

## IMPROVE YOUR WORKFLOW: Define & Document Processes

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**Purpose:** The first step to improving a process is to define and document the process. This is best done with the team, so everyone can share how they complete a process, and to get team buy in. These defined processes will then serve as a baseline from which to improve those processes. In this tool, we provide the steps for defining and document a process you would like to improve.

### Why is it important to standardize a process?

If there is no established process, it is difficult to (1) consistently do the process the most effective way possible and (2) identify the issues in the process in order to improve it. A consistent process is needed to clarify what is working well and what could be improved. **If you can't find the issue, you can't fix the issue.**

Even if it's not perfect, a **process should be defined or standardized**. This defined process is never a final document, but instead, a baseline that is always be a work in progress. The image below illustrates this concept:



### How to standardize processes

#### I. Set the groundwork

Have a plan	Determine what processes are most relevant	Start small	Start now
<ul style="list-style-type: none"> <li>Designate who will make process templates</li> <li>Explain why it is important to the team</li> <li>Make sure everyone feels they can point out issues and suggestions</li> </ul>	<ul style="list-style-type: none"> <li>Consider the tasks that are used most frequently</li> <li>Consider the tasks that most often seem to have issues or inconsistencies</li> </ul>	<ul style="list-style-type: none"> <li>Start with adjustments that feel doable. Your team has to get used to using defined processes. You want the first try to be successful!</li> <li>Define processes one at a time, if that's what feels possible.</li> </ul>	<ul style="list-style-type: none"> <li>Don't wait until the process is perfect to define it with a template. The idea is to define it first as a baseline, and make improvements to that baseline!</li> </ul>

#### II. Take note of the current process

You can use the **Improve Your Workflow: Process Review Worksheet** to methodically observe the process you would like to review. If you choose to not use the worksheet, consider including the following in your process observation:

- Process overview:** name of process, when it is completed, and when it is repeated.
- Description** of each step in the process (include waiting and decisions made).
- Person/people responsible** for each step of the process.
- Resources** needed for a step, including forms, computers, files, materials, etc.
- Time** a step takes, including wait time.

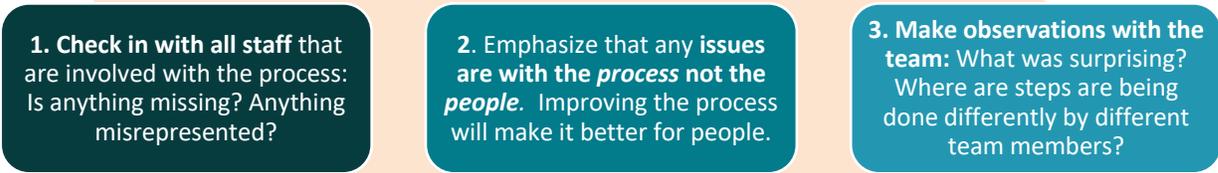
For another type of process observation, you can assign a team member as the client in a process (such as intake). Then describe each step of the process by noting the information listed above on sticky notes. Place the notes on the person representing the process as you discuss each step. At the end, you will have a visual representation of the process on the staff member.



IMPROVE YOUR WORKFLOW: Process Review Worksheet

Name of Process	Staff Name(s)	When Process Happens	When Process Repeats	Key	
				Ⓞ 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 Ⓞ 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			

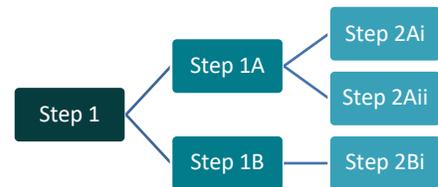
### III. Review with team



### IV. Create a process template for defined work

#### Tips for the template

- ✓ Keep it to 1 page
- ✓ Use charts and visuals
  - Charts: flow charts are a great option. Flow charts also allow branches, in case there is more than one way to do the process depending on the situation.
  - Visuals: may include pictures of a work area and where to find a needed tool
- ✓ Make sure to clearly (1) number, and (2) label the steps. Steps should be easy to follow, even if you don't have previous knowledge



#### After making the template

- ✓ Make sure the template is accessible to all
- ✓ Check in with staff (face-to-face if possible!)—is there anything that was missed? Any improvements or clarity needed?
- ✓ Communicate to staff that new ideas are welcomed! Encourage staff to look for opportunities for improvement (see the *Improve Your Workflow: Eight Opportunities* emPower Tool).

### V. Continuous Improvement



Identifying an opportunity for improvement is good! But how do you most effectively turn a *problem* into a sustainable *solution*?

The **Systematic Problem-Solving** model can help guide the process.

Make sure to **finish Step 7 and standardize the new process with a template.** This template is your new baseline, which you can continue to improve over time.