

HOW TO CREATE A WORKFLOW IN 7 STEPS



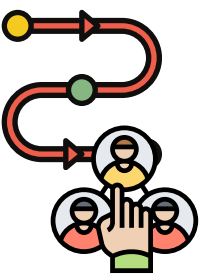
1 IDENTIFY

Ask what part of their process needs to have a workflow (ex., on-boarding process) and create a workflow draft for that process.



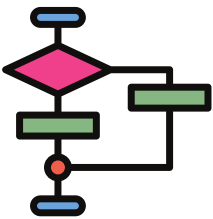
2 BRAINSTORM

Discuss & identify with your client all the tasks that need to be in your workflow



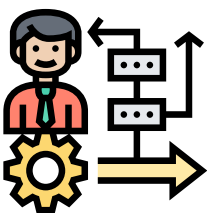
3 ORGANIZE THE TASKS

Once you've identified all the tasks you need to work on, start organizing them in steps. Make sure to identify the person who will do the next procedure (if there's any).



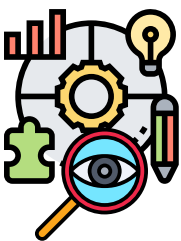
4 CREATE A DIAGRAM

Once you've organized the workflow, you can draw a diagram on how it visually looks like (either via paper or online tools)



5 FINALIZE & DOCUMENT

Have your client review the workflow you created and once approved, deliver them the final written docs



6 TEST & EVALUATE

This will happen down the road as you get used to doing the tasks. Make sure to update the workflow according to your client's process



7 DOCUMENT & IMPLEMENT

Revise the document based on the team's agreed modifications then implement.