

Developing and Managing the Workflow Process

Do you waste time...

Searching, sorting, copying, mailing, faxing, retrieving and routing files? This course will teach you how to develop a process to eliminate this wasted time and effort and in turn help streamline your business process, improve customer service and retention, lower expenses and be more productive and profitable.



The following is an outline of the topics covered for this course:

Are You Ready—Exploring the Paperless Office

4 hours

- Set goals, objectives, expectations
- Total support for and commitment to the process from the owner group
- Confirm benefits outweigh costs
- Changing culture
- Planning consideration
- Potential barriers to success
- Importance of resources

Developing the Implementation Strategy

4 hours

- Pick the team
- Determine hardware and software needs
- Develop a plan and budget
- Establish policies and procedures

Implementing the Workflow Process

4 hours

- *Communicating the implementation strategy*
- *Implementing the strategy (How To)*
- *Determine training needs*
- *Monitoring and follow up*

