BUILD AND ASSESS YOUR WORKFLOWS

A practical guide to workflow design.

1. Map Your Current State

Before you can improve your workflows, you need to understand them. This involves documenting your existing processes to identify bottlenecks and areas for improvement.

- **List Key Activities:** Identify all the major activities your team performs.
- **Identify Owners, Tools, and Timelines:** Determine who is responsible for each activity, what tools they use, and how long it takes.
- **Sketch a Flowchart:** Create a visual representation of your workflow to see how activities connect and where information flows.

2. Define Objectives

What do you want to achieve with your improved workflows? Clear objectives are essential for guiding your redesign efforts.

- **Clarify Desired Outcomes:** What specific results do you want to see?
- **Set Measurable Targets:** Define quantifiable goals to track your progress. For example, reduce processing time by 15% or increase output by 10%.

3. Design or Redesign Steps

This is where you'll create the new or improved workflow.

- **Break Down into Tasks:** Divide each activity into smaller, manageable tasks.
- **Define Inputs and Outputs:** Clearly specify what each task needs to start and what it produces.
- **Group into Phases:** Organize tasks into logical phases to create a structured workflow.

4. Choose Tools & Standards

Standardizing tools and processes ensures consistency and efficiency.

- **Central Repository:** Establish a single source of truth for all workflow-related documents.
- **Task Tracker:** Implement a system for tracking the progress of tasks and identifying delays.
- **Naming Conventions:** Use consistent naming conventions for files and documents to improve organization.

5. Implement & Train

Successful implementation requires clear communication and training.

- **Kickoff Meeting:** Announce the new workflow and explain its benefits to the team.
- **Checklists and SOPs:** Provide checklists and Standard Operating Procedures (SOPs) to guide users through the workflow.
- **Gather Feedback:** Solicit feedback from users to identify any issues or areas for improvement.

6. Monitor & Analyze

Regular monitoring helps you ensure the workflow is performing as expected.

- **Stand-up Meetings:** Hold brief daily meetings to discuss progress and address roadblocks.
- **Key Metrics:** Track key performance indicators (KPIs) to measure the effectiveness of the workflow. Examples include throughput, cycle time, and error rates.

7. Iterate & Improve

Workflows should be continuously refined based on performance data and user feedback.

- **Retrospectives:** Conduct regular retrospectives to identify lessons learned and areas for improvement.
- **Update SOPs:** Revise SOPs to reflect any changes to the workflow.
- **Communicate Changes:** Inform the team of any updates to the workflow and provide training as needed.

Ready to Optimize Your Workflows?

Unlock the full potential of your team with tailored workflow design and coaching. Our expertise in Epidemiology & Biostatistics allows us to bring a data-driven approach to workflow optimization. Contact us today for a consultation and discover how we can help you achieve your goals .