

# **WORKSHEET**

## **The Efficiency Webinar: Preparing to Create Your Own Workflows**

### **PRACTICE ASSESSMENT:**

**What is not currently working in your practice?**

**What IS currently working in your practice?**

**What technology solutions do you currently have that are working well?**

**What technology solutions are not working well?**

**What technology solutions are on your wish list? (List in order of priority.)**

**Does your current CRM have the ability to program workflows in it? If so, in what format (linear, branched, by role)?**

**What, if any, workflows have you already created?**

**What workflow steps might you be able to automate with technology?**

## **LOGISTICS:**

**Where will your master copy of your workflow system be centrally stored?**

**How will those using the workflows on a daily basis be able to access the workflow system? Will you create permission levels?**

**How will updates to the Workflow System be handled?**

## **DEFINING ROLES AND PEOPLE:**

**Who will be Project Manager?**

**Who will be Chief Technology Officer?**

**Who will be in charge of writing the final version of the workflows?**

**Who will enter the workflows into your CRM?**

**Who will test each workflow to make sure it works?**

**Who will help those having difficulties?**

**Who will be in charge of the office calendar to make sure project time is blocked off and respected?**

**Who will be in charge of milestones and rewards?**

**Which team members will be using the workflow system?**

**Who will fill administrative role(s)?**

**Who will fill associate advisor role(s)?**

**Who will fill lead advisor role(s)?**

**Other roles that need to be filled:**

## **SERVICE PATHWAYS**

**What specific services do you offer?**

**Begin to create a high level view of your service pathways. (Suggested tools to use are PostIt Notes, large easel paper with sticky back or mind mapping software such as Mindjet.)**

**TEAM SKILL SET ASSESSMENTS:**

**Work Values**

[www.123test.com/work-values-test/](http://www.123test.com/work-values-test/)

**Personality**

[www.123test.com/personality-test/](http://www.123test.com/personality-test/)

**Team Roles**

[www.123test.com/team-roles-test/](http://www.123test.com/team-roles-test/)

**DISC**

[www.discprofile.com/disc-recruiting-hiring.htm](http://www.discprofile.com/disc-recruiting-hiring.htm)