Building your workflows – Part 1

How do you build a workflow?

There are three important questions that we need to ask ourselves when we start the mission of 'building a workflow':

1. What are the workflows that I am being ask to document?
2. What is the information I need to know in order to put this down on paper?
3. HOW do I document it? Words, pictures, diagrams, video?

NOTE: This is a basic 'building blocks' course on how to build your CURRENT workflows and processes. Once done, we can begin analysing the CURRENT workflows for areas of improvement….which will lead us to building more effective FUTURE workflows. (See Course Outline: Lean Workflows – identifying waste to build a more effective workflow).

This course is targeted at all employees or supervisors who oversee operations within a brokerage firm, although collaboration from all team members may be required. The workflows addressed can be for Personal, Commercial, even administrative (i.e. Accounting) workflows. The skills and methods are transferrable!

Course plan: Building your workflows

General information:

- **Title of this activity:** Building your workflows
- **Length:** 2 hours (static online course, webinar) or 3 hours (onsite)
- **Number of participants:** N/A
- **Targeted clientele:** Anybody who plays any role in a company and who wants to better understand how work moves and flows throughout the office.
- **Training material:** All of the participants will receive a training manual. The facilitator will use a Power Point presentation as a visual support.
- **Learning strategies:** This course is deployed as an interactive lecture, with several group discussions. The participative style of presentation is very important with these types of sessions in order to fully implicate all of the participants in the learning process.

Main objective:

The main objective of this course is to give concrete tools and methods to facilitate the creation of a workflow document.

Specific objectives:

At the end of this session, the participant will be able to:

- Identify the scope of the workflow to be documented (which workflow, who is to be involved)
- Determine the information that is to be included in the documentation (steps, tools used, systems involved)
- Determine the best method of documenting the workflows in question

Requirements

An understanding of the day-to-day roles and responsibilities of the various team members within a brokerage firm, as well as a minimal amount of technical knowledge about the insurance industry.

Program

✓ Chapter #1 – Identifying which workflow to be documented

- Outlining the current structure of the company
- What are the situations that occur that cause the most stress and chaos?
- What happens during the peak periods of work?
- Identifying the high-level roles and responsibilities of team members
    - Who is involved in the day-to-day work as it moves through the office?

✓ Chapter #2 – the tools we use every day

- Inventory of current model:
    - Systems – BMS, Commercial Policy Management System, quoting tool, document management, voice recording, Microsoft Office, portals
    - Filing method – paper files, in-boxes, t-filing, electronic filing

✓ Chapter #3 – workflow models

- Different workflow models
    - The written word
        - User guides
            - screen shots
            - hyper links
    - Workflow-diagrams
        - Data flow diagrams, Value-Stream mapping
            - Visio model
            - draw.io
    - Pros and cons of both models

✓ Chapter #4 – the build (generic)

- Version 1 – using Word with screen shots and hyper links
- Version 2 – using Visio