

THE WORKFLOW TRAP



**The unsustainable ways we
organize work and how to fix them**



kintone

CONTENTS

CHAPTER 1

What is a workflow? 2

CHAPTER 2

Improving workflows: it's not about the people, it's about the tools 3

CHAPTER 3

Alright, what's wrong with my current workflows? 4

- ➔ Your workflows lack structure
- ➔ Your workflows are decentralized
- ➔ Your workflows are largely manual—and annoyingly repetitive

CHAPTER 4

How do I fix it? 7

- ➔ Create structure
- ➔ Centralize
- ➔ Automate what you can

CHAPTER 5

Change doesn't have to be overwhelming: an intro to the Kaizen method 10

CHAPTER 6

You don't have to do this alone: use Kintone to create effective change 12

So what is a workflow?

Between emails and Slack messages, phone calls and Zoom meetings, the work day can get pretty chaotic. We jump from platform to platform, lost in countless open tabs while still attempting to keep up with the notifications popping up on our computers and phones. But that's just the way it is, right?

When everything feels so choppy, we don't often think of all of our work tasks as a flow. But that's exactly what they are: a workflow. Every phone call, email, and instant message is a part of this flow. But, while you're busy juggling platforms, **you might be surprised to learn that your workflow doesn't actually have to stress you out.** Instead, it's possible for the tools you use throughout the day to transition you seamlessly from task to task—and help you communicate effectively with your team.

Not only can an inefficient workflow increase individual anxiety, reduce motivation, and contribute to burnout, it can also be detrimental to your company as a whole. According to market research firm IDC, **companies actually lose 20 to 30 percent of potential revenue every year due to workflow inefficiencies.** Yet many companies continue to “make do” with their current applications and systems. When you've gotten used to the bottlenecks and go-betweens, it's easy to overlook inefficiencies entirely.

So what can you do?

In this ebook, we'll discuss:

- ➔ Why improving workflows isn't about your people, but rather your tools
- ➔ Why your current workflows aren't setting you up for your best work
- ➔ How to lay out a plan that will improve your workflows.

Let's put the “flow” back in workflow.



CHAPTER 2

Improving workflows:

It's not about the people, it's about the tools.

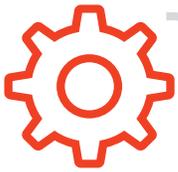
THE HENRY FORD FLOW: RETHINKING THE WAY WE WORK

When we think of productivity, we often think of how much we can accomplish: how fast we can write a report, how many phone calls we can make in an hour, how many meetings we attend in a day. Of course, most of us could probably spend a little less time on Instagram or Facebook. But the truth is that the capacity for what humans can do is limited, and to-do lists, delegating, and getting eight hours of sleep can only elevate productivity so much.

If we really want to make gains in our workflows and productivity, we have to focus on the way we work – like Henry Ford did. Ford knew that to maximize productivity (and profits), he couldn't just tell his people to work harder and faster. While the factory's first cars were made by employees assembling customized cars piece-by-piece on the floor, Ford realized that his employees could do more faster with interchangeable parts and the assembly line. With Ford's innovations, production time of a Model T went from over twelve hours to ninety-three minutes. *That's innovation.*

In other words, Ford invented a 1926 version of workflow automation. Instead of focusing on how his *workforce* could become more productive, he focused on improving the *workflow*. He knew that in order to be as effective as possible in the workplace, he had to re-think the way his employees' engaged with work, introducing new tools to give them the time and space to focus on the parts of the job that really needed them.

Alright, what's wrong with my current workflows?



YOUR WORKFLOWS RELY ON MEMORY.

How much do you really trust your memory? When we're juggling spreadsheets and emails and Slack

messages – and our mind is occupied by non-work related things, too – it can be difficult to rely on our memories alone to do all our assigned tasks during the work day. **We've all gotten off calls with our team and thought, *Wait, so what do I do next?***

And even those of us with self-proclaimed “good memories” struggle. Experts believe that you can only hold approximately **seven items in short-term memory for about 20 to 30 seconds**. What's more, a common cause of forgetting is “**interference**,” which happens when memories are competing with one another. Anyone who has ever worked in an office knows that there always are far more than seven things happening at once, and these things are constantly in competition for space in your brain.

In other words, your memory isn't always the most reliable source. It won't always be able to tell you (accurately) what to do next, who to send that spreadsheet to, or exactly which documents your boss wanted you to send to the client. That makes way for mistakes, miscommunications, and inefficiencies.

Our imperfect memories can present problems for managers, too. As a boss, it's your job to keep track of your employees' memories too; you're in charge of reminding them to do everything they're supposed to. However, it's impossible to know where your employees' tasks stand (In progress? Complete? Or totally forgotten?) without asking, and that can become complicated and frustrating.

When we don't have clear, structured processes in our workflows, our memories are the only things we have to rely on. And when our memories aren't always reliable, how are we supposed to do our jobs productively, efficiently, and as error-free as possible?



YOUR WORKFLOWS ARE SCATTERED ACROSS TOO MANY TOOLS

Okay, say you *do* remember to tackle everything on your to-do list. How long do you really spend completely focused on a task?

Perhaps you're writing a report that requires company data, but each department – sales, HR, and marketing – has its own data silo. You're waiting on your coworker in marketing to send you their team's spreadsheets, and the sales numbers are in a different database. Once you receive all the numbers, you must copy and paste them into a slide deck to present to your boss.

The most frustrating part? The report itself doesn't take you that long to put together. What *did* take long, though, was all the hunting down and copy and pasting of numbers you had to do to complete it; a study by Panopto found that **employees spend an average of 5.3 hours a week looking for the information they need to do their job**. Not only that, but you're constantly distracted by the emails or Slack messages needed to coordinate the sending of data, and you're constantly switching back and forth between different tabs, databases, emails, and apps. And when companies have **an average of 129 software tools each**, there's bound to be lots of switching. This is a disjointed workflow at its finest.

This disjointedness makes it easy for distractions to slip into the cracks. And a study by CareerBuilder found that **even small distractions can make it difficult to complete a task**; once an employee shifts their attention to something new,



Switching tasks can
reduce productivity by
40%¹

it can be hard to refocus. In the gaps between different tasks, it's easy to pop onto social media or grab a snack or text a friend. In fact, the distractions that come with task switching can cost you up to **40% of your productivity**.

And in addition to opening the door for distractions, a decentralized workflow affects the bottom line. Panopto's study found that a **business of under 1,000 employees will lose about \$2.4 million in productivity due to the presence of department-specific data silos that leads to insufficient knowledge sharing**.

That means that waiting on those emails from sales and marketing to put together your report isn't just a time-sucking nuisance, but it's also losing your company quite a lot of money.

¹ <https://liverichlivewell.com/frequent-task-switching-ruining-productivity>

YOUR WORKFLOWS ARE LARGELY MANUAL— AND ANNOYINGLY REPETITIVE

Copying and pasting. Forwarding and resharing. Inputting and converting data. These are all small tasks that don't seem to take up much time in your work day. But when stacked on top of each other over and over again, they take up valuable time without actually getting you closer to your goals. Little frictions can start big fires.

Think, too, about all of the different communication channels you use every day. In one group conversation on Microsoft Teams, your coworker mentioned an important statistic that might be useful to the sales team. In a separate email, they mentioned another. Now, you have to forward this information – the stat from Microsoft teams and the one from email – to the sales team so that they can see it all. These repetitive tasks leave employees disengaged and bothered, and **90% of employees are burdened with boring and repetitive tasks every day**. Not only does a disinterested workforce breed subpar results, but these tasks take time and energy away from more interesting work that employees were actually hired to do.

What's more, monotonous repetitive tasks leave plenty of room for error; a study published in the Journal of End User's Computing found that **88% of spreadsheets contain errors** that affect a business' bottom line. What if you copy and paste the wrong stat, or remember incorrectly what your coworker mentioned in the group chat? This could be a mistake that affects your company's productivity *and* profits.

Yes, everything is now digitized, and yes, it's made things like relaying stats and communicating with colleagues easier. But digital conversion isn't equivalent to digital transformation. In other words, while we've digitized tons of workplace processes with a variety of tools, that doesn't mean we've made them as efficient and error-proof as they should be. To achieve peak productivity, we need to shift our perspective, looking at our workflows holistically to discern how we can interact with our countless digitized processes and make them *flow together*.



**Monotonous,
repetitive tasks
leave plenty of
room for error.**

How do I fix it?

Good news! There's a solution that will minimize distractions, frictions, problem solving hiccups, and more to ensure your team is operating within a design that sets them up for success.

Okay, so what does this look like? Let's dig in.



Kintone's workflow management platform lets you lay out a process from start to finish and track every little step. Assign tasks to specific people or groups, easily check the status of tasks, and see what the next step in the process is for ultra-clear accountability and efficiency. [Learn more.](#)

STRUCTURE: HAVE CLEARLY-DEFINED PROCESSES

As previously mentioned, human memories are nowhere near foolproof. We've all forgotten to complete an overdue task or send an important email. Sometimes we even forget to eat breakfast. That's why we need clearly defined processes in our workflow. **But how do you establish these ultra-clear processes? Here's a brief guide:**

- ➔ **Map out your current workflows.** Think about a "day in the life" at work. Consider all things big and small, from the projects you send to clients and the emails you send to coworkers. Everything is part of your daily flow.
- ➔ **Eliminate! Identify steps that cause friction, and eliminate them.** For example, calculate the number of times you need to transform data into information your boss or your coworkers can use. Calculate the amount of times you copy and paste when creating a spreadsheet. Then, ask yourself what automated tools you can use to make the system simpler, more efficient, and less time consuming.
- ➔ **Choose tools that allow visibility.** How does each step fit into your big picture flow? Choose tools that make it easy for everyone – from the employee to the manager to the colleague – to clearly see how each task fits together and helps the company tick. Task and workflow management tools can help with this, giving you a collaborative space to map out steps, assign tasks, and automate the tedious stuff.
- ➔ **Determine the information-sharing flow.** Establish a system for sharing information that's uncomplicated and quick, so that everyone has access to the conversations and data that are important to their role.
- ➔ **Get everyone on board!** Your new system won't work unless managers and employees alike buy in. Give your team enough information that they can adopt new tools with excitement and understanding.



CENTRALIZE: CREATE VISIBILITY AND ACCESSIBILITY

Centralizing is critical for a better workflow experience; you want information to be accessible to all who need it from start to finish. But how can you make this happen?

Set up a home base platform for your team where everything is visible by default. No extra passwords, email forwards, or unnecessary chats required. It will:

- ➔ **Organize your data in one accessible place.** Need to see those sales numbers or social media metrics? While still secure and protected, this data will be accessible by default, eliminating the painstaking process of trying to connect with busy colleagues. Instead of wasting time securing the data, you'll have more time to spend actually using it.
- ➔ **Combine your communication and data for seamless sharing.** Instead of transferring data into an Excel spreadsheet and then forwarding it via email (which, let's be honest, can take all day), choose a platform that lets you share usable data in one place. Quick, easy, and accessible to all.
- ➔ **Eliminate the need for single-purpose tools that can't finish the job.** Often, single purpose tools are great at what they do but not-so-great for your workflow; it's difficult (and stressful) to be chatting on Slack while digging through your email inbox for an Excel spreadsheet while updating the status of your team's project management tool. Instead, choose an all-purpose tool that lets you consolidate your tasks onto one single platform.



Kintone can function as the main workspace for all the various workflows your team handles. Whether it's expense report approvals, content requests, or sales activity logs, your team can see it all in one organized place and easily share and refer back to files, information, and conversations.

[Learn more.](#)



With Kintone's automated workflows, your team can streamline task handoffs and approval processes. See at a glance who's assigned to each task and set up custom notifications and reminders so that everyone knows when it's their turn to do something. No follow-up emails necessary! [Learn more.](#)

AUTOMATE: ELIMINATE REDUNDANCIES

Why do a mundane, administrative task over and over again that a digital tool could do just as well—and faster! With a more organized and automated workflow, you can eliminate tiny frictions and save time for the tasks that are truly productive (and even enjoyable); **33% of organizations that utilize automation in their processes are more likely to be “human friendly workspaces, in which employees are 31% more productive.** With automation, you'll be able to:

- ➔ **Automate task hand-offs and follow-ups by setting up notifications.** This eliminates the need for unnecessary emails, instant messages, or meetings that get in the way of the task at hand.
- ➔ **Make data accessible to all. How many websites do you use to hold your data?** And how many times are employees instant messaging or emailing their coworkers to share passwords and codes? The answer to both is probably *a lot* – and it probably gets pretty exhausting and repetitive. When you centralize your workflow, those redundancies disappear – and your time reappears.
- ➔ **Make problem solving accessible to all, too.** Again, problems in the workplace are common and expected. More often than not, they're often resolved with team collaboration and discussion (or, in more extreme cases, maybe even speaking with an expert). But even if they're resolved once, it doesn't mean that the same problem – or one similar – won't come up again in the future.
- ➔ **Therefore, it's important that these problem solving collaborations and discussions don't happen in private emails or instant messages.** You want your employees to have tools that allow answers they can easily access, so that if another problem does arise in the future, they'll know just where to go to solve it – setting your team up for more efficiency and less problem solving anxiety.

Change doesn't have to be overwhelming.

AN INTRO TO THE KAIZEN METHOD

Perhaps you're comfortable with how things are done at your office, and you aren't sure you're ready for a drastic change all at once. That's okay! Actually, that's *good*. It all starts with a little shift in perspective.

Enter: The Kaizen methodology. **Kaizen methodology** promotes an approach that pushes forward “the continuous improvement in an organization, based on constant small positive changes that can result in major and more significant growth.” Put simply, your organization doesn't have to leap right away. **Small steps in a more efficient direction are great too, and can catalyze big change.** It's about shifting perspective, building sustainable habits that will change the way you work.

You don't have to introduce new management tools all at once. In fact, your employees will probably feel overwhelmed if you do. But once your team recognizes that they don't have to

be stuck with an inefficient, time-consuming process just because it's the way they've always done things, they'll be more open to—and even seek out—more opportunities to grow and improve workflow efficiency.

Therefore, it's important to choose a workflow management software that can adapt as your company's needs change.



You need tools that take small steps alongside you—and generate big results.

Small Team, Big Impact: The Benefits of a Clear Workflow

Jessica Lee is a staff attorney at the Center for WorkLife Law, a small legal clinic that operates out of University of California Hastings' College of Law. Her team of ten focuses on ensuring workers aren't discriminated against as a result of their caregiving responsibilities and family needs.

One of the many initiatives that Jessica and her team run includes a national hotline for people experiencing workplace discrimination.

Jessica's challenge was to find a way to manage this hotline:

"The way it works is this: Somebody calls us or emails us because they need help. A member of our intake team gets in touch with them to get a general understanding of what they're experiencing. The person doing the intake consults with an attorney. Sometimes, the attorney is able to share resources or advice directly. Other times it's more complicated, and there are follow-up tasks, like writing a letter or making a phone call on that person's behalf."

"The goal was to find a platform that could help us manage this process in an open and transparent way that wasn't going to break the bank."

The team needed a tool that would let them lay out the steps of the entire hotline workflow in one place and easily see the status of all the open cases. Jessica used Kintone to build out the hotline workflow and track each step of the process.

"Kintone keeps us organized and accountable. All the information is there so we never have to worry about dropping balls because someone is out. We can track our progress so easily, which allows us to have trust in each other and that things are getting done. **Kintone's given us the tools we need to help hundreds of people.**"



Date	Name	Phone Number	Email Address	Language	Cor
Apr 16, 2021	Coe Clut...	855-425-8368	cclutterham@gmail.com	English	West
Apr 16, 2021	Carmon ...	221-698-1506	celyahu@state.gov	English	Sed
Apr 16, 2021	Hil Labrenz	282-954-1873	hlabrenz7@infoseek.co.jp	English	Mar
Apr 16, 2021	La verna ...	203-365-9112	laverna@bloomberg.com	Spanish	Proi
Apr 16, 2021	Feodor B...	556-226-5183	fbritten0@pagesperso-ora...	English	Fue

1. Initial Outreach

App: 1. Initial Outreach

Cancel Start

Name * Phone Number

Email Address Related Intake Profile
Add description of any settings
No records found to be related.

Date How did they contact us? Language *

Contact Content

Jessica and her team can now quickly see which cases are still being worked on and who's currently assigned to them.

The intake team can also follow along the clearly laid out steps and view the different questions they should ask depending on the type of case.

[Read more customer stories >>](#)

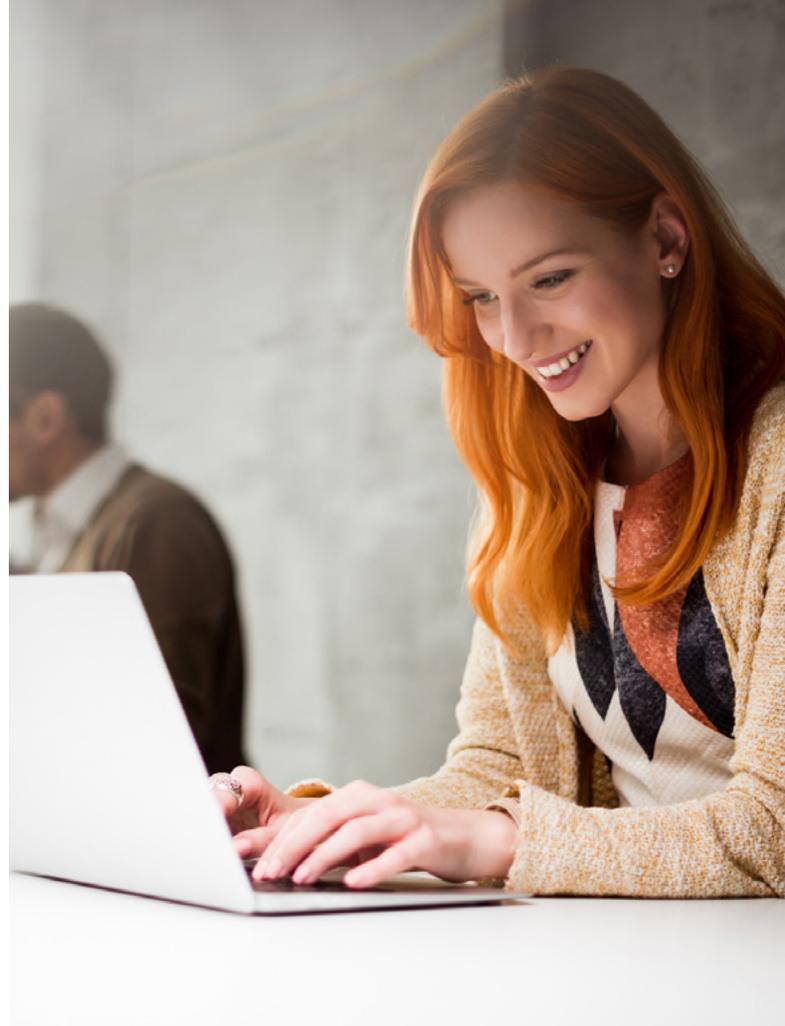
You don't have to do this alone.

USE KINTONE TO CREATE EFFECTIVE CHANGE.

Imagine a world where you weren't spending two or three hours a day answering emails or sending Slack messages. A world where you didn't have to wait for that document to be forwarded from sales to marketing to HR to start digging into that report, or where data is accessible company-wide quickly, easily, and efficiently. A world where your employees are logging off their computers at the end of the day thinking, *wow, I got a lot done today.*

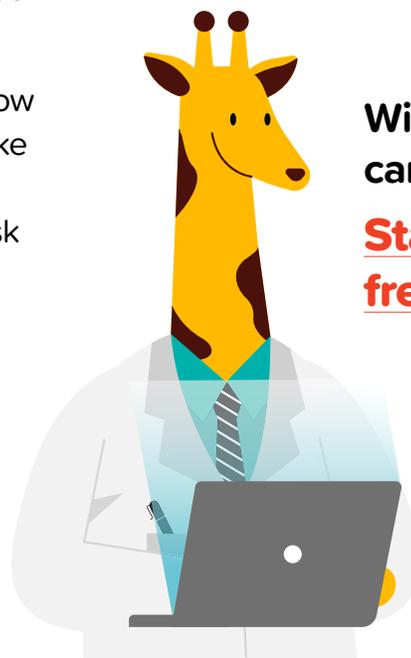
While it may seem far away now, that world is easily within reach. Seriously! The solution is a clearly defined process, a place to track it all, and automated features that allow you to focus your energy on the *human* parts of your job.

With **Kintone**, you'll have an all-in-one workflow management and automation tool that will take your efficiency to a whole new level. You can build customized workflow apps for every task or process, collaborate on projects, access and pull reports (no spreadsheets required!),



and communicate with colleagues like never before. And the best part? There is absolutely no coding involved.

No, we might never delete our social media accounts or make that productivity spreadsheet. But it's finally time to take the heavy weight of productivity off humans and put it on Kintone.



With Kintone, you can get work flowing.

Start your free trial today.



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