

START

# Where To Begin With Workflow Management.

**workflow** *CON*



# Start

New to workflow? START sessions are for you. Join workshops, panel discussions, and breakout sessions that hand-hold you through how to get started, clear the myths around workflow management, and answer your questions.



**The hardest part of going for a run is putting on your shoes.**



# Today's agenda

1. Getting Started
2. Workflow Elements
3. AI, Automation and Workflows
4. Always be iterating





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[Calmwaters.ca](http://Calmwaters.ca)

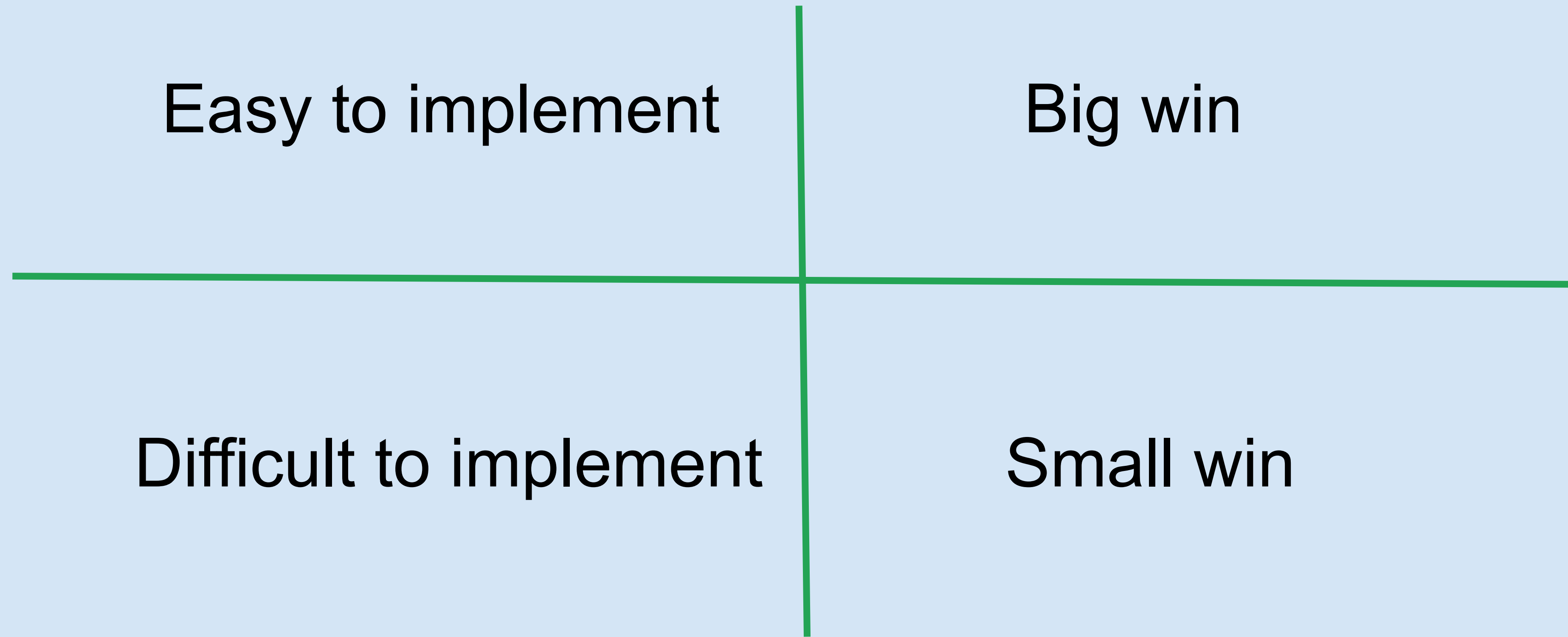
I want every accounting professional to love running a cloud based firm as much as I do.

# Begin with the end in mind

Define the desired outcome of the workflow

Define why you need the workflow

# Workflow implementation matrix



# Just get building

Get started with the milestones

Then add the details



# Elements of a workflow



Task list



Sub tasks



Best practices

# Elements of a workflow



Dependancies



Communications



Time tracking

# Cadence of work

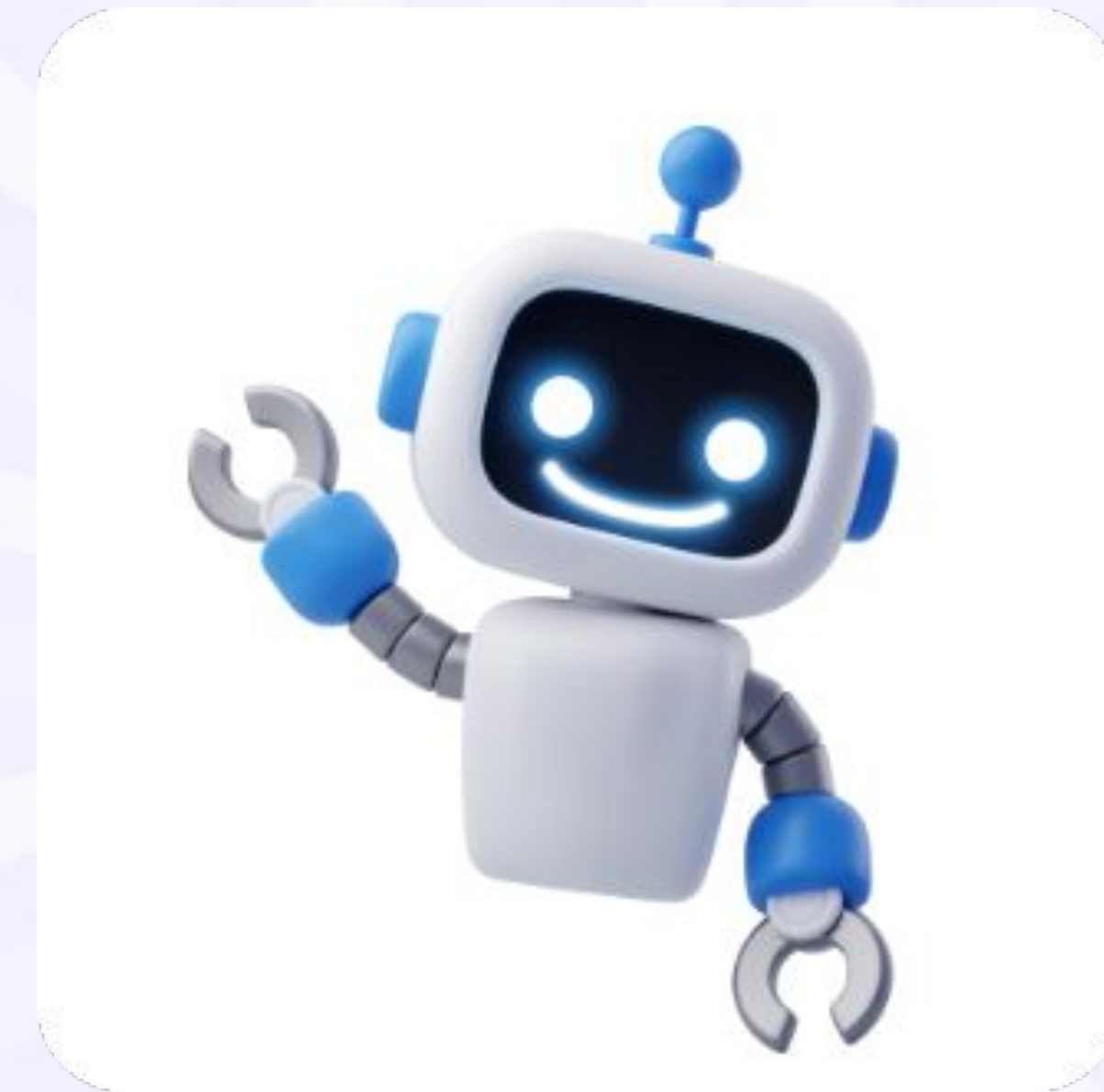
Build workflows based on the cadence of the work

Weekly, monthly, level of complication, outlier team members

Gratuitous dog photo



# AI and automation in your **workflows**



# Artificial Intelligence

The big benefit of AI in your workflow is getting you un-stuck on starting workflows and writing your communications



# Automation decision matrix

Can you delegate to someone without concern for the outcome?

Is it a repeatable process?

Does the automation benefit outweigh the consequences of an automation fail?

**Are you that confident in the process?**

**The same outcome and process every time?**

**Will fixing a fail be embarrassing and/or time consuming?**

# FC automation

- Client reminders
- Tags
- Email deployment (love this new feature)
- Recurring projects (custom recurrences is da bomb)
- Close projects

**How about that confetti?**



**Always be  
iterating**



# Summary

Stop overthinking

Define your outcomes

Build workflows by your cadence of work

Leverage Financial Cents' AI and Automation

Always be iterating



**Start a free 14-day trial**

[www.financial-cents.com](http://www.financial-cents.com)

Thank you

# Icon library

