Organizational workflow evaluation

Does your organization need a true workflow platform?

Answer these six questions, tally your score and find out.
Organizations are continually looking for efficiencies – but is there a blind spot when it comes to Workflow Optimization?

Research has shown that businesses can get lulled into a sense of security with the status quo when it comes to their current workflow system, thinking that it’s “good enough for right now.” And many will continue to practice the same inefficiencies that cost them time and money year after year. The following evaluation is designed to add new light to the subject of workflow effectiveness and how you perceive your company’s current solution.

Take a few minutes – answer honestly – tally your score.
1. Project visibility

If you have issues in determining where work is or who is responsible for what task during the process of completing a project, you have visibility issues. On a day-to-day level, visibility challenges result in outcomes ranging from higher than normal anxiety to missing deadlines and costing the business dollars.

How would you rate your team’s ability to identify job progress at any given moment?
(Mark the numbered circle that most represents your organization. Please check only one circle.)

1. Great!
   They can see exactly where everything is by the time they have their morning coffee.

2. We’re doing OK.
   They have a good sense of where projects are in relation to budget and schedule.

3. Visibility is low.
   They only know where jobs are through emails, reports and when projects are completed.
2. Implementing change on-the-fly

This is a question of departmental flexibility and control. The main issue here is that when you have a workflow bottleneck, do you have the ability to change the process then and there to create efficiencies? Many times, the answer is that the process improvements have to wait until a more conducive time of year.

How would you rate your organization’s ability to affect current workflow processes?
(Mark the numbered circle that most represents your organization. Please check only one circle.)

1. Totally flexible!
   When we see an issue, we can make a change and gain efficiency.

2. Slow to move.
   We usually have to wait for a better time to go back and change the process.

3. We’re stuck.
   We experience the same issues over and over – implementing change is difficult for us.
3. Standardization and automation

These two factors (standardization & automation) of processes ensure accuracy and improve efficiency. If you are currently using job jackets or an excel spreadsheet (or a home grown solution) where it is up to the individual how a task is completed and moved, then you can benefit from a solution that ensures accountability.

How would you rate your team’s level of accountability for task completion, schedule management and budget adherence?
(Mark the numbered circle that most represents your organization. Please check only one circle.)

1. Fully automated. Our processes are standardized and we run a really tight ship.
2. Moving in the right direction We have some controls in place, but would like to have more oversight.
3. Old school. It’s like the wild west in here, everyone is running their own process.
4. Efficiency and productivity

Each organization is different in the way they complete tasks, meet deadlines and forecast resources, but if you have to continually adjust because your team is less efficient than need be, you should know that it doesn’t have to continue. Many efficiency questions can be solved through implementing new technology.

How would you rate your overall organization’s productivity?
(Mark the numbered circle that most represents your organization. Please check only one circle.)

Very strong. We are running at peak performance.

Pretty good. We are a hard-working and productive group, but there can be improvement.

We can do much better. We could benefit from an overhaul of the process to make us better corporate stewards.
5. Analysis and review

Documenting the current workflow process is an important step in managing change in an organization’s workflow process. The most important factor is being able to learn as you grow – ask this question: Are we repeating the same mistakes or do we face the same challenges year after year?

How would you rate your business’ ability to benefit from the review process?

(Mark the numbered circle that most represents your organization. Please check only one circle.)

Highly analytical. We are a learning organization – analysis is built into our process.

We’re learning. Our ability to review and analyze the process is limited and we see opportunity here.

Repeating inefficiencies. We rarely get to go through process redesign efforts to learn from past challenges.
6. Green initiatives

Many companies have green initiatives, but some fall short of implementation and organizational buy-in because they lack a bottom-line benefit. Going to a “less-paper” approach through a workflow solution can reduce corporate paper consumption by as much as 30% and also reduces the anxiety of going full-on paperless.

How would you rate the level of importance your organization puts on going paperless?
(Mark the numbered circle that most represents your organization. Please check only one circle.)

1. Making it happen.
A high level and I’m leading the charge / we are a virtual office.

2. Enviro friendly.
We have a corporate mandate, but we’re not there yet.

3. Not so good.
We have stacks and stacks of binders as far as the eye can see.
Tally your score.

That’s it – you’re finished! Mark your scores from each section by writing the corresponding number to your answer and add them up to get your total. Then see where your organization falls in the spectrum of Workflow Optimization.

Q1: Project visibility
Q2: Implementing change on-the-fly
Q3: Standardization and automation
Q4: Efficiency and productivity
Q5: Analysis and review
Q6: Green initiatives
Total:

Scores totaling 6 - 12...
You are an exceedingly effective organization in terms of workflow. If you are interested in finding out what XCM™ has to offer, we would be happy to discuss how you can continue to optimize your efforts.

Scores totaling 13 - 20...
You may be able to benefit from a workflow solution that offers more visibility and control for your organization. Being more flexible and having the ability to empower employees and enact change could lead you to even greater productivity.

Scores totaling 21 - 30...
Your company may be losing time and money due to process inefficiencies. A workflow platform that offers visibility and control may help you manage projects more effectively and, in turn, help your business perform better.
Closing thought...

If you used the checklist and have determined that a true workflow platform can help your organization become more productive, we encourage you to find out more about XCM™ Corporate Solutions. Our approach to workflow focuses on 4 key directives that can contribute to a more productive environment, whether it's within or across departments.

Give one of our Workflow Consultants a call and take a few minutes to discuss your business needs and objectives.

Contact an XCM Workflow Consultant for more information: 781-356-5152
XCM™ Corporate Solutions is a division of XCM™ Solutions, the world’s leading accounting and finance workflow platform. XCM Corporate Solutions works with your existing technology systems to coordinate tasks between people and departments, with the ultimate goal of improving organizational efficiency in a paperless environment.

Visit www.xcmcorporate.com or call 781-356-5152 for more information.