

Talk Less, Accomplish More

Using Work Management Software to Automate
Workflows and Boost Collaboration

Table of Contents

1. Focus the Team

- a. Harness control of tasks
- b. Connecting tasks: workflow definition
- c. How to choose a work management system
- d. Sample workflow: Marketing

2. Design Once, Use in Any Area

- a. Seeing work management from a higher perspective
- b. Single instance implementation for any area
- c. Sample workflow: Finance

3. Automate Repeatable Workflow Processes

- a. Benefits of workflow process automation
- b. How to design workflows

4. Solve Common Collaboration Problems

- a. Example applications
- b. Use case: Web Team

Talk Less, Accomplish More

Section 1. Focus Efforts and Adapt Flexibly to Change

Efficient collaboration is about working together to achieve results. It's not about talking or meeting or meeting and talking or talking about meetings. It's about getting things done together. And collaborative (co-minded) work can either stumble along or proceed smoothly with everyone on task to bring important work to fruition.

Whether in finance, construction, oil and gas, publishing, scientific labs, or nearly any other type of organization, most tasks are part of a sequence of tasks, a process, involving multiple steps and multiple people. Coordinating these workflow steps is often left to manual "best efforts" and having visibility into where things stand can be a challenge. This is a sad state of affairs, especially when you consider that how well people work together on individual tasks and the overall manageability of the process can determine whether an organization meets its objectives -- or not.

To these ends, collaborative organizations often implement good concepts: workgroups, content management, and business process discipline. Teams are admonished to focus on tasks, as they should be. But the reality is that tasks are scattered across emails, meetings notes, whiteboards, and collaborative workflow processes may not be well-defined or understood, much less automated. As a result, most organizations suffer from:

- Missed deadlines and cost-overruns
- Confusion about priorities
- Poor alignment between goals and their associated tasks and priorities
- Unmanaged processes with poor visibility and accountability

More organizations are discovering that they can harness work and solve common collaboration problems using software tools to automate how individual tasks are assigned, tracked, prioritized, and updated. Having a work management system helps ensure that people are working on the right things at the right time, workflow processes are managed, and that people know the status of what's going on.

A good work management system will help you:

- Organize, track, and manage both tasks and issues
- Connect a sequence of tasks into a workflow process and automate that process by automatically generating next-step tasks at each process step
- Provide a centralized place to track work and share comments and files to expedite that work

While a workflow process scheme may seem like a static picture created as a diagram or a slide, it should actually be a computed process so that team members automatically get next-step tasks. The order of tasks will reflect the pre-designed workflow for activities such as:

- Handling change or service requests
- Hiring and onboarding
- Document reviews and approvals
- Tracking action items from meetings
- Managing changes to web sites
- Handling software bugs or support tickets

Section 2. Design Once, Use in Any Area

"It could be anything," said an executive the first time she saw a graphical automated workflow.

This is true, because specific uses actually derive from broader processes that are often repeatable across the organization. While the organization has "departments," there are business activities that happen across every work area. One such activity is a finance process, which typically includes several steps:

- a. Setting parameters of need
- b. Determining initial budget
- c. Obtaining bids
- d. Choosing a vendor
- e. Writing up Scope of Work (SOW) (often with a revisit to budget and parameters steps)
- f. Getting the SOW approved (often by legal counsel in addition to management)
- g. Generating/paying a Purchase Order
- h. Having the work performed
- i. Evaluating Return on Investment (ROI)
- j. Capturing learning for next finance decision (next year, next project, etc.)

This same activity flow could happen within the IT team when purchasing systems tools and/or services; within the HR team when evaluating health insurance plans; or within the Marketing team when setting up campaigns with various outlets. There is almost always a step for asking about budget, a step for consulting with legal, a step for running things through accounting, and so on, with typical bottlenecks along the way, such as CFO approval or running finalized deals through a finance committee.

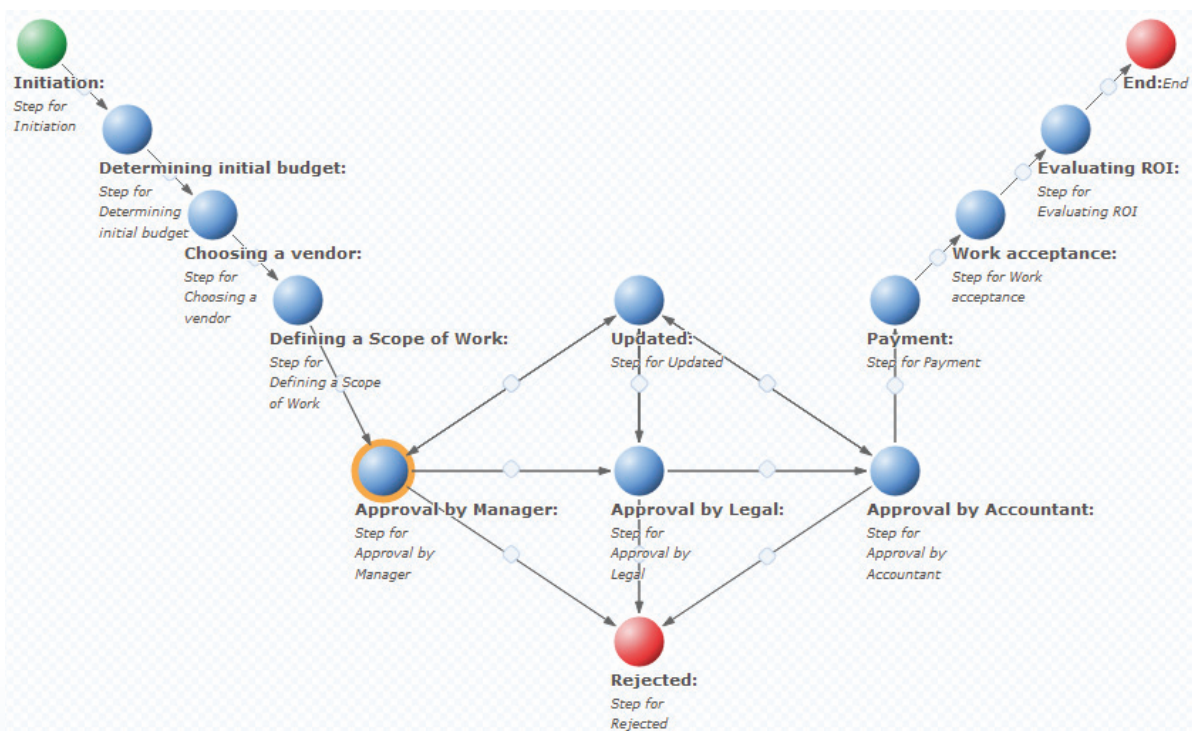
Smart companies (lean, competitive ones who want to do more than push contracts around and actually meet business objectives) figure out a way to reduce friction in these duplicated processes by automating some of this work.

If someone on the team were to spend an afternoon carefully thinking through exactly how the firm’s finance process works, one workflow could be designed to be deployed in all departments. Everything would be on one instance (no multiple solutions silo’d within departments), and everyone could work from the same data. This last bit becomes critical for doing things such as documenting past funding allocations, responding to compliance inquiries, and ensuring Return on Investment (ROI) on existing initiatives.

With the right workflow in place, teams

- Address hidden bottlenecks;
- Know (explicitly) tasks and priorities, especially as things change;
- Streamline workflow processes; and
- Plan for accountability and audit trails.

The following workflow shows a department-neutral sequence of tasks:



The beauty of this is that it generates tasks automatically based on the flow, and also provides the “catcher’s mitt” so individual users can receive, manage, and update their tasks. Plus, it works behind the scenes to keep track of status and move things along the queue.

Section 3. Automate Repeatable Workflow Processes

Imagining “departmental” work as repeatable sequences of tasks can dissolve much of the organization’s clutter, freeing up time and energy to achieve goals. By automating processes, people are freed up to focus on the next-step tasks that are part of these processes.

Using such workflows can save money and improve results immediately, in a variety of industries such as these:

- The HR department of a Kansas City hospital saved \$100,000 during its first year of actively managing digital content with an eye toward more explicit workflow processes.
- A university saved \$117,000 during its first year of a similar initiative.
- A retailer saved a whopping quarter million dollars just by switching to automated task assignment based on pre-designed workflows.¹

Designing a workflow

Have you ever thought about your workflow processes? Drawn them out? Did they match what actually happens day-to-day? Thinking about workflow process may be difficult and may involve several stakeholders to get the complete workflow picture. But, once you know what your workflow should be, designing it can be accomplished in a few minutes, if key concepts are considered:

1. The workflow must focus on overall organization goals, not strictly on making users more “productive.” It is important to take time to think through what is most important and what the overall process is, not a natural endeavor for many people. It helps to be quite detailed here, encouraging carefully thought-out roadmaps. For example, if one organizational goal is to produce innovative and technically perfect documentation with a minimal but thorough revision process, there could be seemingly competing interests, such as: writing quality thought leadership, validating content with key subject matter experts, bringing in the graphics team at an opportune stage, maximizing messaging power, and working with external production/publishing partners to distribute effectively. This team would need to think carefully about all of these different stages and ask detailed questions:
 - a. “How exactly do we produce a document? Who writes it, revises it, are there timeline constraints, who does graphics, at what point do we bring in the marketing team, who checks final work, who distributes, who publishes, is there an external contributor?” And other such questions.
 - b. The team also needs to rigorously consider any existing processes and honestly determine where these are ineffective.
 - c. Finally, it’s important to creatively imagine which of the processes could be automated.
2. With clear thought about these considerations, a graphical representation can be produced that would actually create tasks at given moments.
3. It could be implemented with a few clicks without too much worry that the design is perfect because it could be changed “on the fly.”

Interesting idea, but managing workflow processes and tasks with a collaborative work management system represents change and “more work” for most organizations, and overloaded teams sometimes prefer to let collaborative work keep stumbling along rather than switch to something different that would actually help. So choosing the right kind of system is important.

Choosing the Right Solution

Evaluating available tools can be simplified if certain tips are followed:

1. A task management system should be embedded in a familiar interface, such as Microsoft Outlook
2. Users should be able to combine any sequence of tasks into a process

¹ The Top 10 Things You’ll Save with ECM, Perceptive Software, Inc., 2010

3. Task management should be integrated with workflow automation; almost all task management and workflow management tools are not integrated so team members have tasks in two places, not a good thing
4. The tool should function so that a non-programmer can automate workflows. Features to look for: a visual workflow builder and “drag and drop” commands
5. A workflow automation tool should include embedded versioning
6. It should also be accessible via a web-browser
7. The team should receive tasks in email, and even be able to work on tasks from their Outlook accounts so that the automation tool is hand-in-glove with their regular workspace.
8. The design cycle should be light, meaning workflows don’t have to be “perfectly” constructed at the outset
9. Finally, the system should be nimble enough that it can be started with a single click, and changed “on the fly.”

Section 4. Solving Common Collaboration Problems

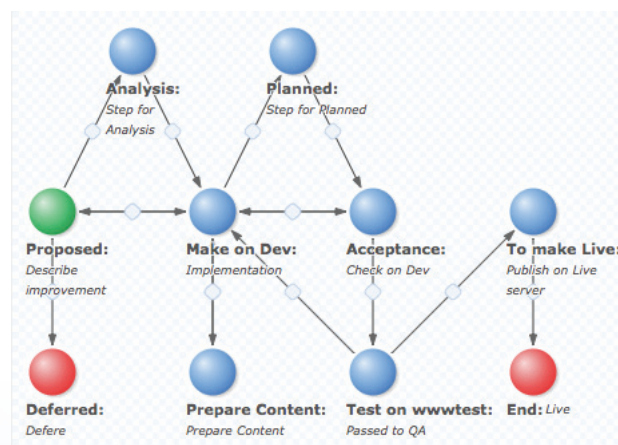
Collaboration is not so much about talking. It’s about working, getting things done, the right things, at the right times, by the right people, with visibility along the way. This isn’t theoretical, but is borne of very common real-world problems. Here are a few examples:

1. A contract is lost in the approval process (legal was supposed to review but no one followed up), and the deadline for a renegotiation cycle has passed. This results in thousands of dollars of extra costs. Even worse, no one realizes this has happened, so next year the same result may occur.
2. A certain software bug exists in three products but the developer only knows to work on one of the products. She wasn’t at the meeting where the bug proliferation was discussed, and no one on the team realizes this.
3. A department manager is called to give the status of an important work item involving competitor intelligence, but he honestly has no idea where things stand and has no time to find out.

They are incredibly common problems, and are not at all industry-specific. A couple of short use cases illustrate the point:

The owner/director of a leanly funded private school must provide proof during surprise audits that all documentation for each teacher is in order. But there is basically no administrative staff and the director worries deeply about the school’s ability to meet this requirement; teachers come and go rapidly, making it very difficult to keep track. Did the fingerprints come in? Did the transcripts arrive? How about the TB test results? The consequences for failing to comply are quite serious. If the director had automated this repeatable work, she would be able to respond to any audits with confidence, and also enjoy more time to accomplish critical business goals: recruit more families, improve curriculum, reach out the community, and observe teachers.

Another example is a medium-size firm implementing Web site changes. The market for this firm’s product is morphing very rapidly, so updating the Web site is a critical business activity. Unfortunately, it involves many different people, often in different time zones, all of whom are stretched thinly: copy writer, search engine specialist, market strategist, product expert, Web developer, systems administrator, and graphic designer. It’s a varied team, to be sure. And if they don’t work quickly and effectively, by the time they implement an improvement, the market may have changed again. However, with the right automated workflow, the repeatable (and oft-repeated)



process would follow a pre-determined path, like this:

1. At Start, an improvement is proposed and then either sent for execution, analysis or deferral
2. From the Implementation step, tasks for planning, acceptance or content preparation are generated
3. At the appropriate next-step, testing takes place
4. Finally, the change is published and goes to End.

The workflow itself shows what status each piece is in, and any audit that might take place can be satisfied quickly on a real-time basis. The flow may look deceptively simple but it is actually accomplishing quite a bit (and can be changed on-the-fly). Each task is promoted to the next step, as appropriate, and the next-step task is automatically generated based on design. This has freed up each team member to focus on individual portions of work, and also provided ongoing status checks of where in the process a given change resides.

To summarize, by automating repeatable core work, moving individual tasks into a pre-designed sequence, and increasing visibility into the status of projects, automatic workflows can make collaborative work more effective. A small amount of effort put into understanding how an organization's processes function can maximize efficiency, focusing the team on important goals. Designing a workflow can be accomplished with some careful thought and modified as things change, reducing the need for complicated, front-loaded programming cycles. Plus, the best software includes a "catcher's mitt" for receiving tasks automatically generated from workflows. In these ways, small-to-medium businesses and areas within enterprises truly dissolve collaboration friction and attain goals effectively.

About Comindware

Comindware is a pioneer in collaborative work management software for teams across the enterprise. Its mission: to help people work together more efficiently and effectively. Unlike competing products based on relational databases, Comindware® Tracker™ and Comindware® Task Management™ are based on a far more flexible data management foundation called [ElasticData™](#). A privately-held firm, Comindware is headquartered in Silicon Valley and Moscow and can be found at www.comindware.com