

# Making work, work!

How to choose a workflow management system.

**Head Office:** 17 Stephenson Court, Fraser Road,  
Bedford, Bedfordshire, MK44 3WJ

**Stafford:** Lodge 17, Dunston Business Village, Stafford  
Road, Penkridge, ST18 9AB

**Tel:** +44 (0) 1234 831000

**Email:** [info@intermedia-global.com](mailto:info@intermedia-global.com)

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# What is a digital workflow management system?

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**A Workflow management system is a piece of software designed to help you create, automate, track and measure the delivery of a series of tasks that make up an overall business process or workflow. This can bring several benefits to organisations such as:**

## **Process Standardisation and Adherence**

People don't always follow your business processes exactly. Often a training gap, or people taking the 'path of least resistance' can result in processes not being followed correctly. Workflow management software will help to ensure that everyone follows the same process with no variations.


**Process Automation** For any process to complete successfully, it needs proactive communication amongst colleagues. For example, colleagues need to notify one another when it's their turn to work on a task. Workflow management software automates the handover of work process, using push and email notifications, to notify the next person in the process of their turn.

## **Improved Collaboration and**

**Transparency** By providing one central platform for employees to manage the delivery of their work, where users can work together, share ideas, create content and manage complex processes, all whilst maintaining an overall system of record for ongoing audit trail.

**Reporting** Deliver dashboards and reports that provide a real time view of activities across your team, department, or organisation. This can help managers analyse processes and make improvements, it can also help assess the overall health of your department and the work being managed within it.

When these benefits are realised by an organisation, business processes will become more effective and lead to higher company-wide efficiency. It is no wonder that more and more organisations are turning to Workflow Management systems to co-ordinate the delivery of their work processes.



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# How to choose a workflow management system?

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With so many platforms now available in the marketplace, it can be difficult to know where to start. We recommend focussing on these key areas when conducting any assessment of your potential new system.

## Be clear of your business objectives and the outcomes you want to achieve.

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# Understand the type(s) of Work Process you want to manage.

Before engaging with any Workflow management vendors, it is important to understand what types of work you want to manage. Having a good understanding of your processes will help you identify the requirements for any new system and will provide a framework for you to assess your vendors against.

Although many Workflow management systems on the market today claim to accommodate all manner of work, many of them perform better in some areas than others. Here are some examples of the types of work that could be managed through a Workflow management system and some questions you may want to ask when evaluating any potential vendors:

**Project Portfolio Management** How does the solution manage complicated portfolios of work that span multiple teams or departments? What resource management and capacity planning features does it have? How can the system track project finances and report on project health?

**Service Desk / Ticket based operations** How does the solution facilitate work intake / briefing? How intuitive is the form building capability? How does the system measure and report on KPI's and SLA's?

**Agile processes** How is a product backlog managed and maintained in the system? Does the platform facilitate SCRUM and KANBAN agile processes? Can metrics such as burn-down or velocity be measured? How can a larger piece of work (or Epic) be broken down into smaller stories and tasks within the system?

**Content Marketing Processes** Does the solution integrate with the appropriate channels, such as Social Media Platforms, Content Management systems, or ad platforms? What Digital Asset Management capabilities does the system have?

**Approval Processes** How are approvals facilitated through the system? Does the system have any proofing capabilities? What records are kept of approval decisions and how can this be audited?

## Pick a platform that your teams will use.

The single most important aspect of any software implementation is user adoption. You can spend months setting up a new system or invest thousands into it, but ultimately none of this matters if the system is not adopted correctly by your userbase. When assessing any Workflow Management vendors, be sure to review the ease of use of the system. Don't just take the salesperson's demonstration of the platform at face value, ask for a test drive or trial period and test the system with a sub-set of your user base.

It's also important to understand what training and support the vendor provides to help your team(s) learn and adopt the system. Is there comprehensive training documentation and videos? Is there a user community or forum where people can go to ask questions? What technical / helpdesk support is provided? Ensuring that your chosen solution is easy to learn and use, will ensure that it is adopted correctly and enable ongoing success.

## Be sure it will integrate with your tech stack.

In the delivery of day-to-day work, your teams are likely interacting with multiple different tools. Your workflow management solution will underpin the delivery of your work processes and should pull all these tools together for a streamlined process.

A well-integrated system will ensure that your team(s) do not have to keep flicking between tools, will increase efficiency and will help to maintain an end-to-end audit trail by syncing the data between your systems. Be sure to check that any Workflow Management system you assess will integrate with your core technology stack.

# Focus on the must have features.

**Accountability and Audit Trail** Workflow management systems should maintain a record of all activities — who did what, when and how long did it take? Enabling you to retrospectively search, print and document what actions were taking during the execution of work at any time. This makes life easier in the case of any audit and is particularly important for regulated businesses who need to maintain a fully auditable system of record.

**Reporting** A good workflow system captures and stores data and metrics during the execution of your workflows. This data can be visualised in reports, displayed on dashboards and made available to users. This in turn facilitates the real-time tracking and monitoring of process flow and status, helping you to identify bottlenecks quickly and easily. Furthermore, a system with good reporting capability will provide you with the ability to assess the health of your team(s), their processes, the work being executed and will give you the ability to identify process improvements

**Form Builder** Forms are used to brief work or capture organisational specific information in the delivery of your processes. Good Workflow Management systems will provide form builder functionality that enable you to create sophisticated, dynamic forms that are simple, engaging, and user-friendly.

**Open API** It's impossible to provide out of the box integrations for all the applications a business may need to

connect to. Data can be pulled or pushed in a multitude of ways in or out of numerous systems. The best approach to managing for now and in the future is to provide a completely open and flexible API that can be used by the customer, the vendor, or an outside integrator to connect any workflow with any system

**Security and access control** Some of your workflows are likely to contain information that shouldn't or doesn't have to be shared with everyone. Furthermore, internal business processes can often contain sensitive and confidential data. A good Workflow Management system will allow you to easily customise what users can see or edit. It will also allow you to set role-based access levels, where you can specify which actions a user can take based on the role that have been assigned.

**Reminders, Notifications and Escalations** As your business processes are carried out, each person must be notified when it is their turn to work on a particular task. Workflow Management systems send out email notifications to the individuals assigned to tasks in your work process. However, despite this, sometimes people don't take action in a timely manner. They're busy, distracted with other priorities or simply forget. A good workflow tool will automatically send reminders when appropriate, removing the need for teams to manually chase up their team members. Furthermore, a great system will also allow you to delegate your work to others when on leave, or to escalate the work to a peer or supervisor when a time limit expires, helping to ensure that work is always routed to and actioned by the relevant person in a timely manner.

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# In conclusion.

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A Workflow management system is becoming ever more important in today's fast-paced environment, even more so in the modern day remote working climate where teams can become disconnected, and collaboration made increasingly more challenging. Workflow Management systems help organisations overcome such challenges by providing a central transparent platform where teams can go to work together, stay organized and improve productivity.

When investigating a new Workflow Management system, be sure to assess solutions that:

1. Will contribute to your business objectives
2. Fit the types of work that you execute
3. Are easy to set up and adopt by your user base
4. Will seamlessly integrate with your core systems
5. That have a rich set of features that allow you to manage your work effectively and efficiently work effectively and efficiently



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