

IMPROVE YOUR WORKFLOW: Process Review Worksheet

Name of Process	Staff Name(s)	When Process Happens	When Process Repeats	Key
				⓪ Opportunities ☆ Tips & Tricks

Step	Description Each step, incl making decisions, waiting	Responsible Person/People	Resources Needed Form, car, computer, phone, files, etc.	Time Minutes	Comments Label ⓪ and ☆ as you go
1		<input type="checkbox"/> Client <input type="checkbox"/> Home Visitor <input type="checkbox"/> Supervisor/Mgr			
2		<input type="checkbox"/> Client <input type="checkbox"/> Home Visitor <input type="checkbox"/> Supervisor/Mgr			
3		<input type="checkbox"/> Client <input type="checkbox"/> Home Visitor <input type="checkbox"/> Supervisor/Mgr			
4		<input type="checkbox"/> Client <input type="checkbox"/> Home Visitor <input type="checkbox"/> Supervisor/Mgr			
5		<input type="checkbox"/> Client <input type="checkbox"/> Home Visitor <input type="checkbox"/> Supervisor/Mgr			
6		<input type="checkbox"/> Client <input type="checkbox"/> Home Visitor <input type="checkbox"/> Supervisor/Mgr			
7		<input type="checkbox"/> Client <input type="checkbox"/> Home Visitor <input type="checkbox"/> Supervisor/Mgr			
8		<input type="checkbox"/> Client <input type="checkbox"/> Home Visitor <input type="checkbox"/> Supervisor/Mgr			
9		<input type="checkbox"/> Client <input type="checkbox"/> Home Visitor <input type="checkbox"/> Supervisor/Mgr			
10		<input type="checkbox"/> Client <input type="checkbox"/> Home Visitor <input type="checkbox"/> Supervisor/Mgr			

General Questions	① Opportunities		
<ul style="list-style-type: none"> • Take me through the process of _____. <ul style="list-style-type: none"> ○ What does that look like? ○ How do you decide when to do this? ○ Go through each step, including decision making steps (like who to contact). Note: <ul style="list-style-type: none"> ▪ Waiting is a step ▪ Holding information in your brain is a step • For each step <ul style="list-style-type: none"> ○ <i>Who</i> is responsible? ○ <i>What</i> resources do you use? <ul style="list-style-type: none"> ▪ <i>How</i> do you get them? <ul style="list-style-type: none"> ○ Does that involve walking/clicking? ▪ <i>How long</i> does each step usually take you? • How many hours per week do you spend doing this process? <ul style="list-style-type: none"> ○ Where are there opportunities to make decisions once and not have to keep making them? ○ Where are there opportunities to minimize time, waiting, energy or brain space? Or to make the Best Time? 	B	<p>Bonus Bonus time/energy spent doing something incorrectly and inspecting or fixing errors—better right the first time!</p>	
		E	<p>Enough Do enough—not so much that it takes away from your well-being or other clients. Doing more than what is needed or doing it sooner than needed can chip away at your time.</p>
			S
		T	
★ Tips/Tricks	<i>How can you maximize your Best Time?</i>		
<ul style="list-style-type: none"> • What are your tips/tricks for this process? • What modes of communication work best? • Do you organize ____ in a particular way? • Do you alter your process based on client demographics/culture? • What would make it faster to do this process? • What would make it easier to do this process? <ul style="list-style-type: none"> ○ What could simplify the paperwork? Database? • What could your supervisor do that would be helpful for the process? 	T	<p>Transportation Are you unnecessarily moving items, clients or staff? This becomes evident when the physical workspace doesn't facilitate a process, or when staff travel is widely dispersed.</p>	
		I	<p>Inventory Does this need to be on hand, or is it cluttering the workspace/flow? What do you need to keep on hand (copies, tools, supplies), and what could be moved out?</p>
	M		<p>Motion Do staff move from room to room, floor to floor and building to building more than necessary? Or does it take 6 extra clicks and a bunch of scrolling to find that file?</p>
		E	<p>Extra Work performed that is not of value, like extra data that's not used, or collecting more details than necessary.</p>