

Tips, Insights & Tactics

How to Design an Ideal Workflow

The more you can streamline a workflow, the more you can boost productivity for yourself and your business. A workflow is simply a process, but inherent in the word “workflow” is the concept of a work process that flows efficiently from beginning to end.



Start With a Chart

When you want to simplify an existing workflow it's helpful to sketch out a flowchart that illustrates all of the key tasks and activities it requires. The process of mapping everything out helps you account for each step, uncover any gaps, highlight dependencies, identify opportunities to simplify unnecessary or redundant tasks, and flag areas where improvements are needed.

Often a workflow crosses departmental boundaries. Add “swimlanes” to your flowchart to indicate which tasks in the process are handled by different personnel, departments, or even suppliers who are integral to the overall workflow.

Teamwork

When thinking about a process, particularly one that crosses departmental lines, it's a good idea to share priorities and accountabilities. A particular step in the process may not hold equal priority for everyone involved, but when stakeholders clearly understand each other's perspectives, a better compromise is more likely.

Information Flow

Workflow activities vary by business and department, but information plays a role in nearly every workflow. When information is clear, consistent and easily accessible by every contributor to the workflow, the process works more efficiently and effectively. When designing a workflow, include a central communication point. An Enterprise Content Management (ECM) system or file server, to host digital documents and files, provides a useful solution.

Tips, Insights & Tactics

How to Design an Ideal Workflow

Manage Change

Existing workflows can be impacted by changes in policies, ancillary processes, the introduction of new technology, etc. Whenever a disruption occurs, revisit an existing workflow with its key stakeholders, to re-evaluate its efficacy in light of the external changes.

Go Paperless

Handwritten forms and documentation are workflow bottlenecks. Digital information can be used, accessed and distributed far more efficiently than paper. Even at a personal level, such as a cloud-based calendar to capture work and personal appointments, digital solutions provide many advantages over paper. Maximize the use of the technology you already have to convert and migrate paper-based communications to digital.

Repeat Performance

It takes extra time to adjust our minds as we prepare to do a new task. When you have several identical or similar tasks, you'll save time if you do them in succession rather than switching back and forth between dissimilar ones. Think of it in terms of assembly-line efficiency. Look for opportunities to "batch" the individual steps of a task or workflow to accomplish more in less time.

Single-Tasking

Multitasking is doing two or more tasks at the same time. Technology is built for it, human beings aren't. Yes, many of us can chew gum and walk at the same time, but success rates drop quickly as concentration demands rise. People who seem to be multitasking are actually switching their attention rapidly between two different tasks. Both suffer in the process, sometimes with serious consequences. Instead, focus on one thing at a time. You'll accomplish more and your outcomes will be superior.

Workarounds

Routine workflows are designed for standard operating conditions and work well when each step is completed in a timely manner. Workarounds emerge for a variety of reasons, but in particular during emergency or rush situations. An urgent response to an urgent request may improve delivery over the standard procedure, but it also likely creates its own inefficiencies through miscommunication, rework, and clean-up after the fact. Understanding workarounds for existing workflows helps identify bottlenecks and can ultimately improve the efficiencies of the original process.



Automate Routine Processes

Today's Xerox® Multifunction Printers do far more than simply print, copy, scan, fax and email. Xerox® ConnectKey® technology is the powerful, new operating system for Xerox® Multifunction Printers. Already an award-winner, it expands the value of a printing device into a digital communication hub; streamlining workflows; routing and distributing digital documents automatically to pre-defined locations; connecting to mobile and cloud services; and advancing information security. Leverage its built-in document workflows, expand its capabilities with a growing collection of apps, or easily create custom workflows for your business needs.

www.xerox.com/connectkey

Visit us on the web or ask your local Xerox provider about our comprehensive line of printers and multifunction printers. xerox.com/office

Related Tips:

- 10 Tips for more effective time management
- 10 Ways to remake your workspace

xerox.com/tips

Related Templates:

- Flowchart Templates (includes a Key to Flowchart Shapes)

xerox.com/templates

Click an icon below to automatically share this tip sheet with your social media networks:

