



Building Effective Business Processes with Workflow Software

Every day large volumes of paperwork can become difficult to manage, often leading to data entry errors, loss of information and inconvenient work delays. This inefficient use of time, equipment and resources can result in significant financial losses for any sized business.

Many companies look to workflow software to scale up their productivity. Workflow software is comprised of a set of tools aimed at maximizing all the benefits of performing automated business processes while reducing costs. It allows individuals to automate repetitive business processes and easily follow up on uncompleted tasks. Users gain knowledge into workflow performance with in-depth visibility into what needs to be done, who is involved in the process and what will happen after an action is taken. In order to build effective automated processes, organizations can implement workflow software that will deliver the following five essential features:

Accessibility

Today, the [most efficient workflow software](#) systems are mobile accessible, providing users the ability to give approvals and access data and reports from any location at any time. It's not enough to rely on one platform, as workflow software should be compatible from Mac to PC, tablet to smartphone and laptop. With mobile accessibility, security is a requirement. Advance workflow software offers role-based access control so that workflows containing sensitive information can be kept hidden from certain users. Administrators can easily customize what each individual user can see and do.

Visibility

High level decision making depends heavily on the documentation at hand, corresponding data and effective communication, which can be tough to monitor. Decision makers want to know quickly which processes are on track and which ones are in need of attention. Advanced workflow software provides a structured, centralized system allowing users to effectively track business processes as they are completed. Of course, building automated business processes within workflow software, may result in inefficient process design. [Robust, built-in workflow reporting](#) improves visibility, allowing users to see what's being held up and where to focus attention. This allows key people to instantly check the status of a process, analyze critical workflow steps and make effective decisions.

Notification

Within a busy environment, people tend to abandon documents if they are not reminded of them. An effective workflow software system will send notifications to remind users of action items such as upcoming approvals, data entry and indexing. With automatic notifications, users no longer have to wait for someone to hand off a document onto their desks. Workflow software makes business critical documentation available on demand, immediately accessible and ready for action. Event triggers add flexible intervals between workflow actions based on the timing of a process. A process can be set to notify a user once a week, once a day, or once an hour. Ensuring best practices, by eliminating paper chasing and reducing processing delays, workflow software confirms that all steps have been completed correctly and checkpoints met before moving forward.

Nonsequential Routes

It's no doubt that certain processes need multiple manager approvals and review. Instead of building several different workflows for each department, advanced workflow software allows users to create [one complete workflow on a singular design canvas](#) that follows a different track depending on which department will do the approving. All steps can now run simultaneously as opposed to sequentially so that more can be done in less time, making the process more efficient.

Integration

The best workflow software systems will integrate seamlessly with an organization's existing business applications such as [QuickBooks](#) and [SalesForce](#). Users can also integrate their document management workflows with office equipment, including printers and scanning devices, which acts as the catalyst for workflow automation. Additionally, [form designing platforms](#) incorporate workflow software to allow data to be accessed and worked the moment it is captured, for more efficient and faster completion.

Workflow software makes any organization become more efficient by helping to save time, avoiding unnecessary manual work and making better use of resources. There are multiple reasons to consider using workflow in an organization. Consider these five features and more, when it's time to implement a workflow system in your organization. Learn more today by [contacting Square 9 Softworks](#).

Marketing Communications Manager, Lauren Ford, is the dynamic voice behind Square 9 Softworks. Delivering highly effective messaging across reseller channels, end user communities and outside agencies, Ford develops, drives and executes communication plans that effectively support Square 9's overall marketing goals and objectives. To learn more contact lford@square-9.com.