



CHECKLIST:

# 7 Steps to Streamline Your Workflow

A normal day at Vsimple typically means engrossing ourselves in a new process we can define and streamline. While many of our partners lean on us to address these needs, we've come to recognize the near-universal need for process improvement, especially in equipment distribution.

Streamline order processing, rental cycles, service and warranty claims and any other equipment distribution workflows with greater speed, accuracy and insights. If you're ready to DIY your way to a better process, our checklist provides 7 actions to implement today.



# 7 ways to bring efficiency & simplicity to your working methods.



## Step One: Identify Problems and Outline Goals

Every good solution starts with defining the problem. Ask yourself: are we trying to reduce wasted time, minimize errors, improve daily work, or something else altogether? Whatever it is, define success for this exercise so we can measure the output of the following efforts.



## Step Two: Define the Three P's

While thinking about the workflows, don't forget you'll also need to label the people and the platforms responsible for managing the process. Define (and color code) the people and platforms in the process so you understand where or with whom steps live.



## Step Three: Choose a Diagramming Software

Look, we love whiteboards as much as the next company, but eventually you need to ensure your processes can't be wiped away with a dry eraser (and use standard diagramming symbols). While we're partial to Whimsical, the following options are also as solid as your processes soon will be: Gliffy, Visio, LucidChart and Miro.



## Step Four: Map Best-Case-Scenario Workflows

Now that you have the problem defined, the players and platforms outlined, and the tools you need, it's time to walk through processes step by step. Highlight areas where you observe redundancies or bottlenecks, and discuss if there's a way to eliminate them simply by changing your internal requirements. If not, you'll want to look at the next section.



## Step Five: Evaluate and Implement Tech

Many process issues aren't really process issues, they're system issues. Workflows may be well defined, but if they're using antiquated technologies, they may take more steps or time than is necessary. Look at options to centralize and standardize the work that happens every day. Rumor has it Vsimple is a decent option for this.



## Step Six: Test and Prove

It's important to validate that the changes made were impactful. When implementing the new process (ideally with a control group), use a time trial or methodology to determine if the time savings have been realized. If the hard data isn't available or obscured by other factors, go the qualitative route and interview affected users about their experience. Whenever you make an investment, it's important to understand what the impact is on your company's wellbeing.



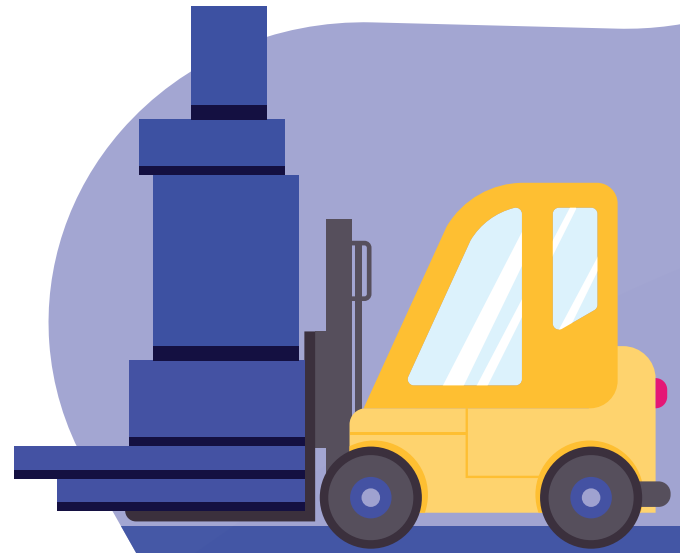
## Step Seven: Rollout

Now that you've established and tested your new process, it's time for the limelight. Take time to define your rollout strategy, including a training plan, data imports that should occur and a winding down of any legacy processes or systems.

# The Takeaway

It's never easy to rethink the old ways of doing things. Hopefully with a clear mind, simple checklist and an abundance of online tools and resources you can now take the first steps needed to prepare your equipment distribution business for the future of work!

Ready to automate, centralize, and standardize your workflows with Vsimple?



We're **Vsimple**,  
the full-service  
workflow  
management  
platform.

Don't waste another minute finding, learning, configuring, training, or maintaining your workflow tools. Our white-glove workflow specialists analyze your operations and then customize, launch, and support your Vsimple workplace.

The result: faster processes, higher accuracy & better insights - without the hassle.

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