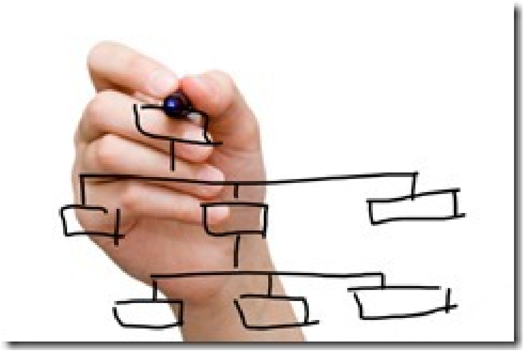
The Secret to Good Task Management is Effective Workflow

At Pacific Crest Group we are all about implementing work systems and finding ways to measure the results. One of the largest challenges we run into with clients is creating systems that promote collaborative processes. Particularly when it comes to bookkeeping, we need to set up procedures for monthly review, annual reviews, tracking accounts payable and receivable, 1099s, etc. The inability to implement an effective workflow to track business-critical processes, like accounting, is one the biggest shortcoming we encounter with our clients.

What are some Effective Business Workflows?

We have seen many approaches for effective workflow, and each has its flaws. For example, in the past we have used a master spreadsheet for all of our clients, with action items and check boxes with initials for responsible parties. You can store this spreadsheet in a central data repository, like Google Docs, to you can set up a master spreadsheet with version control. It can be a good workaround, assuming you can maintain it. There always is the “human factor” where managers forget to update a document, or forget to close it so no o



ne else can open it.

And what about managing deadlines? We also have had some experience using Outlook to manage client tasks. Using Microsoft Office, you can assign tasks or use the Calendar function to manage reminders and deadlines, but Outlook has limited capabilities for managing tasks and deadlines.

The key to successful collaboration is establishing a centralized system and effective workflow that everyone has to use to control business-critical information, with alerts and follow-up protocols that are hard to ignore. For most of our clients, we have now standardized on ProWorkflow, but there are any number of other tools that offer similar functionality. The primary benefits of using an online workflow tool include:

- The ability to provide ongoing visibility into open projects.
- The ability to set up automated reminders that can help you remember and meet deadlines.

- Centralized access to all those who need to can access the system.
- The ability to create and assign tasks in a way that promotes accountability.
- A messaging system so you can post project queries or highlight issues related to specific tasks.
- Providing an audit trail so you can see what has been accomplished, and where you have bottlenecks.

For our purposes, using a tool like ProWorkflow offers other benefits as well. For example, it gives both our team and the client transparency into the status of tasks. We can use the system to track hours to see if the time budgeted for a task reflects the timesheets. And since it's web-based, it also means that we can access the workflow data from anywhere, whether we are at the office, the client site, or working remotely.

The important thing is to promote collaboration between the client and our team, and make sure everyone understand what is expected of them. For example, we have a client with an internal bookkeeper and every week we come in to review the books. Tasks are assigned on a weekly basis, with due dates, and logged in the workflow system. We review these tasks weekly, adding notes as needed and archiving them when they are completed. The system lets us negotiate due dates, and prioritize tasks, including setting a hierarchy for tasks that need preapproval or to be accomplished first.

Automating workflow is a great way to systematize collaboration in a way that promotes accountability with an audit trail. The biggest challenge is keeping up with maintaining the system and entering the data. But if you have the discipline to use a workflow system effectively, you'll find that very little falls between the cracks.