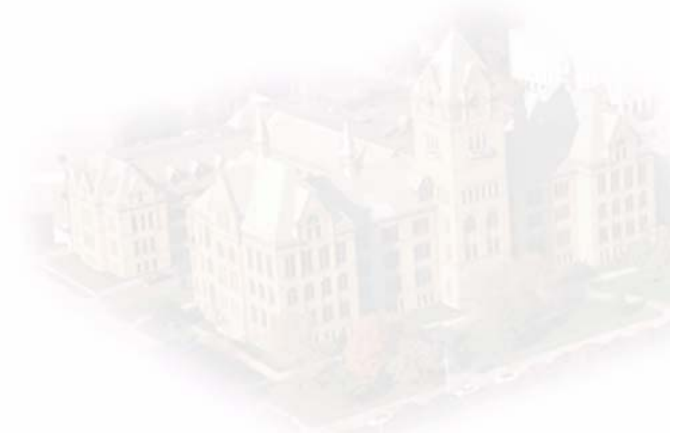


Workflow – What It is and Why You Need It

Presented by: Gayle Reynolds

November 8, 2007
Session ID: 1.3



Workflow Definition

- Workflow:
- “...the automation of a business process, in whole or part, during which documents, information, or tasks are passed from one participant to another for action, according to a set of procedural rules.”

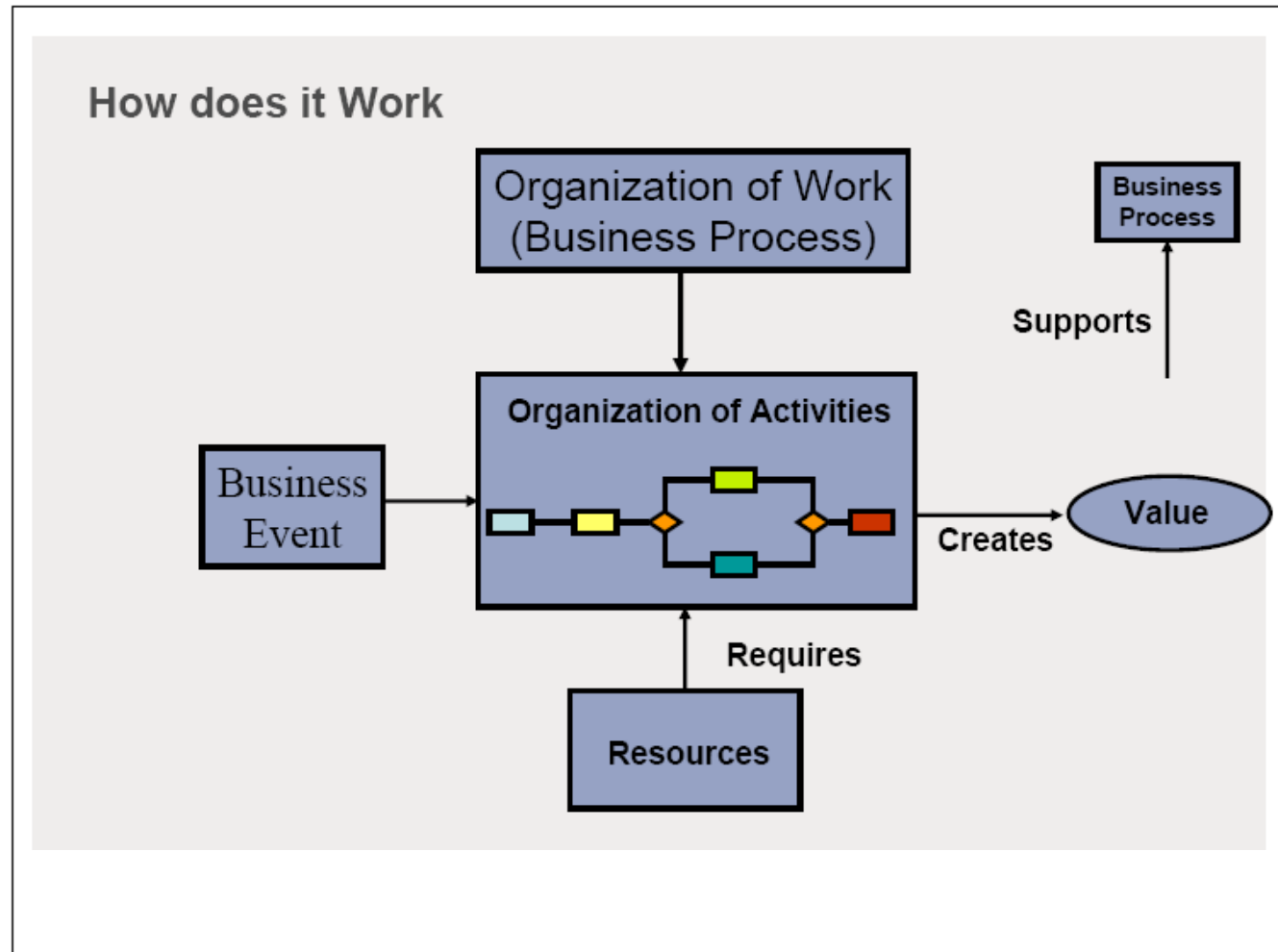


Workflow – What does it do?

- Workflow...
 - Automates business processes to meet your business needs
 - Sends work to the right people at the right time
 - Allows tracking of processes

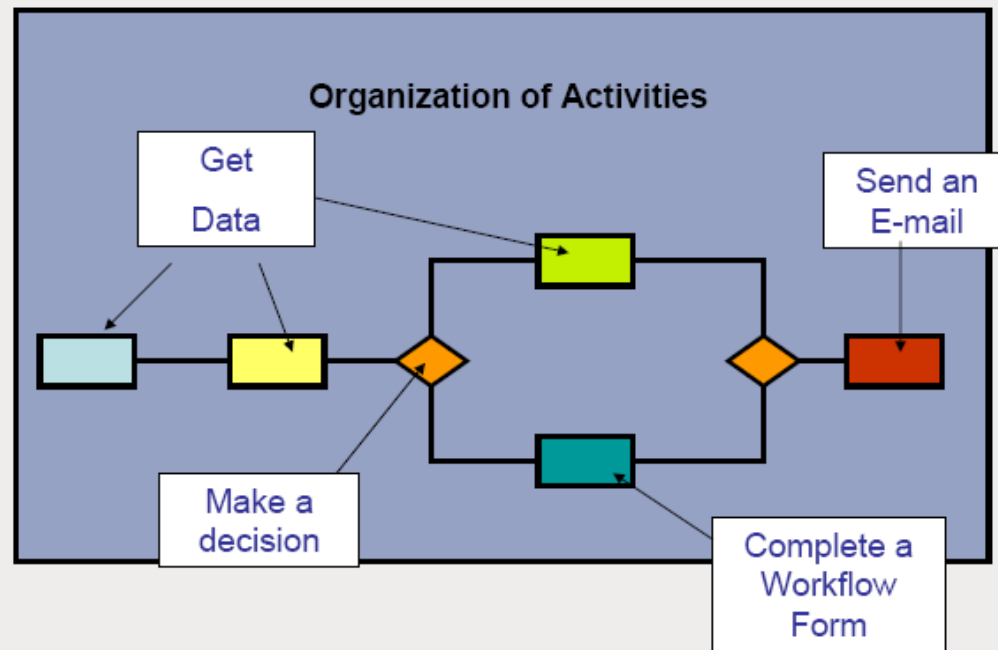


Workflow Process

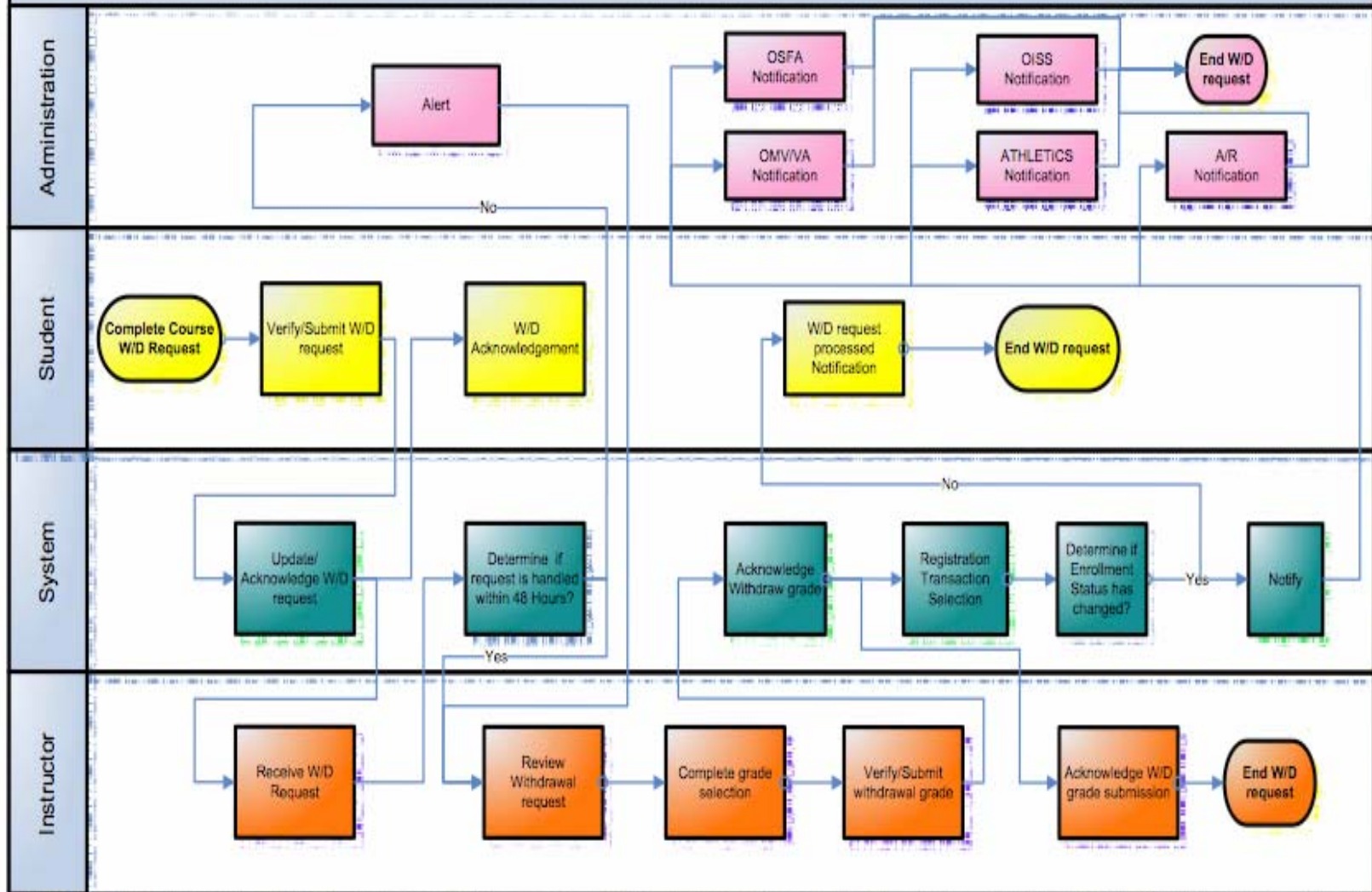


Workflow Process Continued

Deeper...



Wayne State University – Course Withdrawal
 Business Process Analysis Current State
 Begin: Students complete the W/D request form
 End: Students receive the W/D processed notification
 Effective:



Overview

- How can workflow be used to improve processes?
 - Improve communication
 - Enforce consistent procedures
 - Enforce adherence to policies
 - Provide faster response time
- How can you benefit?
 - Workflow may be a solution to current problems
 - Workflow may be a means to improve procedures



Benefits of Workflow

- Improved communication
- Consistent processing
- Adherence to procedures
- Enhanced responsiveness
- Increased productivity



Workflow Value

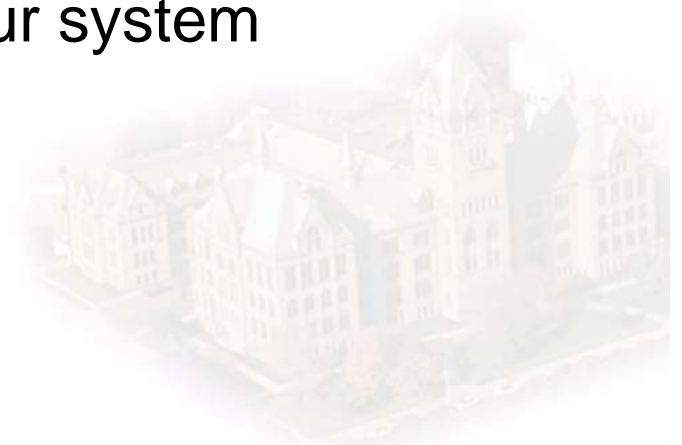
What can you do with workflow?

- Identify a problem to solve
- Design your own solution
- Define your measurements of success
- Measure and monitor performance objectively
- Improve organizational performance
- Elevate staff morale



Workflow Strengths

- Passes work from one role to another
- Captures data from many sources for use in decisions and activities
- Provides notifications through email
- Follows approval paths
- Updates information in your system



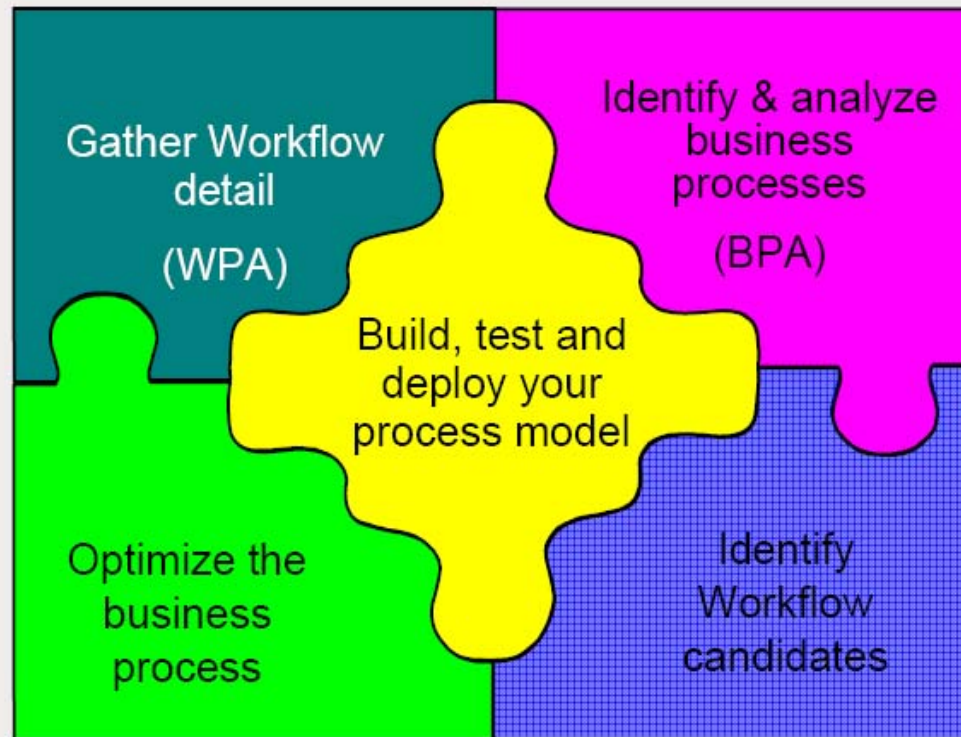
Workflow Weaknesses

- Support work by one user done sequentially
- Mass processing to large numbers of records (batch processes)
 - Batch processes can be incorporated into a workflow
- Manual, single-activity tasks, unless notification is required to alert someone of the work



Workflow Analysis

Analysis Phase of WF Implementation



Identify Processes for Redesign

- Selection criteria:
 - Add value for your customers/department
 - Contribute to organizational goals
 - Have potential for significant improvement



Identifying Processes for Redesign

- Potential for Significant Improvement =

Broken Process

+

Feasibility of Redesign

- No. of organizational units involved
- Cost
- Strength of team
- Commitment of process owner



Examples of Workflow Projects

- Withdraw a Student
- Grade Change
- Admissions Approval
- Transfer Credit Approval
- Change of Major
- Purchase Requisition Approval
- Hire a Full Time Staff Member
- New Employee Security Set Up
- Process Verification Documents



Implementing Workflow

Identify Business
Processes



Analyze These Processes
(BPA)



Identify Workflow
Candidates



Gather Workflow Detail
(WPA)

Implement
With the
WORKFLOW
product!



Workflow Process Analysis

- Identify higher-level business process with which the workflow is associated.
- Name and describe the workflow:
 - State business goal of business process and the workflow
 - Identify boundaries – start and end of the workflow



Workflow Process Analysis

- Establish participants
 - Involve people who actually do the work
 - Identify a change agent
 - Identify workflow owner
 - Super user responsible for technical maintenance of workflow
 - Identify workflow administrator
 - Functional owner



Workflow Analysis

- Meet with functional users to document the current business process, including roles/approvers.
- Have functional users review the effectiveness of current business process. Make changes, if necessary, and document the revised process.
- Have functional users review the current processes' paper forms and edit if necessary.



Workflow Analysis

- Multiple people and departments involved
- Structured processes revolve around information stored in one system
- Automatic or manual updates needed in system or other applications
- Have a business event automatically launch a workflow



Workflow Process Analysis

- Describe the event that starts the workflow
- Create the workflow model
 - List and sequence the activities
 - Identify hidden activities
 - Identify decision points
 - Determine the activity and/or output that complete the workflow



Workflow Process Analysis

- Gather details for each activity and decision
 - Type of activity – automated, interactive, manual, approval, e-mail, etc.
 - Define parameters/data
 - What data is required for activity to start?
 - What data is passed back to the workflow?
 - What data is needed for decisions?
 - Where and when to get that data?



Workflow Implementation

- Use workflow for normal processes
- Don't try to make workflow handle all the exceptions
- Keep it simple
- 7 to 12 activities in a workflow



Workflow Optimization Techniques

Apply these four steps in order:

1. Eliminate – duplication, reformatting, hand-offs
2. Simplify – forms, procedures
3. Integrate – centralize or decentralize
4. Automate – approval processes



Process Redesign

- Process redesign approach
 - Challenge all assumptions
 - Think outside the box
 - Tip over the silos



Keys to Success

- Proper training
- Proper identification and analysis
- Focused team effort



Thank You!

Gayle Reynolds

greynolds@wayne.edu

Scott Owczarek

owczare6@msu.edu

Kurt Kruschinska

ac5753@wayne.edu

Christine Stephens

ds9581@wayne.edu

Linda Falkewiecz

ab4753@wayne.edu

