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**HOW TO BUILD  
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# HOW TO BUILD EFFECTIVE WORKFLOWS FROM SCRATCH

Workflows increase efficiency by helping you visualize and organize your work. They also provide better insights into tasks, improve accountability, and deliver consistent outcomes. While each might be unique, they utilize general building blocks to refine your organizational structure. Workflows are essential because they remove uncertainty regarding who is responsible for each aspect of a project. The benefits include higher productivity, better resource allocation, streamlined coordination between team members, and enhanced project visibility.

## 7 Practical Steps to Creating Effective Workflows

There are various workflow triggers and outcomes depending on your needs and the responsible department. For instance, a sales team could create an approval workflow to handle redline contracts. Other examples include a campaign workflow for your marketing department and employee onboarding workflow for your HR team. The implementation steps include:

### 1. Ideation and Planning

Every project begins with an idea. You might have a solid understanding of how to proceed, but still have to formulate new initiatives and guiding principles. This step typically involves gathering unstructured information and brainstorming. It's crucial to clearly outline the beginning and end of each workflow for accurate measurement of its success or efficiency.

Creating boundaries allows you to assign specific tasks to team members, making the remaining steps easier to implement. Setting boundaries involves identifying the starting point or trigger and the outcome or endpoint.

### 2. Establish Individual Components

The planning process helps you determine all the information, activities, systems, and people you need to achieve your objective. The next step involves bringing these components together according to your workflow's framework. It is essential to include all the elements that impact it in any way.

There are three crucial components to consider, one of them being the actors. This term refers to the people, tools, and systems necessary to enable the flow. The second component is work, which encompasses the steps, activities, or tasks required to achieve the appropriate outcome.

The third ingredient is information, which covers the documents or data you need to maintain accuracy while implementing your project. Once you have all the components in place, it's easier to arrange your workflow logically.



### 3. Create an Orderly Sequence

You can arrange your workflow using a pen and paper, on a whiteboard, or via a drag and drop management tool. A terminal indicates the start or end of a flow, while a decision is a point that must satisfy a condition such as a binary yes/no answer. You can use various documents, including forms, paper, email, and other static types of information.

Connector symbols also help you monitor complex flowcharts across multiple screens. Another aspect of workflow sequencing is the Input/Output or data symbol, which indicates a section that produces or requires information. Keep your symbols as simple as possible while illustrating a workflow because your audience might find standard symbols complex.

### 4. Resource Allocation

To implement your plan, you must allocate the appropriate resources. Improved visibility allows effective prioritization and task assignment based on your team's capacity. Although you might want a workflow that optimizes productivity, it's advisable to allow creativity. Successful workload management maximizes employee output while eliminating boredom.

Workflow automation allows your team to save time by handling repeatable tasks and accurately routing work to the most capable members. It also gives you a better understanding of the workload, which enables efficient rescheduling or reassignment when necessary. Apart from prioritizing the most crucial tasks, members should be able to adjust deadlines if it's beneficial to the overall outcome.

### 5. Workflow Development and Review

This step is arguably the most intensive of your workflow-building process. It involves outlining project deliverables, reviewing your progress, and receiving stakeholder feedback. A streamlined workflow makes it easier to sort and allocate files. It makes sense to have all your information in a central pool because document-related tasks make up a significant portion of the project.

Problems also tend to arise at sections involving handoffs. That's why it's essential to review each transition, whether it's happening physically or virtually. Apart from signing off on their specific portions, each team should also provide relevant feedback about their successes and challenges. In addition to easily identifying problems with the workflow, reviews help avoid duplications.

### 6. Tracking Progress

Projects often require or create significant data spread over various tools. This disorganization makes it hard to keep your team on the same page and generate accurate progress reports. An effective workflow should allow all stakeholders to view status updates from one location so they share the same context.



For instance, an update that mentions project delays should also include suggestions on how to bring it back on track. That way, every team member can re-strategize to solve the most pressing problems. Avoid posting updates on every little detail, or they might derail the entire project. Other than adding context, practical updates include completed milestones.

## 7. Approval and Optimization

Approval from executive leaders is typically the final step of building an effective workflow. However, it's not always easy to receive. You can solve this issue by including an approval workflow that automates the process of receiving stakeholders' endorsements. Instead of physically seeking their signoff, you can send the request online, which they can respond to with a simple click.

Workflows are similar to machines, in that they require periodic tweaking to maintain optimum efficiency. Regular maintenance gets rid of redundancies while maximizing data sharing with connected applications. There are various ways of improving workflow efficiency. They include saving time using templates, automation, structuring data gathering using forms, and integrating third-party apps.

Tracking and reporting are also essential aspects of effective management. Workflow software helps by providing an intuitive dashboard, deep insights, and comprehensive reports. Overall, it becomes easier to manage deadlines and identify issues with handoffs.

## Final Thoughts

Workflows are effective at streamlining work and improving accountability. It's essential to fine-tune them to keep up with the needs of a growing organization. At the American Society of Administrative Professionals (ASAP), we equip you with all the resources necessary for executive success. They include training materials, events, and certifications. Our free weekly resources also keep you in touch with industry trends. Sign up today to enjoy all the member benefits.



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