

Workflow: The Value Proposition

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What is the value proposition for workflow applications? Why should an organizational leader or businessperson seriously consider workflow? In answering this question we will consider only general characteristics rather than the features or advantages of any particular application.

When a workflow system is designed and built by experienced specialists, with good cooperation and support from the people affected and involved, it is almost guaranteed to be an organizational and financial success. This assertion sounds too good to be true, but it is in fact based on sound logic:

Recognized Need

A workflow application is usually brought in to address a major need in an organization. In other words, it is not a general software upgrade, a new policy, an experiment, or a pet project.

- The need is usually well understood, at least by major stakeholders, and typically among the rank and file.
- The cost of not finding a solution is already likely to be estimated as higher than that of creating the solution.

Targeting Specific Problem Areas

Workflow specifically *targets* areas in the business where there is:

- Information that isn't adequately shared. □ Time and deadline slippage.
- Confusion or inefficiencies in assigning work and personnel.
- Computer/software tools and resources which are not as available or as useful as they could be.
- Difficulty monitoring or managing activities and processes.
- Work that "slips through the cracks."
- A problem getting a process to run end-to-end, smoothly, successfully and without "dropouts."

Lightweight Solution

Workflow offers a relatively "light" solution to these problems:

- It can be built using a wide variety of software platforms and tools, including rapid application development (RAD) packages, or even on top of popular platforms such as Microsoft *SharePoint*, which provides many of the features and capabilities "out of the box" at a very reasonable cost.
- Basic workflow software is very simple conceptually and easy to program. "It's not rocket science."

- Basic workflow software is really a thin layer of functionality that runs through and touches on various work and processes going on in a business.
- The goal of workflow design is to add *the minimum amount of structure that will give the biggest gain in efficiency*.
- Because of its underlying simplicity, workflow is low risk. This is not to say that the entire system won't involve some challenges, but in most cases route to completion is well understood from the beginning.

Selectively Applied

Workflow is not applied to areas where there is no significant advantage:

- Anything already working well is not rebuilt (though it may be tied in to the new system).
- Difficult features and sub-projects with only a small anticipated benefit are avoided.

Serious Problems Solved

Workflow provides an opportunity to improve user experiences and solve serious, nagging problems:

- When a system is designed there are often a number of other concerns, problems, and annoyances that surface.
- Many of these issues turn out to be easy to fix or improve.
- Others at least come to the light of day, where decisions can be made and priorities set.
- The reexamination of the end user experiences as well as those of the managers, data center, and IT personnel, may bring unanticipated benefit to the organization.

Benefits

What are some of the benefits of Workflow?

- Processes become more efficient and less labor intensive.
- The business runs more smoothly.
- For a manager, it is easier to *monitor*, *track*, and *tune* the business processes.
 - Monitor: You have an overview of everything going on. You can examine the status of all tasks and sub-tasks.
 - Track: You have a complete history and audit trail of all tasks and sub-tasks that go through your process.
 - Tune: You can dynamically adjust the process where needed: shortening and lengthening time-allotments, shifting and reassigning personnel, etc.
- Information is shared and passed along as it needs to be.
- Knowledge and expertise in the organization are fully exploited.

- Communications are improved, both internally and externally.
- Confusion about who is doing what and the status of activities is dramatically reduced.
- Errors and inaccuracies are reduced.
- It is possible to move toward “paperless” operations.
- It is often possible to get an immediate benefit just in terms of eliminating wasteful and unnecessary spending.
- Running calculations and computations are kept current automatically.
- Data are retained through all stages, eliminating redundant and tedious entry and calculations which are prone to errors.
- Customer/client satisfaction and retention are improved.
- Overall operating costs are reduced, and profitability is improved.
- The work environment becomes more organized and less hectic.
- The business process becomes much more scalable. There is a framework for expansion of the business, bringing in additional workers, training, and expanding activities into new areas.

Sample Results

Here are some examples of the benefits we have seen with Workflow.

- A company doing complex real estate transactions and development was able to increase its in-process customer retention by 200-300%.
- An investment company that prepares multiple quarterly reports was able to reduce the staff deployed on the reports from 60 to 20, and the time required from 4 weeks to 2. At the same time, the accuracy and timeliness of the reports were improved.
- A manufacturing company that weekly processes dozens of bids in multiple sales channels, each bid containing up to six hundred line items, was able to expedite the profit margin analysis and management review cycle – resulting in more accepted bids and improved margins.
- A large company was able to hire an all new service department, and have them up and running in a few weeks, providing a new benchmark of customer service.

Among software projects, custom workflow solutions are by far among the most successful. Not all software projects turn out to be winners – for a wide variety of reasons. The goal was too ambitious, the software chosen didn’t fit the real needs, the difficulty and costs greatly exceeded original estimates, and so on. However, in the author’s experience, starting in the early 1990’s, with dozens of custom workflow projects of varying sizes and scopes, they were always successful. They accomplished what they set out to do, and stayed within time and budget constraints.

Customers/clients were consistently pleased, if not delighted, with the results – both management and the end users.