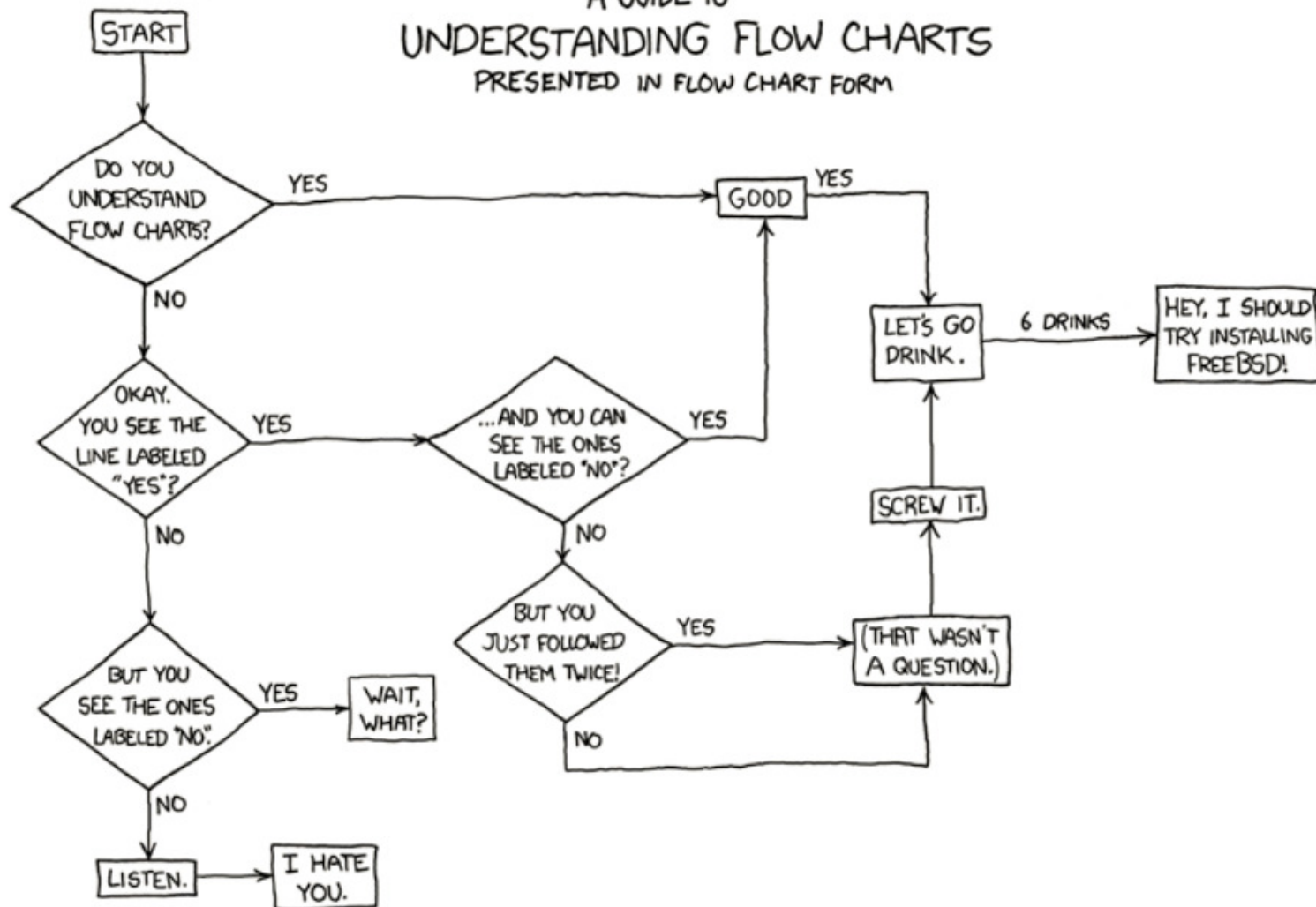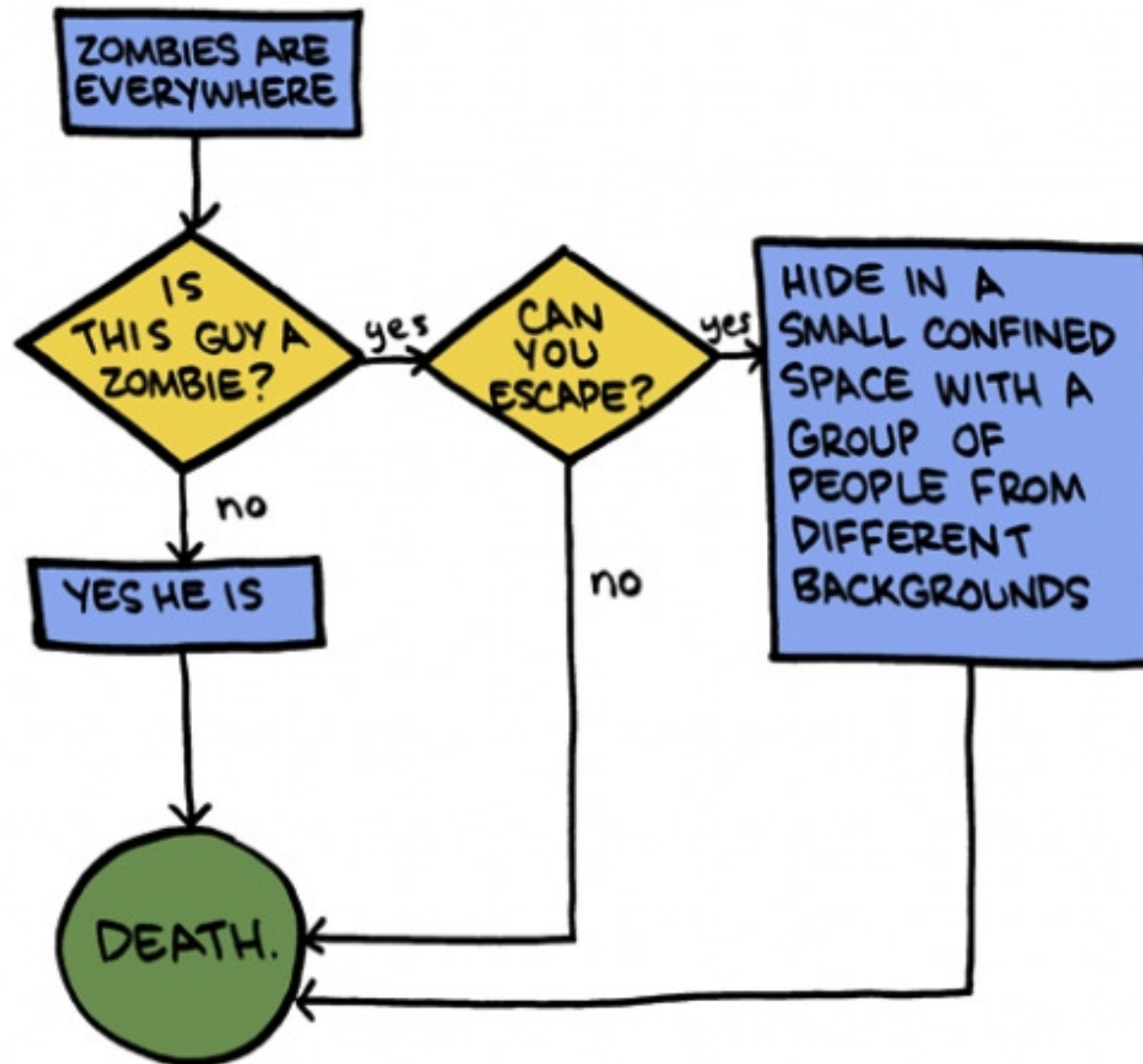# Zen and the Art of Workflows

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A GUIDE TO
UNDERSTANDING FLOW CHARTS
PRESENTED IN FLOW CHART FORM

http://thezombieapocalypse.com/post/2350227895/zombie-flow-chart

Why use workflows?

- Sharpens ability for you and team to think through everything: sequences of tasks, set priorities, provide clarity, ability to share with others

- Great way to build the team

- Helps to streamline and align the work

- Can quickly ID:
  - Things that are missing
  - Points of connections that need to be made
  - Things that still need a decision

Let's make a peanut butter sandwich!

You can create workflows in many ways:

- A drawing on a napkin or paper
- Using post-it's on a wall or board
- Using a written outline, with bullets
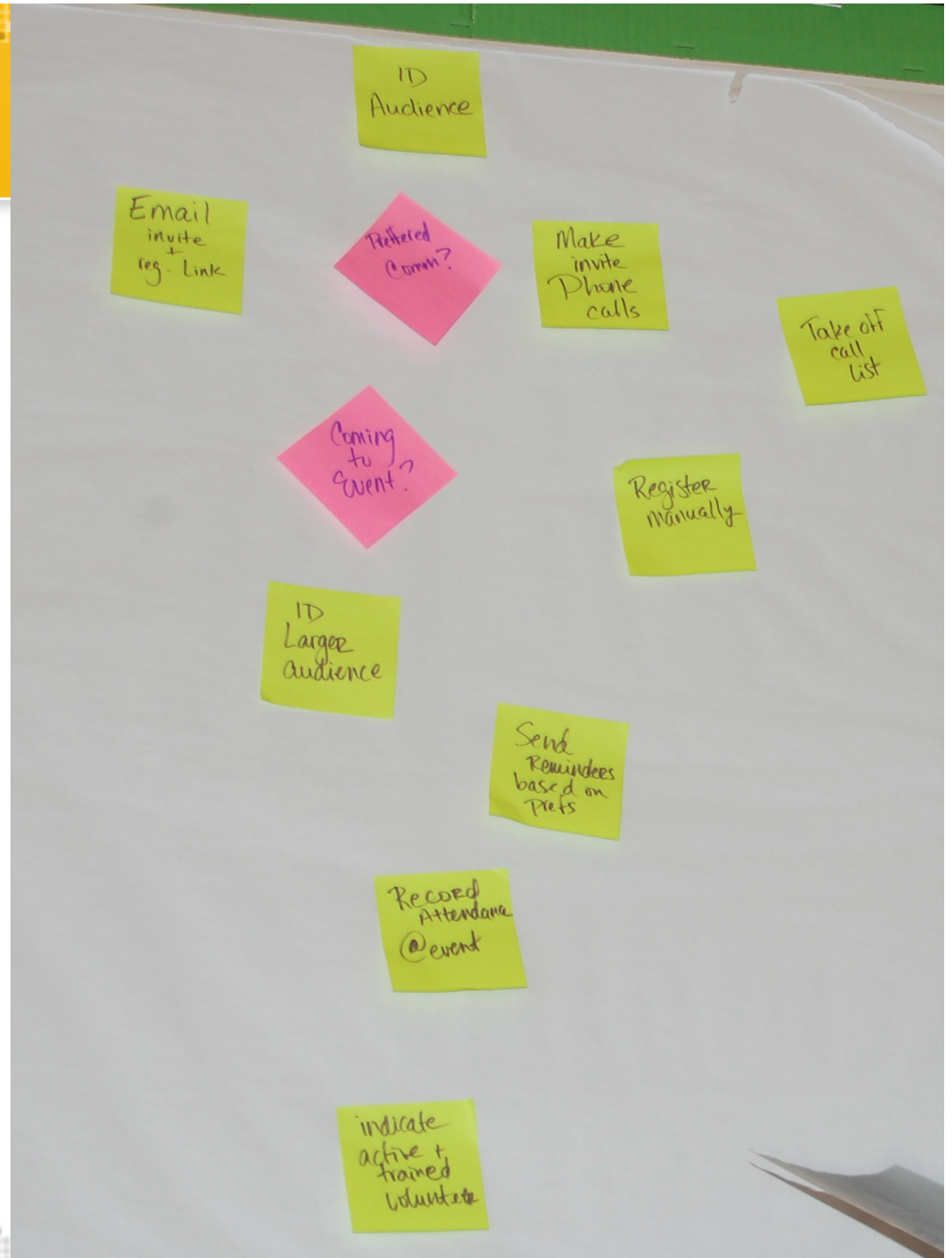- Combination of visual and narrative

Brainstorm Example with post-its:
- ID the steps (yellow squares)
- Order steps in your timeline
- ID Decision points (pink diamonds)

Steps to creating a Workflow Map

1. Choose a process you want to improve such as campaign, project, or activity, e.g. how do you develop leaders, or turn out members to an event?

2. Articulate the goals or objectives of that campaign, project, or activity.

3. Ask 'how do we do this work?' and identify the steps in the process by using rectangles for each step – Don't worry about the sequence at this point. [you can write on post-its and move around later] – keep it broad for now, don't get stuck in the details – you want to see it as a WHOLE process.

    HINT: Only map how you CURRENTLY do this work…the analysis comes later.

Steps to creating a Workflow Map

4. Once you've identified the steps, now put them in sequential order.

5. Step back and look for where there needs to be decision points using diamond shapes. Then fill in more steps or activities as needed.

6. Refine again, and start adding in the 'flow' of the process by drawing arrows.

7. Make sure you add your inputs (information need to collect) and outputs (information to report / outcome) using oval shapes: what information comes into the process and what information comes out at the end of the process. Are there points in your process where you need more information?

Reworking or Analyzing your Workflow

Take even a few more steps back and ask the group:

- Does the work still meet the intended goals?

- Are there any bottlenecks

- Do you see any duplication of work

- Do the decision points make sense? Who makes the decisions?

- Are you doing the right things in the right order?

- Are you doing the right activities in this process? Do others need to get involved?

- Are you capturing information at the points you need them? Are you capturing the right kinds of information?

- Who are responsible for the activities? Are they the right people?

- Does the information you get at the end of the process answer the questions you're trying to understand from the goals of or your work?

Workflow Takeaways:

- It's always best to start with Goals
- Start with brainstorming rather than be too precise
- Best if it's a participatory exercise
- Can be simple or complex
- Can be a visual, a narrative, or mixture
- Allows you to be nimble & quick
- Remember: it's a working process!