Need help? Watch the lesson.

Workflow Implementation Planner.

Implementing workflows in your business requires commitment and a plan. Use this implementation planner based on industry standard and best practices.

		TASKS	OWNER	DUE DATE
Get Started	PREPARE	☐ Define what success looks like and identify specific goals you want to achieve with workflows		
		☐ Determine readiness using the Workflow Readiness Quiz		
		☐ Identify and solve for potential challenges		
		☐ Identify implementation owner		
		☐ Agree and sign-off		
Month 1	ARRANGE	☐ Collect any currently documented procedures/checklists/guides that are utilized across all business processes		
		☐ Utilize SEI's workflow library for templates		
		☐ Discuss the major business processes with all the stakeholders of your firm		
		☐ Brainstorm and document your top 3 business processes that are repeatable		
		☐ Assign process owner(s)		
	DELEGATE	☐ Use the Role Assignment Chart to define roles for each business process(es)		
		☐ Take a baseline measurement of time to complete each processes. Use to measure changes in efficiency pre- and post-workflow. Capture in the Role Assignment Chart.		
		☐ Meet with leadership or as a team to review the Role Assignment Chart and discuss distribution of workload		
Month 2	DOCUMENT	☐ Document your top 3 business processes using the examples on the Workflow Creation Framework *Tip: Do not enter details yet*		
		☐ You can use a piece of paper, spreadsheet, online document or the Workflow Swim Diagram Template		
		☐ Discuss how the process meets your service model expectations and adds value for your ideal client persona		
		☐ Get team sign off on the process steps/roles and due dates		

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Month 2 cont.	EXPAND	☐ Each task owner should take turns adding in details individually. Make sure to include hyperlinks, navigation instructions, decision points, and email template hyperlinks (saved on a team drive)		
		☐ Meet with the workflow owner to approve or suggest any changes		
Month 3 & 4	MECHANIZE	☐ Mechanize your workflows into CRM or workflow application (if applicable) OR format into a checklist		
	TRIAL	☐ Begin Trial Period (utilize questionnaire on the Workflow Activation Checklist)		
		☐ Meet weekly with workflow owner and task owners to discuss what is working/not working		
		☐ Adjust tasks/timing/role assignments as needed		
		☐ Update descriptions as often as needed		
Month 5	ANALYZE	☐ Begin Analyze/Improvement Period (utilize questionnaire on the Workflow Activation Checklist)		
		☐ Use CRM or workflow reports to measure the efficiency and productivity of your newly mechanized processes *Tip: Use improved efficiency to get team or leadership buy-in.*		
		☐ Look for tasks that can be automated or workflows that can be triggered by dates, calendar data, or client data and set up in automations		
		☐ Meet with technology owner(s) to decide if there are any technology automations that are not being utilized and establish		
Ongoing	ONGOING	☐ Schedule ongoing review process (utilize questionnaire on the Workflow Activation Checklist)		
		☐ Use Business Planning Toolkit to continue to set annual goals for your operations		