





## IMPROVE YOUR WORKFLOW: Eight Opportunities

**Purpose:** A tool adapted from the Lean Management System to help you *make the best of your time*. Add your notes in the third column!

More emPower Tools  
+ learn more about each topic  
[thecapacitycollective.org/resources](http://thecapacitycollective.org/resources)

	Definition	Suggestions	Observations/Ideas
<b>B</b> Bonus	<p>Be careful of giving “bonus” or extra time and energy doing a task over or fixing errors! Your time is best used doing it right the first time!</p> <p><i>Example: You have to enter information from a form twice because it was not correct the first time. How could you check your steps as you go so you do not have to do it over again later?</i></p>	<ul style="list-style-type: none"> <li>Set up processes and workspaces in a way that sets up staff for success when it comes to data entry.</li> <li>See these emPower Tools for more info:                             <ul style="list-style-type: none"> <li><a href="#">Improve Your Workflow: Organize Workspaces with the 5S System</a></li> <li><a href="#">Improve Your Workflow: Conduct a Process Review</a></li> <li><a href="#">Improve Your Workflow: Organize Electronic Workspaces</a></li> <li><a href="#">Collect Meaningful Data: Review and Improve Your Forms</a></li> </ul> </li> </ul>	
<b>E</b> Enough	<p>Do enough with a client—just 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 use up your time and bandwidth.</p> <p><i>Example: Home visitors care about their clients, so run errands for them beyond program scope, reducing time for other clients. How can they focus only on tasks within the program scope, so all clients get served?</i></p>	<ul style="list-style-type: none"> <li>Be clear about expectations—what is enough, and where is outside the boundaries? What should staff do if they have any questions about boundaries?</li> <li>Have resources (like info for other providers) to share when clients ask for help outside of program scope.</li> <li>See the <a href="#">Create a Data Culture: Engage Your Staff</a> emPower Tool for suggestions on maintaining a culture where staff feel they can bring up concerns.</li> </ul>	
<b>S</b> Stops	<p>What are the stops or pauses in your processes? Time spent waiting for the next event, person or work activity can eat up time and resources for clients and staff and requires you to keep track of too much.</p> <p><i>Example: A staff member is not able to schedule their first visit with a family because they are waiting for insurance or demographic information. Can you change the order of steps to avoid waiting?</i></p>	<ul style="list-style-type: none"> <li>Complete a Process Review for processes that have pain points (things take too long or feel repetitive or clunky).</li> <li>Identify stops—pauses, barriers or periods of waiting that are built into the process.</li> <li>Strategize ways to minimize the time spent waiting for information or other people.</li> <li>See the <a href="#">Improve Your Workflow: Conduct a Process Review</a> emPower Tool for more info on reviewing processes.</li> </ul>	
<b>T</b> Talent	<p>What are the talents and skills among your staff that aren't being utilized yet? Make the most of human potential with employees who are engaged, heard, supported and encouraged to share their ideas.</p> <p><i>Example: Staff notices an issue with a form but does not say anything because “nothing will happen anyway”, or “mgrs. don't want to hear problems.”</i></p>	<ul style="list-style-type: none"> <li>Cultivate a culture where ideas are welcomed and encouraged. Build feedback loops into processes.</li> <li>Have a designated day and/or time where all home visitors meet and share ideas together.</li> <li>See the <a href="#">Create a Data Culture: Engage Your Staff</a> emPower Tool for suggestions on cultivating a process improvement culture.</li> </ul>	

## T Transportation

### Definition

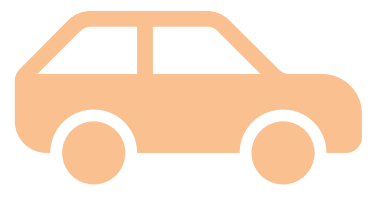
Are you unnecessarily moving items, clients or staff? This becomes evident when the physical workspace makes a process difficult, or when staff have to travel long distances several times a day.

*Example: Staff drives from client A's house in North Seattle, back to the office in South Seattle, and then to client B's house in West Seattle. How could the home visitor spend less time driving to free up more time for clients?*

### Suggestions

- When possible, divide caseloads by geographic area, with one visitor per area, or funnel clients into a schedule based on area (West Seattle on Tuesdays).
- Where possible, consider expanding visits into earlier mornings or evenings to avoid rush hour traffic.
- Could your home visitors use public transportation to get to their visits even faster than waiting in traffic?
- Organize processes and materials so home visitors can complete several visits a day without returning to the office.

### Observations/Ideas



## I Inventory

Does a given office item need to be on hand, or is it cluttering the workspace/flow? What do you really need to keep stocked and accessible (copies, tools, supplies), and what could be moved out?

*Example: 100 copies of an assessment are printed and stored on a shelf for a year. The assessment changes in 6 months, and the older version destroyed. How could space and resources be better used?*

- Complete a Process Review with everyone who touches a process, and make decisions: what do we *really* need to have on hand to easily and smoothly complete these processes?
- Organize resources according to how often you need to access them.
- See the [Improve Your Workflow: Organize Workspaces with the 5S System](#) for more ideas.



## M Motion

Do employees move from room to room, floor to floor and building to building more than necessary? Does it take 6 mouse clicks and a bunch of scrolling to find an electronic file?

*Example: To get materials for a home visit, staff have to print from their cubicles, walk downstairs to get the copies off the printer, go to another room for paper to reload the printer. Could the office be more efficient?*

- Keep physical and electronic workspaces organized in a way that streamlines work for your staff. Remember to set yourself up for success!
- See the [Improve Your Workflow: Organize Workspaces with the 5S System](#) for more information on organizing your physical workspace.
- See the [Improve Your Workflow: Organize Electronic Workspaces](#) for more information.



## E Extra

"Extra" is any work performed that doesn't have value, such as extra data that's part of the data entry process, but is not actually used, or more details collected than are useful.

*Example: A form asks for some data that is no longer used. The same referral information is collected on two forms, so time is spent filling out same info twice.*

- Conduct a Data Review and review your forms yearly (see [Collect Meaningful Data: Conduct a Data Review emPower Tool](#)).
- Take a hard look: what data do we NEED to be collecting, and how often, to have the data required by funders, and our program needs? Update forms and training as needed.
- **Note: with many changes, it takes time to see the impact! Stick with it.**



*We encourage you to share these resources with your organization, and other local social service organizations. PLEASE NOTE: this handout is the intellectual property of The Capacity Collective. Please do not duplicate parts, or adapt, without the express permission of The Capacity Collective. Thank you for supporting our work!*