resources that they need to do their job. In many companies, whenever there is an audit or review, staff waste a whole week preparing everything. On a personal level how often are you late for work because you couldn't find your car keys or you realised that you didn't have an ironed shirt.

Here are some examples of how people make each step more efficient buy organising resources

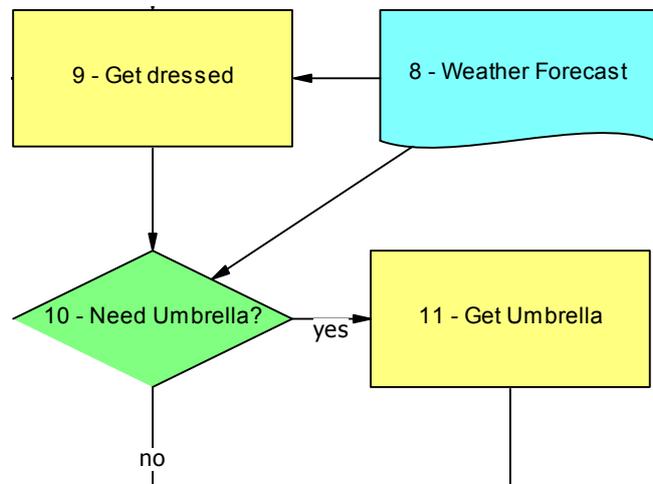
- Albert Einstein famously had 5 identical suits so he wouldn't have to waste time deciding what to wear in the morning.
- Most people eat the same thing for breakfast every morning to save time.
- When I find myself going to client sites first thing in the morning, I began packing my bag the night before, so I could just grab my bag and head out the door.
- As for the car keys issue, most people solve this by having a place for their car keys.

Having the right resources are important.

We need physical resources such as food for breakfast and our car keys in the right place.

But we also need information resources. For 2 steps, "Get dressed" and the decision step "Need Umbrella" we need information, basically a weather forecast. While working out the weather can involve looking out the window it is also useful to check the forecast on TV, the radio, on the Internet or our phone.

We include this as a Document step in our workflow diagram.

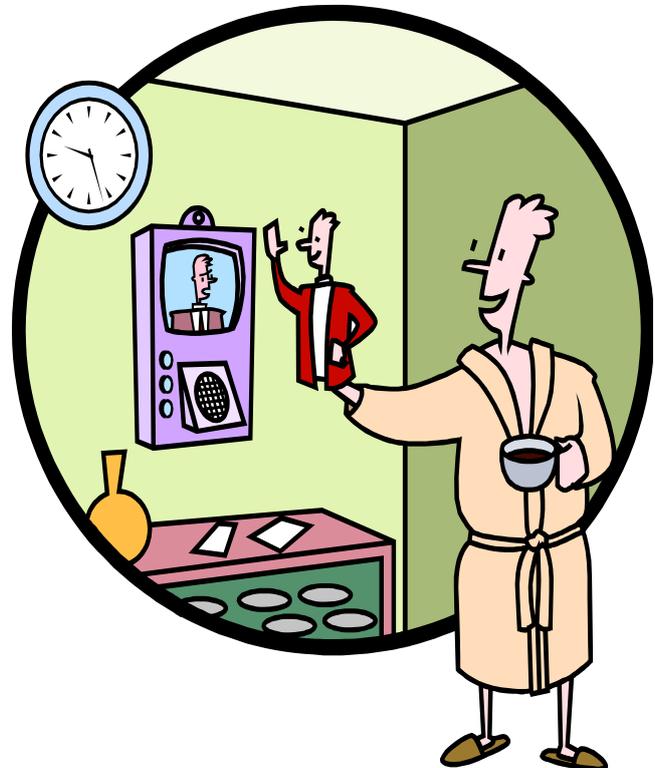


Step 7: Improve and optimise

Now that we have a workflow that describes our day and we feel that it is a true representation of what we do we can now try and improve the workflow and then improve our mornings.

There is no single way to improve and optimise a workflow. Here are some things to look for.

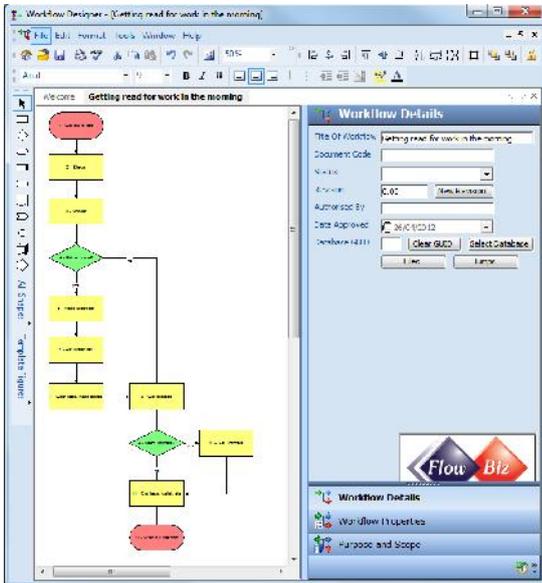
1. **Order issues:** This is time-space analysis. Most parents suffer from poor time-space use because their life has become full of children related tasks that are constantly changing.
2. **Resource issues:** If you are constantly delayed because there are two people who want to use the bathroom at the same time in your household, then changing the time you shower could be critical, even changing showering the night before removing it from the morning workflow.
3. **Coordination issues:** I know families that always have breakfast together in the morning. This can only be achieved by making sure that each family member has an interlinked workflow.
4. **Costing:** Would it be better to get up 10 minutes earlier and make your lunch or sleep in and buy lunch? I am not a morning person, so I would rather buy lunch.



Human issues: I put this as a separate box because it is one of the biggest mistakes in workflows. Workflows can dehumanise a process. Sure, I can be out of my house in 10 minutes if I rush, 20 minutes if I plan well, 30 minutes under ordinary circumstances. But on a warm summer's morning, I can cook and share breakfast with my family on the balcony, taking our time. Yes it takes longer but I arrive at work in a much better mood.

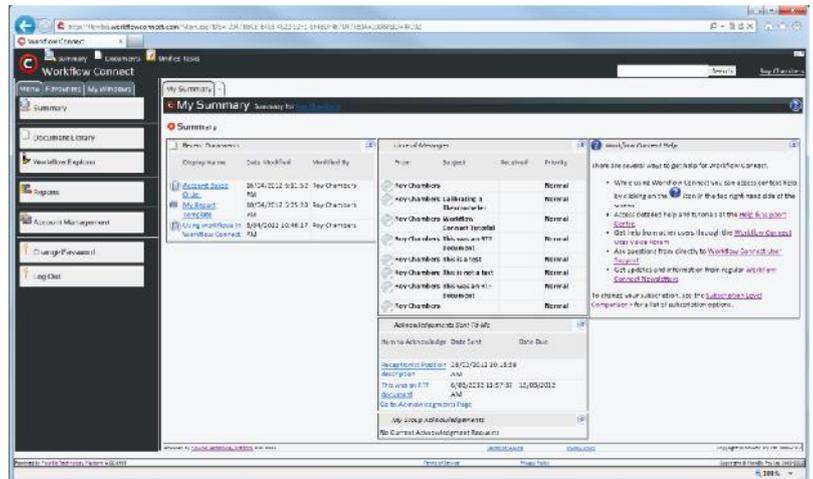
Step 8: Put it into the computer and online

Workflow Connect and FlowBiz provide a number of tools to analyse your workflow, organise your resources and even extend it to include additional tools and automation.



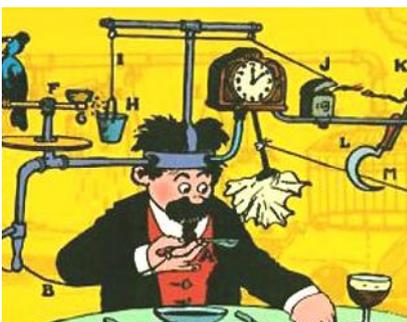
Workflow Designer is an easy to use free desktop tool that you can download and use to draw your workflow diagrams. It goes beyond programs such as Visio and SmartDraw because you can link in documents and include additional information about the workflow and each step. In addition you can link and publish your workflows to the cloud with **Workflow Connect**.

Workflow Connect is a fully featured document management cloud tool where you can organise your documents in folders or by linking them to workflows. It is also the basis of richly featured and extendable management systems.



Workflow Connect Business Modules add additional features to your system. Each module has the ability to be linked back to a workflow, integrating your business management tasks to your business processes.

Workflow Connect Automation – a feature available within the extended Workflow Connect system – turns your workflows into a controlled business process.



Automating your morning: This has been a comedy film staple since the earliest days of cinema. An alarm clock doesn't just wake up our protagonist but sets off a chain of actions that do everything from throw them out of bed, get them dressed and make them breakfast and coffee.

There are lots of things that benefit greatly from automation, but the first step is always to design the workflow.