Building your workflows – Part 2

So you've built a workflow – now let's REALLY look at it!

In order to create a more effective workflow, it is important to analyse the CURRENT workflow so that we may:

A. Identify those steps which are VALUE ADDED vs. NON-VALUE ADDED steps
B. Identify areas of WASTE in the workflow
C. Identify how the workflow can be rebuilt to REDUCE WASTE, REDUCE NON-VALUE ADDED Steps and DRIVE VALUE to the customer

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 – Part 2

General information:

- **Title of this activity:** Building your workflows – Part 2
- **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 identify areas of opportunity that can lead to the creation of more effective workflows and ultimately improve the customer experience.

Specific objectives:

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

- Identify Value added vs Non-Value added steps in a workflow
- Understand the '7 Deadly Wastes of Insurance' and identify them within their current workflow environment
- Understand the concept of reducing or eliminating waste in a workflow while driving customer value

Requirements

The participants should first take the GSI course 'Building your workflows – Part 1' and bring with them copies of any workflow created during that course.

Program

✓ Chapter #1 – value-added vs. non-value added steps

- What does the concept of value-added mean to the customer?
- How do I tell the difference?
- Non-value-added steps – why are they even there?

✓ Chapter #2 – the Seven Deadly Wastes of Insurance

- Concept of waste in a workflow
- Discussion on the Seven Deadly Wastes
    - Identifiers
    - Underlying causes
    - Impact if that waste is not reduced or eliminated

✓ Chapter #3 – finding waste in our workflow

- Each participant will have a few minutes to identify areas of waste in the workflow that was created in Part 1 of our course. We will then go through the workflow to see how everyone did.

✓ Chapter #4 – Eliminating or reducing waste in our workflow

- Which ones are within our control to manage?
- How do we deal with those that our beyond our control?