Key Elements of Workflow

People

Process

Technology

There are 3 key elements that are all pre-requisites for achieving workflow success: People, Workflow Process, and the Technology. So, if you have found yourself in a situation where you don't have defined processes, accountabilities are uncertain and deadlines are sometimes missed, then perhaps you have a workflow problem. Getting all 3 aligned is absolutely essential to ensuring your workflow, works.

As you look to improve your workflow here are some factors to consider………………

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Key Elements of Workflow

People

What are the key issues?
Who owns the process?
Who is involved?
What are their roles?
Are they committed to improving
it and working together?

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Key Elements of Workflow

Process

Workflow has steps for a process that specifies what tasks need to be done and in what order.

To develop workflows, starting at high level and identifying the key big steps is important to see the process from end to end.

Then moving into more detail to capture the various layers involved and various exceptions is a good model to follow.
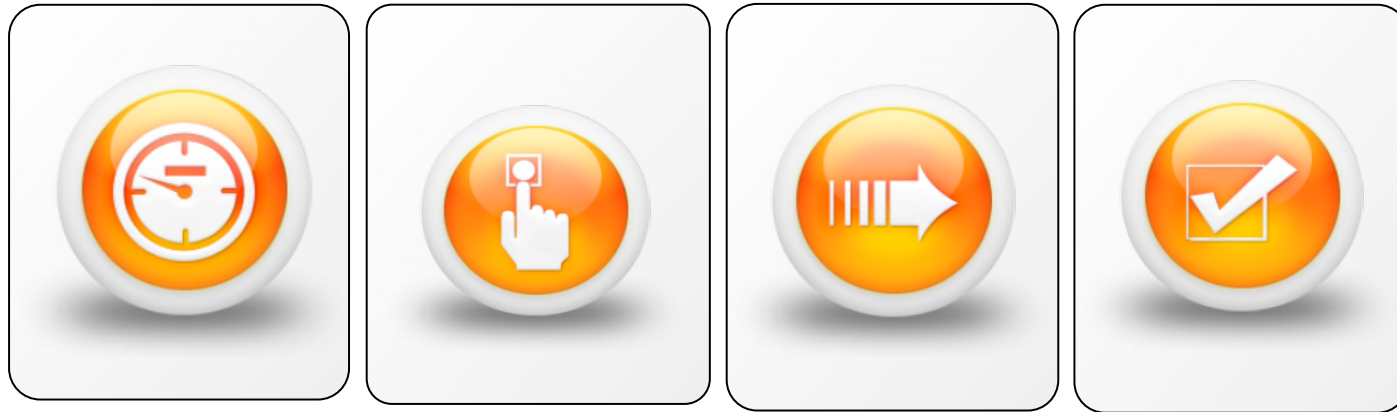
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Key Elements of Workflow

Technology

Now that people are aligned and your workflow processes are developed and clarified, <u>technology</u> can be applied to ensure consistencies and make it easier to follow the workflow than not do so.

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Why Should You Use Workflow?

Why Workflow? Workflow is a critical component of any litigation for a variety of reasons. So why should you use workflow and what are the key benefits? The primary advantage of utilizing workflow is improved efficiency which results in the automation of processes that eliminates many unnecessary steps and creates repeatable, structured consistent projects and processes…..and it also……

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Why Should You Use Workflow?

Workflow Saves You Time

A set of predefined workflows helps to create your project action plan very quickly. So developing a library of pre-formatted workflows that include tasks, description outlines, specific notes you want to track, time estimations, etc., can help you avoid having to spend time formatting a workflow on-the-fly and purely focus on starting and managing the project.

Why Should You Use Workflow?

Workflow is Easier & With Less Stress

Workflows make the task of creating a new project fast and easy.

You don't have to stress about what needs to go in your action plan or how to format it.

The workflows you build will tell you and your team what information needs to be tracked, the order of the tasks and a description of the project steps.

Why Should You Use Workflow?

Workflow - Direction & Guidance

Workflows step you through the actions needed to complete your project from start to finish. They tell each team member involved in the project what they have to do, how, and when. And since many projects are not exactly the same, you need to build or subtract from any of your workflows, on-the-fly. Workflows give you direction, so it's crystal clear what has to be done to complete your project and help gain a higher level of guidance and confidence in your knowledge work.
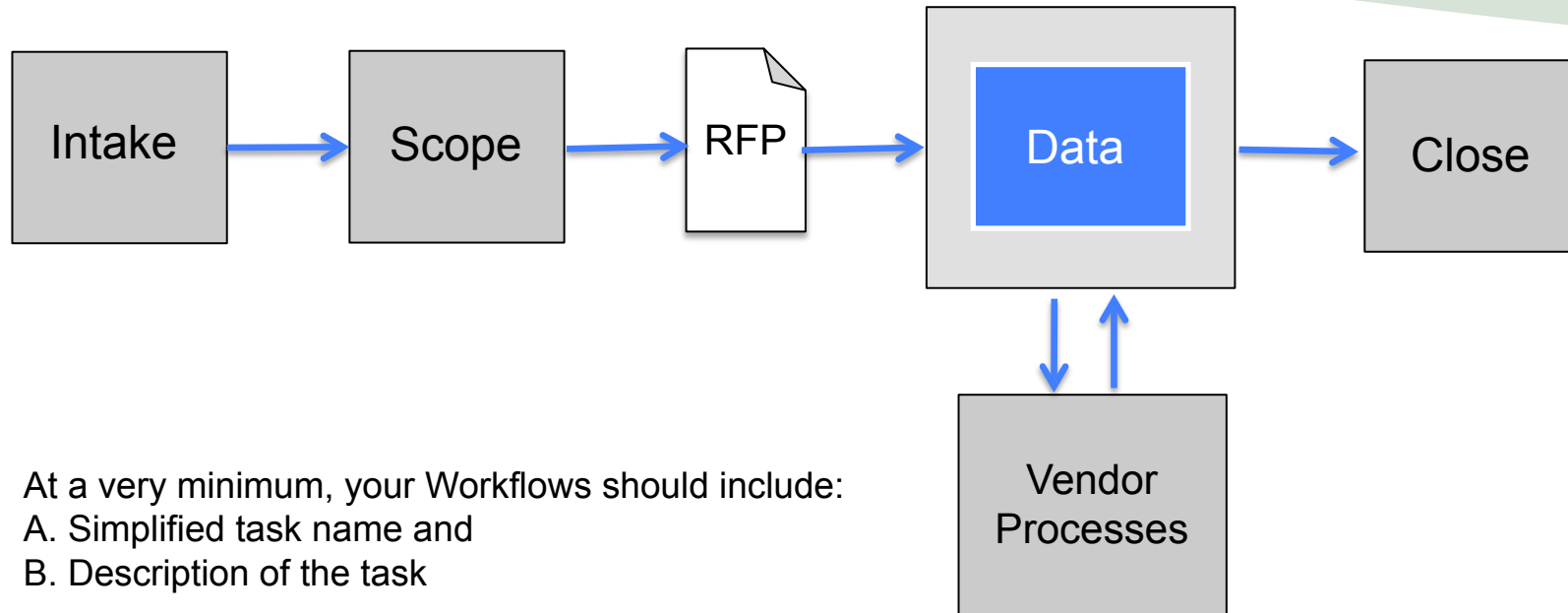
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Why Should You Use Workflow?
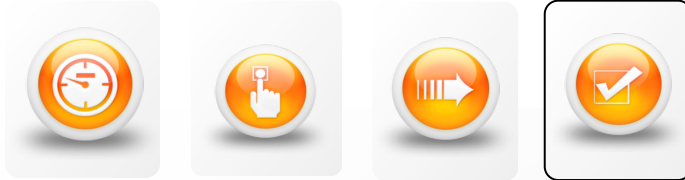
Workflow Boosts Consistency

It makes sense that if you implement consistent and quality project guidelines and workflows, then you will generate consistent and quality projects.

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What Elements Could Workflow Include?

Intake → Scope → RFP → Data → Close

Data ⇅ Vendor Processes

At a very minimum, your Workflows should include:
A. Simplified task name and
B. Description of the task

To name a few, here are other items it could also include, Notes, Estimated Time to complete the task, Actual Time Spent, Assigned To what person, Status of the Task, Links to other documents, Start Date, and Deadline.

So when you set out to define the steps of your workflows, these items I just mentioned are some of the most common items firms share with iFramework as to what they need to track and manage. It's also important to point out that your standard workflow processes in the tool you use to manage your workflow, need to have the flexibility and capability to customize to the exact way you want to work.

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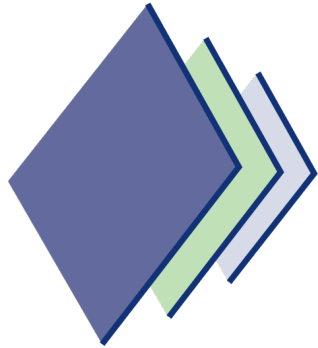
Contact Us

iFramework

Main Contact: John Rowley, Director

610.287.1139

info@i-framework.com

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