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happen before you configure or use workflow software.

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A workflow is a formal customized business process, a method multiple team members with differing responsibilities can use to feel confident they understand each other, agree on how work will be handled, and are able to measure and plan based on consistent results.

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- What starts a workflow?
- What tasks happen in each step and who performs them?
- What ends a workflow?

Write a goal statement. Once you and your team document an existing workflow, revisit the intended goal of that process. What does success look like when the workflow is complete? When all pertinent members of a team document and agree on what a successful outcome is, achieving consensus on a standardized process is simple because all of the decision makers have already agreed on where they are, where they want to go and can consider each of the possibilities quantitatively.

Add, change or adapt. With a documented existing process and clarity regarding what you are trying to achieve, the next step is to adapt and improve the existing process by eliminating redundancy and including the capabilities of new tools. This step is not only an intellectual exercise. Subject matter experts should consider it to be hands-on and iterative. The idea is to reveal the best method possible at your firm.

Review for consensus. Incorporate the findings in Success Factor 3 (above) into your documented process and meet with all relevant staff to confirm that everyone involved believes it will work. Until consensus is achieved, have subject matter experts return to Success Factor 3 (above) to re-tune the process until consensus is achieved.

Chuck Wilson, Senior Client Solution Specialist with [Doc.It](#), provides implementation consulting and training services to clients. Prior to joining Doc.It, Chuck worked for a public accounting firm managing all systems implementation, product selection and migration, disaster recovery planning and process excellence initiatives. Chuck joined

Doc.It in 2006, and has personally assisted over 150 firms with document management

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