

Work Flow Automation

What you need to know before you flow



What will workflows accomplish?

- consistency
- time efficiency
- streamlining
- productivity
- quality

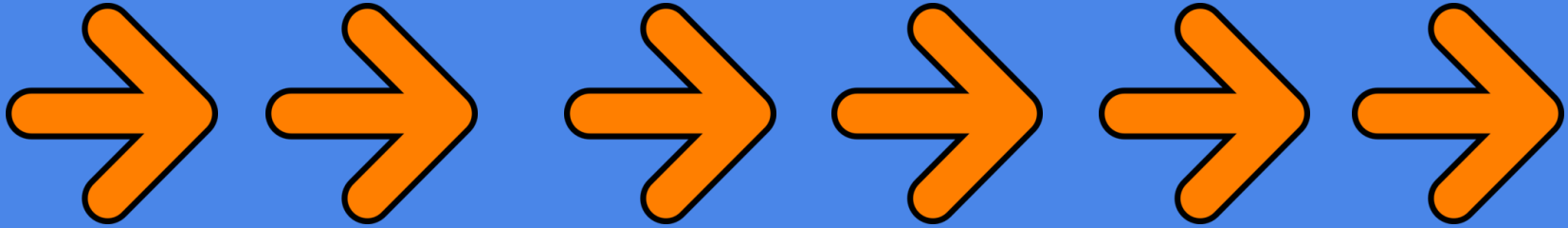


What and where are your processes?



If you're like a lot of organizations your processes and rules are *scattered* all over the place or haven't even reached the point of full comprehension by your managers and employees. "I have a system in my head"

Why is disintegration a problem?



- You fail to deliver “*consistent execution*”
- Your team doesn’t have a reference point
- Training is erratic and incomprehensible
- Inherent inconsistencies make diagnosis difficult

Software is the tool:

"The aim of software is to repetitively produce complicated artefacts in an efficient way."

Therefore, in my opinion, the purpose of software is to simplify repetitive and complex things. Stay out of spreadsheet hell and k.i.s.s.

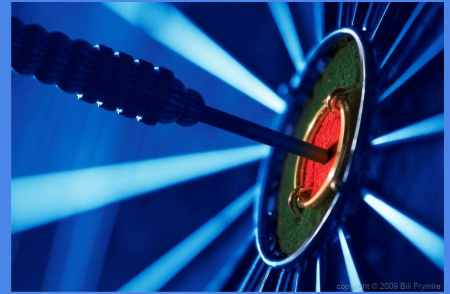


Things that can become a process

- Advertising
- Recurring Marketing
- Sales
- Implementation
- Education
- Retention
- Fulfillment and Processing (and much more)



Your Workflow Must ...



- Be finite and compartmentalized
- Articulateable (I made this word up)
- Visually represented (visually concrete)

Your work flow does NOT...

- Have to be perfect initially -- Get started and optimize!
- Need to be “over-engineered”
- Replace management or workers

(It enhances them)

It is a “Work” or “Human” “Flow” or “Logic”



What is a workflow?

- A flow is a series of steps in a process
- Steps are “coordinated” to form a set of instructions
- A Milestone represents a completion of a series of steps



Flows vs. Work

- Flows are sequential (ordinal)

ie step 1, step 2, step 3

- Flows are declarative

ie “do not send”

- Flows are made of rules .. rules are logical

- Work in this context is distinctly human



Sneak Peek into DisputeSuite's Workflow Module

- **Milestones:** A goal that represents the completion of a series of steps.
 - **Steps:** The actions taken to reach a specific milestone (goal).
 - **Actions:** Various actions that perform automatically until the step is complete or when the step is complete (email, sms, notes, etc.).

Example Workflow Setup

- ☒ Steps & actions
- Edit Setup
- Delete Workflow
- ☐ Collapse Steps
- ☐ Expand Steps

Milestone Round 1 Dispute Process
Step Round 1

Actions

Round 1 Dispute Process

Milestone/step	Actions	Due Date
Round 1	8 actions	45 day(s) after step starts
Start	When workflow is started	
Due Date	45 day(s) after step starts	
Completed	Suspend entire workflow if step becomes past due When dispute results are entered	
	Edit Duplicate step Delete	
Action will run when step is 'In progress'		
Run: 7 Days after step starts. Action Send Email		
Run: 14 Days after step starts. Action Send Email		
Run: 21 Days after step starts. Action Send Email		
Run: 35 Days after step starts. Action Send Email		
Run: 42 Days after step starts. Action Send Email		
Run: Immediately after step starts. Action Create Note Round 1 Printed		
Action will run when step is completed		
Run: Immediately after step finishes. Action Update Record		
Run: Immediately after step finishes. Action Create Note Results Entered for Updated Credit Report		

Set Due Dates for specific actions

Automatic Step Completion based on an action in the software. For example, "when dispute results are entered."

Automated Sequence Delayed Email Notifications

Automatic Note Creation in Customer's File

Automatically Updates Customer Record Fields

Add Milestone

Workflow Step Start and Completion based on specific actions in the software, which will trigger the **workflow sequence automatically**.

Step setup

* Step Name	<input type="text"/>	<input type="checkbox"/> Step is optional ?
* Start	How does the step start? A step can start automatically based on same event or manually.	
* Completed	based on same event or manually.	
Due Date		

☐ Automatically complete step on due date

Letters & Disputes

Step setup

* Step Name	<input type="text"/>	<input type="checkbox"/> Step is optional ?
* Start	How does the step start? A step can start automatically based on same event or manually.	
* Completed	based on same event or manually.	
Due Date		

☐ Automatically complete step on due date

Customer Portal

Step setup

* Step Name	<input type="text"/>	<input type="checkbox"/> Step is optional ?
* Start	How does the step start? A step can start automatically based on same event or manually.	
* Completed	based on same event or manually.	
Due Date		

☐ Automatically complete step on due date

Invoices & Payments

Action Autoresponders

Workflows » Test Workflow

Test Workflow

Milestone/step	Actions	Due Date
Your Milestone Title		
Step Title Here	No actions	
Action will run when step is 'In progress' No actions		
Action will run when step is completed No actions		

Automatic Actions that can occur when a step is in progress and / or after completion.

Core Actions

- Update record field
- HTTP Post
- Workflow**
- End/suspend current workflow
- Portal**
- Turn Portal on/off
- Start/stop interviewer
- Communication**
- Create new task
- Send email
- Send SMS message
- Send Left message
- New note
- New attachment

Support Center
Questions, problems, feedback

JUST GUARD
Security Scanned 07/23/14

AUTORESPONDER LIST

Update Record Field
HTTP Post
End / Suspend Current Workflow
Turn Portal on/off
Start / Stop Interviewer
Create a New Task
Send Email
Send SMS message
Send Left message
New Note
New Attachment

Want to learn more?

Email Jennifer Cullen: jcullen@disputesuite.com

if you are interested in learning more about the workflow module and assistance with workflow setup.

Join us next time!

Make sure to [join us](#) for next week's
DisputeSuite Weekly Webinar.