



Optimizing Processes for Complex Workflows

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Every industry and business has its own workflow processes, but some are much more complex than others. The term “workflow” gets used a lot and can mean many different things depending on how your business runs. If your business utilizes documents to establish relationships with clients, fill orders, or provide service, optimizing your workflow process can noticeably improve the efficiency of your day-to-day tasks.

When paper is moved around an office and or across departments, work becomes extremely time-consuming. Members of your team whose time is best spent elsewhere can get bogged down in the organization, filing, and completion of documents. Some businesses even look to administrative work simply for filing and organization, and that can put a dent in your profits.

For your bustling business, attempting to improve your workflows can seem like a daunting task. Thankfully, the solution to your problem could be much simpler than you think. Implementing a better system may mean learning something new, but in the end, you'll save time and manpower that can be better used elsewhere.

A Document Management or Workflow Solution

Manually organizing and preparing your workflow needs is time-consuming and, frankly, unnecessary. Today, there are document management and workflow solutions available that have smart technology platforms to improve your workflow or document management process. This can eliminate the need for manual work from your team and prevent the costly loss of important documents.

Document Management

Document management is important for businesses that are constantly retrieving paper documents. If a document currently in your possession is required to complete a task, how are you going to find it? You could waste hours looking for it, perhaps only to discover that it has been misplaced. But with an electronic document management system, you can scan all of your important documents and easily search for them when needed, which would take less than five minutes of your time.

With all your documents in one easily manageable system, you will never lose another important document again or spend hours searching for what you need in a pile of paper.

Workflow Solutions

Implementing a workflow solution simplifies your day-to-day processes. Let's take the example of a general shipping company. When an order is received and logged in your workflow system, it is queued up for the next available employee to process. Once the order has been processed, your employee would simply click a button, and the document would be sent to the shipping queue.

The shipper can then sign the document confirming that the order is being delivered, scan the document, and merely click a button to save the shipping information. All of the documents related to this purchase order would be saved together for ease of retrieval in case the customer has any questions, a problem arises with the shipping, or there is a dispute over payment for goods.

With a workflow solution, you no longer have to worry about where something is in its life cycle or whether it has been handled appropriately. You can easily look up to see who is handling it or where it is in its queue and take the appropriate action.

On an automated workflow platform, you can also create rules that control the flow of work based on conditions. For example, you could set a rule to enqueue an order once it has been processed by an employee, allowing any other employee to assume the task. Alternatively, you could send the task to a specific person if it is unique and cannot be handled by just anyone.

What Is Best for Your Business?

Most businesses will choose to implement both document management and workflow solution. However, some may only need

document management to store and quickly retrieve documents. On the other hand, if your workflow processes are complex, employing document management and a workflow solution will increase productivity and reduce the need for complex retrieval methods. The document management part helps you keep and find all of your information and data, while the workflow solution helps push all of your tasks and documents to the right people or queues. This is the most popular option, allowing you to take advantage of both solutions for increased productivity. It is not possible to have just a workflow solution, as it needs document management information to create tasks.

Every solution you find may be a little different, so it is important to know what is necessary for your business to function at its best. Your needs are unique, and your document management and workflow vendor should be flexible and able to help you build a customized solution.

[Contact us](#) to learn more about finding the right document management and workflow solution and what Optix can do to improve your daily workflow processes.