

# Step Up Your Operational Game with **Workflow Management**



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You're ready. You're going to bring your "A game". You want to win. You are going to take control of the disorder and confusion plaguing your business by stepping up your operational game with workflow management.

But before you choose your game piece, before any cards are dealt, or any wheels are spun, we're here to give you the keys to winning the game. To be the champion you must improve workflow management at your organization by making processes simpler and more visible in an effort to save precious time and money.

## Choose your game piece

When your processes are disjointed, it can be a challenge to even know where to begin. In planning your strategy, you can lose sight of your overall goal. But how do you know that you're going to win this workflow management game when you can't see the entire game board?

Some managers begin by choosing their game piece, only to hide cards and money from their opponents. When it comes to workflow management, ask yourself if you really want to be the only

player who can see or access the whole game board. A lack of transparency will only cost you in the end, because it will isolate you from colleagues, who might be making mistakes because they can't see the whole playing field. Since you are all on the same team at your business, eliminating silos helps everyone win.

**Siloed data is undesirable because it creates communication barriers.**

Siloed data, like that found in spreadsheet-based workflows, is undesirable, because it creates communication barriers between divisions. This means divisions work in isolation, which negatively impacts the workflow, because there is a lack of integration between functions. Not only can siloed data and workflows cause problematic internal communications, it can also cause critical data to get forever lost in the shuffle of everyday operations. By having a concise game plan and seamless workflow processes, data that was once locked in spreadsheets or inefficient workflows, can be used to drive informed decisions across your entire organization.

## Start the game clock

You need to understand the objective of the game and how to achieve these goals in a way that takes time and money into account. Why are you building houses only to replace them with hotels? Don't waste time when you need to accomplish your goals. Without structured workflow management, a team can waste time going back and forth on emails and phone calls to understand and determine next steps. Time is wasted going back to discuss plans, updates, etc. that have already been discussed in a previous meeting. Remember: time is money.

Are you losing the game when you just got started because of miscalculated risks, a bad roll of the dice and bad strategy? Talk about frustrating!

Poor workflow management can cause a plethora of frustrations, especially when people, processes and tools are disconnected. Common pain points of inefficient workflows are:

- Lost data
- Lack of centralized reporting
- Limited collaboration
- Task duplication
- Lost work
- Inability to share knowledge
- Confusing processes
- Unreliable tools
- Difficult Excel-based reporting
- Questionable data integrity
- Wasted time

## Go back two spaces

Statistics show<sup>1</sup> that between digital and human factors, there are typically only three minutes before an employee gets interrupted by a colleague, or self-interrupted. It can often take up to 23 minutes before you get back to whatever task you were completing before the interruption occurred. It is important to understand which distractions impede your ability to work efficiently and collaboratively. When you're able to identify harmful distractions and improve processes to remove these roadblocks, you're going to produce better results, personally and for your company.

**Remember: You're not just playing a simple game with your team. Workflow management is serious business. Sending your opponent back to start or rolling doubles—these might be fun distractions during a game, but you can't afford to have distractions during work.**

<sup>1</sup><http://www.wsj.com/articles/SB10001424127887324339204578173252223022388>

Lack of mobility can also often be a drawback when trying to complete a task. When workflows don't extend across mobile devices, you don't have the option to complete your task if you are away from your desk, which sets a number of boundaries for when and how you will be able to complete your necessary work.

No one enjoys spending money on unwanted necessities or losing a turn in a game. Just as in real life, there are job responsibilities that no one likes to do. Rather than forfeit the game when you encounter these daunting tasks, it's better to see how these processes, tasks and outcomes can be improved and automated using workflow software.

Move one step forward and two steps back. Just when you think you're getting ahead in the game, you sometimes find you're spinning your wheels. When you have multiple teams working toward one goal in the absence of an efficient workflow, it's easy for communication and collaboration to fall behind. Often this leads to duplicated work, missing components and prolonged completion times.

## Lose a turn

Managers have tried every angle to beat the disorder and confusion plaguing their businesses. Unfortunately, without a winning strategy, you're looking to win a single turn and not the entire game. Temporary moves won't solve the long-term issues.

While trying to solve your organization's workflow management dilemma, each potential "solution" costs your company money and your employees' time. We have all seen the managers that seem to move aimlessly around the board—looking for insights and help from a variety of sources that don't seem to offer any long-term strategy, such as:



**Sharing the latest industry trends through email**



**Buying business process books**



**Using free tools**



**Creating spreadsheet- or email-based workflows**

Despite everyone's best efforts, there is a reason these "solutions" might not resolve all of your workflow issues. The disorder is too great to conquer with a piecemeal approach or by trying out new methodologies again and again. It requires a clear vision and concrete strategy to connect people, processes and tools.

As a manager, you need to have a game plan. You need to move with intention. Look at the complete game board and then make your move. In the real world, this means using data to inform your decision making and to break down silos that exist across departments.

Think twice before going all in on a **heavy, inflexible** enterprise workflow solution.

In addition, you need to act when the time is right. If you know the card or piece you need to win, make a move to get it. Look at what is at stake without it, and estimate the gains that you hope to achieve. In other words, examine what your processes will be without it and ask what's at risk if you don't take action.

Likewise, as with any board game, you need to evaluate your budget. Consider how chess pieces each have their own value and movement rules. This concept is not unlike the tools available for improving internal processes. But these varying values can make it difficult to know what tools are worth the investment and which ones aren't.

You know that just because a workflow management tool is expensive, it doesn't mean it's the best. Many players get excited about using their limited budget on the most expensive properties. That said, it's important to consider more than just the price tag and look to how the properties fit in their overall strategy.

You might *want* a big, fancy workflow management solution, but in reality, a simpler, adaptive and more cost effective solution might be a better fit. Be careful not to limit yourself to a heavy enterprise solution that is inflexible. If your internal operations and processes change often, a solution that can be easily updated and modified as your business needs change might be a better overall strategic fit.

## Get out of jail free

Bringing order to the confusion and developing an effective and long-term strategy for managing your workflow only comes when you take a look at the big picture, understand your game plan and execute against a winning strategy.

In any game, you want to know what you're working with. You want to know the players and what each one does best. It's imperative that you understand your organization's workflow by identifying your processes from beginning to end. Identifying key team members, how teams communicate internally and with other teams, and each individual and teams' responsibilities is of equal importance. From there, you should be able to pinpoint where you have inefficient processes, duplicate work, and/or any steps in your processes that cause miscommunications and unnecessary delays in operations.

Formulating a game strategy is a key step to success. Know the game and know the moves you need to make to win. Now that you know where you have inefficiencies, operational delays, and lagging communication between and among your teams, you're equipped to identify where a workflow management solution could improve and streamline your operations. This information will also allow you to choose the solution that best fits your organization's needs in terms of size, flexibility, speed, cost and scalability.

Formulating a game strategy is a **key step to success**. Know the game and know the moves you need to make to win.

Once you understand your players and your strategy, you're in position to go for the win. Having located where process improvement is needed, where automation can improve efficiency, and where a workflow management solution makes sense for your organization, it's time to seize victory and buy Boardwalk.

## Win the workflow management game

Using a winning workflow management solution will establish standardization, which helps prevent miscommunication, wasted time and money, and disorganization. By having a solid game strategy, managers can eliminate flaws in their operations and more easily make their way around the board without any hiccups.

Armed with a unified and comprehensive workflow management system and strategy, you will eliminate disjointed efforts and inefficient processes. Each team member involved with the process will be connected and be working toward a common goal. Additionally, team members will have visibility into where projects stand, what steps are completed, and what work still needs to be performed. This will allow for more seamless communication and work than ever before.

You will not only win the game; you'll also be saving time and money along the way. The workflow management "game" becomes more fluid and concise when:

1

You have the right tools in place

2

Have created a system that connects people and processes

More importantly, you'll also be able to show others how to win at workflow management.

## About TrackVia

TrackVia is an online workflow software that helps businesses rapidly deploy their own Web or mobile applications to easily streamline data collection and manage operational processes.

TrackVia's detailed dashboards and real-time reporting give you enhanced visibility into your operations, and its unrivaled mobile capabilities make it easy for employees to enter data, scan bar codes, geotag locations, check reports and collaborate on any iOS or Android device.

### TrackVia, Inc.

1675 Larimer Street, Suite 500  
Denver, CO 80202

### TrackVia Support

<http://help.trackvia.com>  
800-673-3302

### TrackVia Sales

[sales@trackvia.com](mailto:sales@trackvia.com)  
720-625-3460