Workflow – What It is and Why You Need It

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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

How does it Work

Organization of Work (Business Process)

Business Event

Organization of Activities

Resources

Value

Supports

Creates

Requires
Deeper…

Organization of Activities

- Get Data
- Make a decision
- Send an E-mail
- Complete a Workflow Form
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

- Gather Workflow detail (WPA)
- Identify & analyze business processes (BPA)
- Build, test and deploy your process model
- Optimize the business process
- Identify Workflow candidates
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

1. Identify Business Processes
2. Analyze These Processes (BPA)
3. Identify Workflow Candidates
4. 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!

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