Creating a workflow

Where to start with creating your workflow.

1. Write out step by step what you are currently doing for what you want to automate. For example, you might want to automate your Lead Generation Process.

EXAMPLE SCENARIO

Current scenario might be an email or phone call you receive from someone that is interested to find out more about your business and is interested in learning more about your services. You reply 2 days later because you were busy with other things and sent 5 more emails back and forth addressing the information the customer was looking for. Finally, you both decide it would be worthwhile to schedule a meeting so you can discuss this in-depth. Further emails back and forth to find a suitable time for both your calendars. After the meeting, you write up a contract for this new client and then sent it off. Five days later the client still hasn't signed the contract, so you email them back to follow up. They had forgotten to action it, so you finally get the signed contract. After this you create an invoice and so on and on it goes.

STEP BY STEP SCENARIO

A. Customer asks for information (via email or phone)
B. You send them information about your services (a side note that some of this information is already on the website)
C. You both schedule a time to meet for a discussion so the customer can make a decision
D. You send a contract to the customer
E. Customer signs the contract (sometimes you have to send a follow up)
F. Once the customer signs, you create an invoice
G. etc

2. Map the steps you have written to one of the 3 options available [To Do, Action or Pause] in the Worfklow and look for gaps that can be improved through 17Hats

For example:

Current Scenario	17Hats Option
Customer asks for information (via email or phone)	[GAP FOR IMPROVEMENT] *It would be good to identify how the customer found out your phone or email to make contact with you.* This can address if the information they are after can be put online on your website or social media pages. Consider putting a Lead Capture Form for this as a Contact Us Form so you can automate this process.
You send them information about your services (a side note that some of this information is already on the website)	[MAPPED TO AN ACTION] Set this up as an automated email that goes out with a PDF or a link to where you list out your services fully. You can also link it to an FAQ section
You both schedule a time to meet for a discussion so the customer can make a decision	[MAPPED TO AN ACTION] You can include the link to your calendar that enables the customer to schedule a time with you. You can include this information as part of the email in the previous step.
Inserted step	[GAP FOR IMPROVEMENT, MAP TO A TO DO] You write notes regarding your meeting OR you file a recording of your meeting in the client's record.
You send a quote to the customer	[MAPPED TO AN ACTION] A quote is sent to the customer. This step sends the Quote, Contract and an Invoice in one step.

Decide on what you want to *approve* first or *send automatically*.

I recommend that you set things to APPROVE first before you send automatically to be sure you are comfortable with your workflow.

Test your workflow

Always test your workflow first to make sure it works fully to what you want.