

Mapping Your Workflow For Success With Integrify!

Start with the end goal in mind -

Recognize that your initial workflow goal should never be perfection and that a healthy workflow will be fluid. Every workflow should be challenged over time as the organization matures.

- A. The goal at the end of this workflow is -
- B. How many departments does this workflow interact with -
- C. What department & person would be considered the “owner” of this workflow -

Workflow Creation at a High Level

- A. Sketch out what you believe the process currently looks like
 - 1. Include any people/positions that in the place of the workflow
 - 2. Include touchpoints/forms/data entry places
- B. Call a meeting (virtual or in person) for all individuals listed in your sketch
 - 1. Display what you have sketched out to the team
 - 2. Go over the process in detail from what you know
 - a. Ask for clarification on steps, forms & people/positions if what you have sketched is either incorrect or missing information
 - b. Acknowledge that each individual is the SME of what their task(s) is within the workflow
 - 3. Document all the changes with information learned & distribute to team members.
- C. Repeat the above, including new team members, if needed, that were not included in the original workflow as known to you.

Documents & Details Gathering

- A. Meet individually with each person in the workflow to understand what their part in the workflow consists of.
 - 1. Get a copy of the form(s) or screenshots of any data entry that is done for each step
 - 2. Take note of any potential overlaps, bottlenecks or dual data entry points that you notice

Workflow Finalization & Implementation into Integrify

- A. Create the workflow within Integrify
- B. Call a meeting with the entire team to roll out the workflow at a high level
- C. Individually or in group sessions, conduct training for each step
- D. Celebrate & Go Live!