

Making your workflow more efficient

If you're running a business, you have a workflow. But this is not being run as efficiently as it should for many firms, writes Wayne Smallman, founder of Octane Interactive



Whether your organisation consists of a team of people or just you alone, you have a workflow - the series of connected steps your business activities pass through in sequence everyday. You might dislike the idea that you follow set patterns, but if you're running a business, you need to understand these processes in order to keep things running smoothly.

In real terms, your workflow is everything that happens within your business to get things done. It's how you deal with jobs as they come in, what happens to that job on the way out, and everything you do in between. The next time you lose a jotted note, or misplace a file on your computer, that's your a glitch in

your workflow.

The common misconception is that all workflows are computerised, but this isn't the case, nor need it be. Whether it's managed by pen and paper or fully computerised matters not; what matters is whether it is working for you. Like most other things in business, the key to a smooth workflow is to be consistent and systematic. Find a way of working that you're happy to work with and works for you, then stick to it.

If you send an email to a supplier requesting more of ingredient X for your Whiz Bang fizzy drinks, that email is the beginning of an audit trail. So when that same supplier replies, that audit trail continues. Where you store that email is a vital part of your workflow - leaving it in your inbox is not optimal. If something goes wrong, you'll want access to every element of the conversation that led to that order and anything said since, so that you are in a position to put things right. This could be confirmation emails, sales staff out in the field, as well as communication from other departments such as your warehouse.

So, to make sure things run smoothly, you could use email to manage projects:

- Create groups in your address book software, with one for each aspect of a project or for each particular process.
- Assign people to those named groups.
- When you send an email, you should have the option to send to those groups.
- Some email software even allows you to set the priority of the email, which is an added attribute that could prove very useful to your workflow, quickly flagging the most important communications of the day/project.

Since you are likely to be sharing this system of categories with clients, suppliers, and others in your team, it's a good idea to give some thought to the labels you use to describe certain activities, tasks and processes - one person's 'thingamajig' is another person's 'whatsit'. By having an agreed series of definitions and groupings, you're eliminating a common ambiguity in business communications, both internally and externally.

These categories can then be carried over when you start to measure and quantify what you're doing, and more importantly, what you've done. Many people use computers to create task lists attached to projects - from pen and paper, to the task list built into Microsoft Outlook, right up to bespoke content management systems - again, the key is to label and group jobs as described above, so that you're not simply lost in a never-ending list of unprioritised tasks.

If your workflow is relatively simple, some coloured pens, a few Post-It notes and some ordered lists could be all you need. Computers tend to take over from pen and paper when the categories and labels become too complex, but they can't bring automatic order to a disorganised workflow.

Unless you're totally confident that you and your team are using the right software, don't be fooled into thinking those documents you saved last week will still be in the same place next week, especially on a shared computer. If you're lucky, they've only been moved. If you're unlucky, they've been deleted. And things get measurably worse if this ad hoc workflow persists across the entire business - measurable in the number of hours lost by each team member trying to find that valuable email or vital document.

In a well-functioning business, every member of staff has a firm handle on their own workflow and how this interacts with all the other processes that make up the total workflow of the business. Buy in the latest thing in shared file technology, or commission a content management system without this company-wide understanding and you're likely to find you've simply traded one form of disorganization for another.

A workflow is as much about simplicity and ease-of-use as it is about formality and structure - if you're not comfortable working that way, your work won't flow.

For more information please visit www.octane.uk.net