

Workflow tips

That Work

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Rethinking your workflow

What's the worst?

When you call somewhere you get a different answer each time?

Or at work your CRM being a mess?

Trying to figure out what is the correct process or answer?

YES!!!

What can you do to get a grip on this in your business?

How can you alleviate this problem?

What would happen if you actually simplified, documented and automated?

WHAT would happen?...

Your life would be a lot easier, you would have consistency and your people would be able to meet the expectations that you've given.

Here are some simple steps you can take to clear up the clutter in your work processes and empower your staff to accomplish more.

Reverse engineering your workflow can create the results you want.

Rethinking your workflow

Start with....

- **What is the end result?**

- Use an image or clear description so we know how the end result should look.
- Use a video to clearly demonstrate the end result.

- **Why? Why is the end result important?**

- Why is it important that person learning or doing the task knows the process to complete
- What is the **negative effect** of it not being completed?
- What is the positive effect of it being completed properly?

- **When?**

- What are the trigger points for the person to follow the process?
 - Is it a calendar trigger? (specific day/time?)
 - Is it activity/ action oriented? (do this when that?)
- Deadlines?
 - If this then that needs to happen in 24 hours?
 - needs to happen each quarter?

- **Who does the task?**

- Title of the person assigned should invoke a feeling of being empowered to complete the task
 - "Bob, the guy who does this task"
 - Project Director in charge of "this task"

- **Last is how!**

- Use **Asana** or another workflow process manager to manage these tasks
- Using a cloud based or internet based system allows you to work with individuals anywhere
- Using a **cloud based** or internet system allows everyone to easily know where they are in project or task completion.



Rethinking your workflow can create easier task managment.

Using these simple tips to rethink your workflow, re-engineering it from the back end will create the simple steps you need to get the results you desire every time. It will leave your staff empowered to do the work and rise to every occasion.

These steps when used correctly can manage workflows in the office, for remote employees and for virtual assistants. Once in place you've already got your next employee training manual and your disaster recovery documentation.