



**5-STEP
GUIDE TO**

**BOOST
TEAM**

WORKFLOW

40%

Some reports estimate that almost half of clinical office work is redundant or wasted effort.



Institute for Healthcare Improvement

40. Percent.

Examples include staff taking messages and looking for a chart for a repeat phone call requesting a prescription refill, or preparing for an office visit and the patient doesn't show up for the appointment.

Looks familiar?

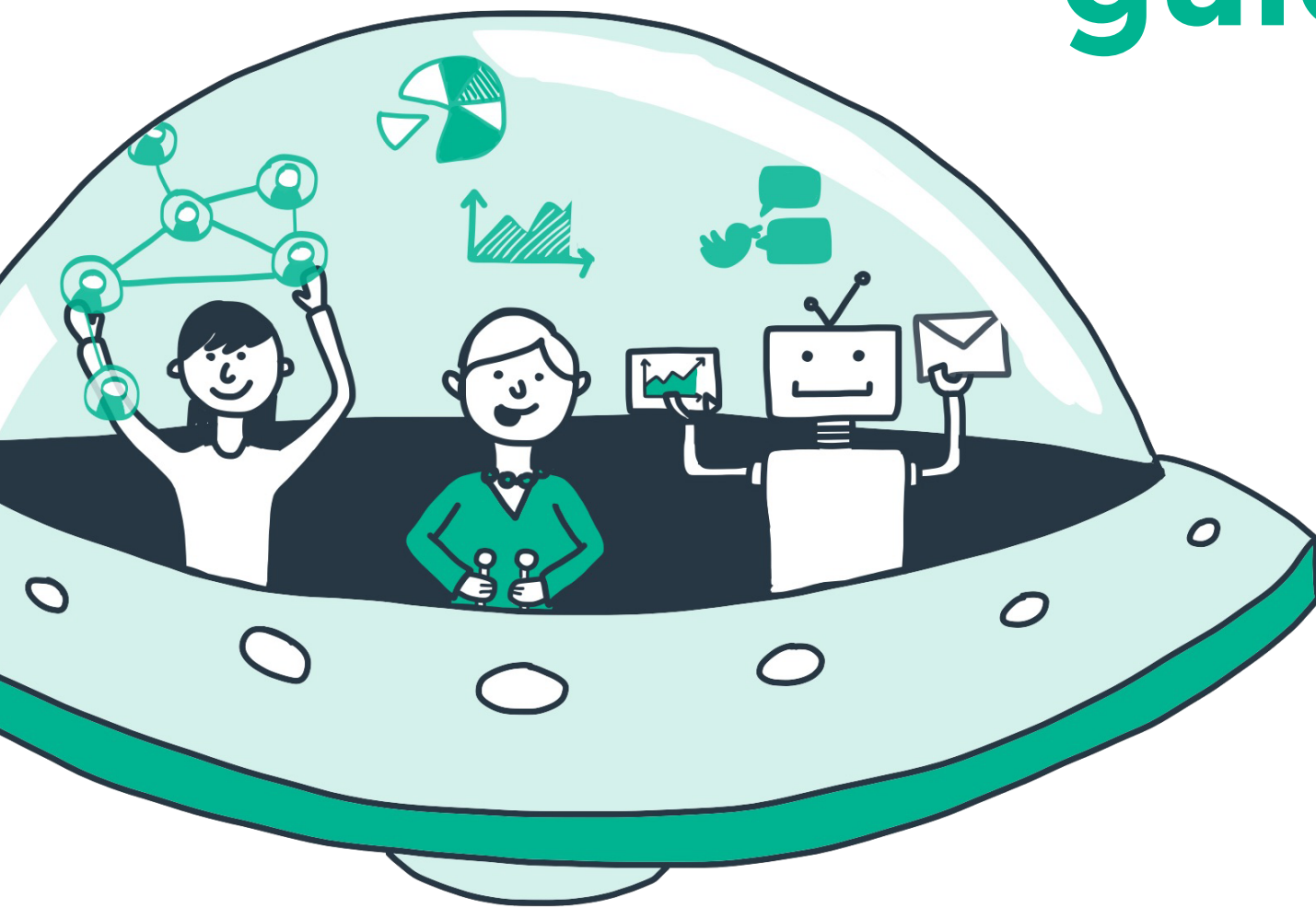
Workflow waste happens in all organisations.

**Let's look at how
communication teams can
improve workflow, reduce
waste, and create more value
for their customers**



You can apply the tips to other sectors

Get the full 35-page
guide:



How to
**MODERNIZE
WORKFLOW**
in *pr* teams

5 STEPS TO **improve team workflow**

1/ Map the workflow

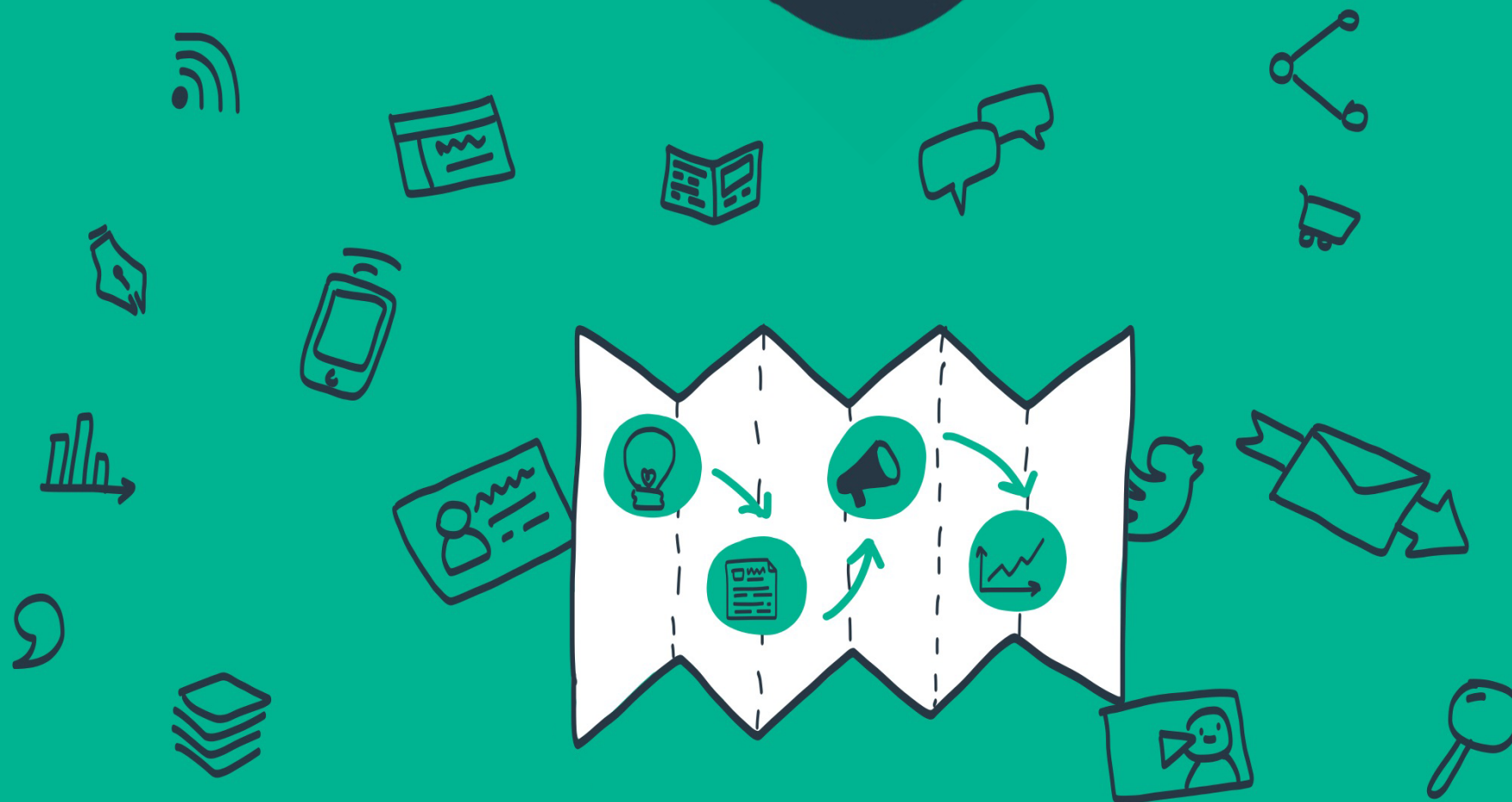
2/ Choose experiments

3/ Assign project teams

4/ Invest in automation & tech

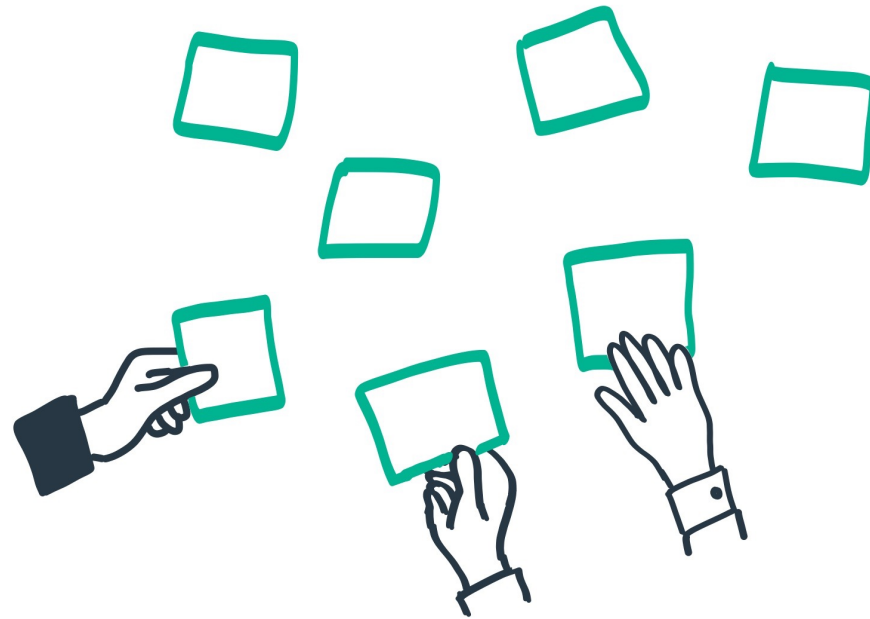
5/ Foster a learning culture

1/5



Map the workflow

Create shared understanding about the processes in your organisation

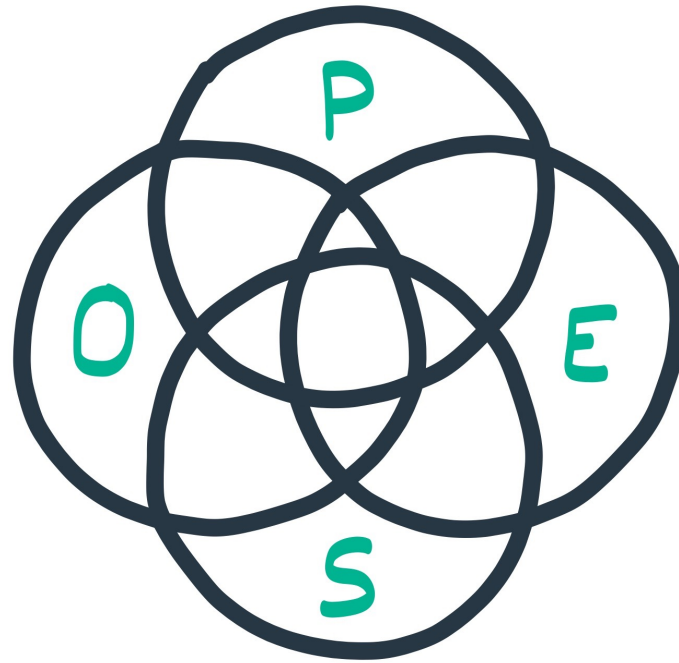


Brainstorm visually

Do an introvert-friendly brainstorm with C-suits, managers, junior executives,...

Make it fun and open with the Post-up technique.

Post-up tips »



Use models for structure

Guide your thinking by using a system that everyone understands. It helps to make sure you're thorough.

Do you know the above model?

IT'S THE PESO MODEL

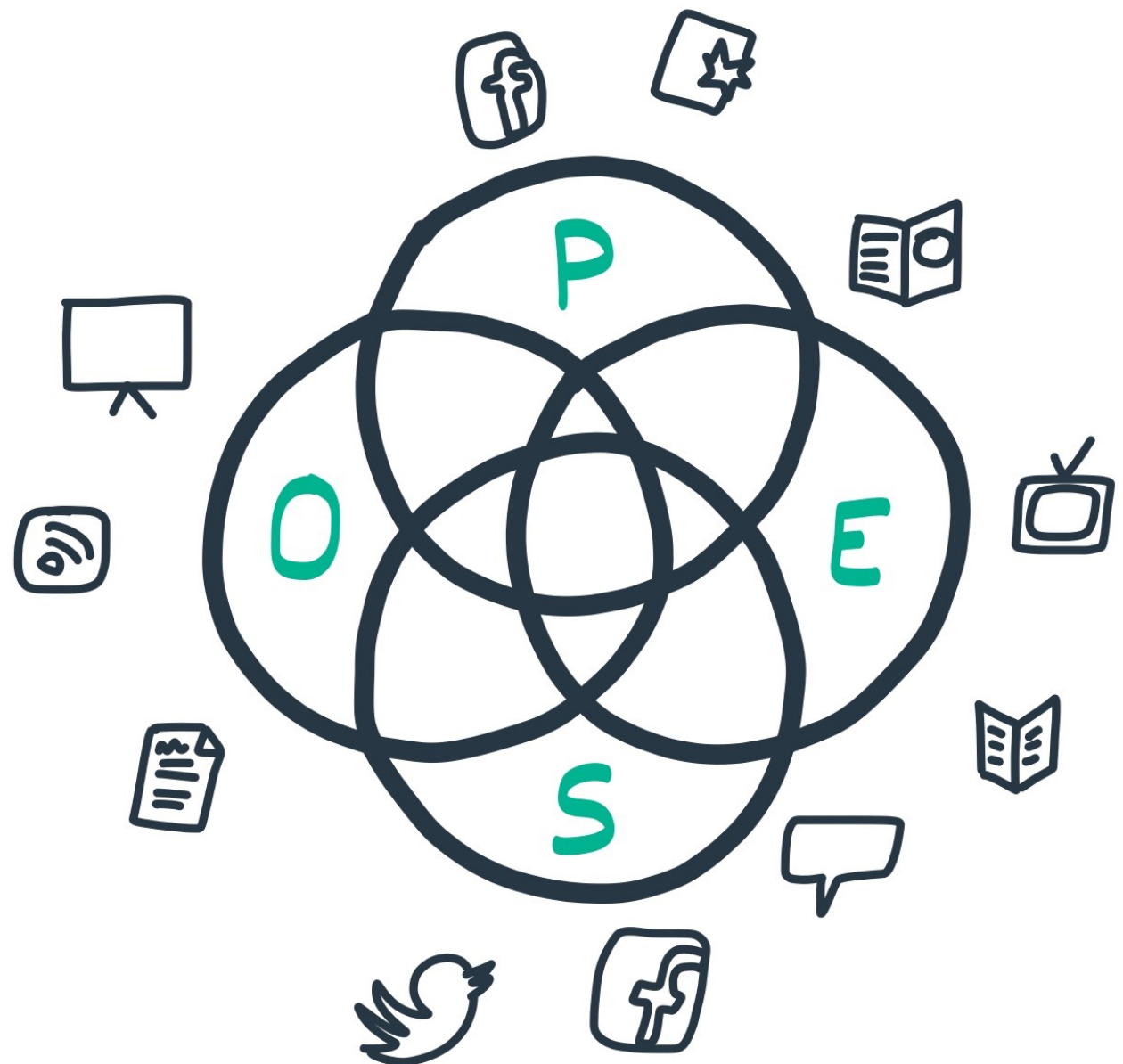
A popular model to get a complete overview of the work communication teams can do.

Paid media

Earned media

Shared media

Owned media



[More about PESO »](#)

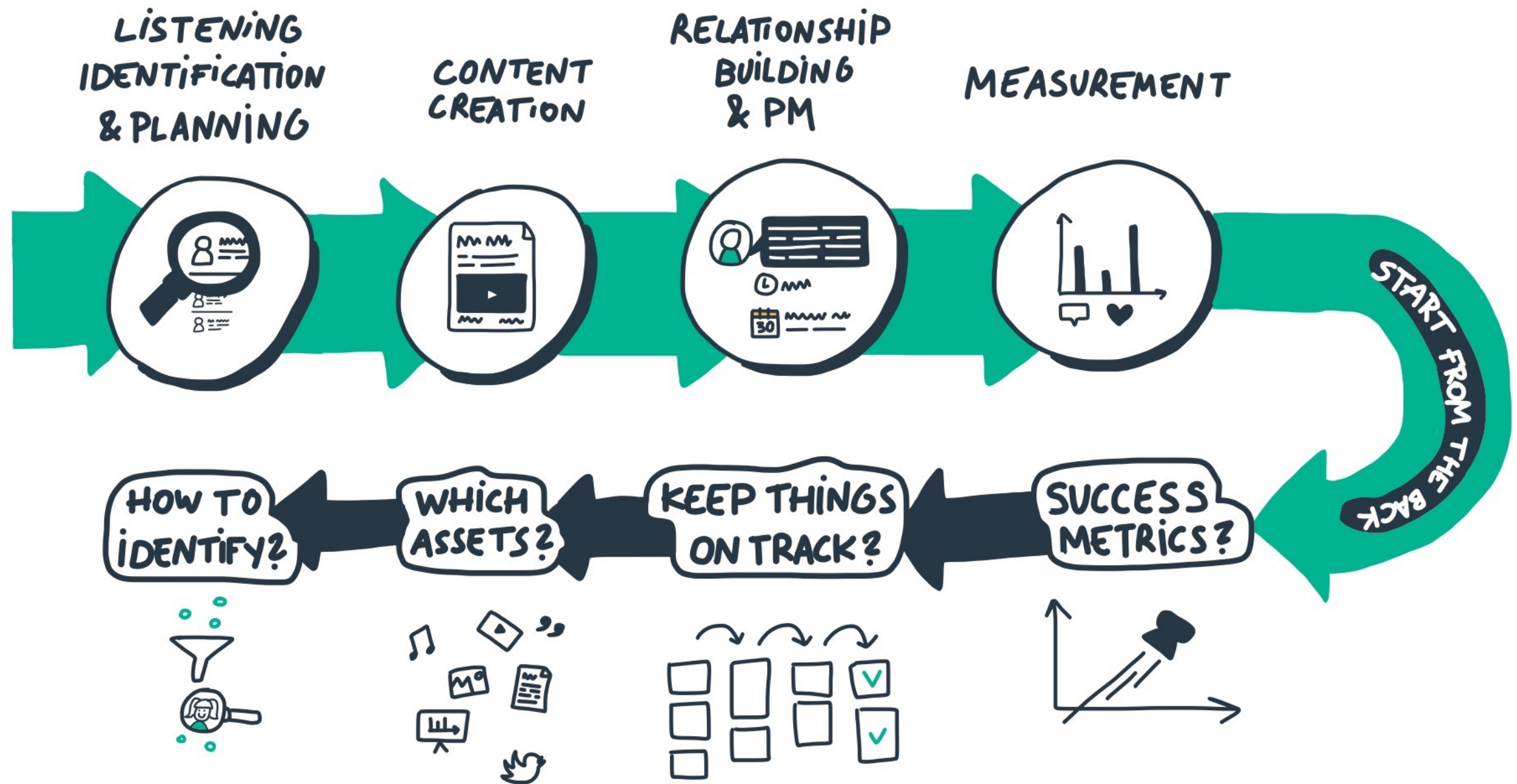


Tackle one workflow at a time

In communications there are different workflows for crisis communication, media relations or real-time campaigning.

Start with one.

EXAMPLE MEDIA OUTREACH WORKFLOW



Lay out the flow and track back your steps.

Break it down even further:



RESEARCH
ONLINE
CONVERSATIONS

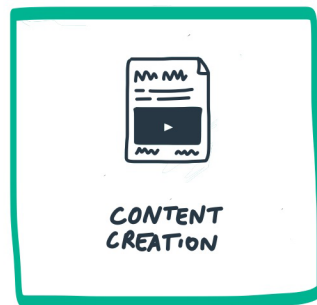
WRITE
BRIEF

LIST
DELIVERABLES

SET
KPI'S

OUTLINE
INFLUENCERS

CHECK
W/ CLIENT



RESEARCH
KEYWORDS

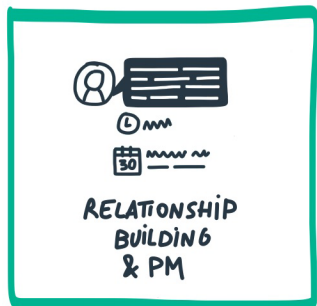
DRAFT
PRESS RELEASE

PROOFREAD

SHARE &
REVISION

DESIGN
VISUALS

WRITE
SOCIAL
UPDATES



FIND
CONTACT
IN EXCEL
LIST

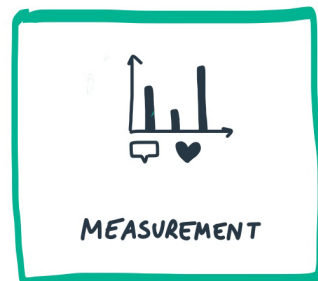
COMBINE
W/ CLIENT
LIST

FIND NEW
CONTACTS

REVIEW LIST
INTERNALLY

REVIEW
W/ CLIENT

RESEARCH
TOP LEVEL



TRACK
TWITTER
MENTIONS

TRACK
NEWSLETTER
SIGNUPS

FIND
CLIPPINGS
W/ GOOGLE

GET PRINT
CLIPPINGS
FROM VENDOR

COMBINE
ALL COVERAGE
IN .PPT



Document it all

This overview can act as the basis for training new hires.

Invite a team member that didn't contribute to the process for a review to make sure the writeup is clear.

Like the presentation so far?



Tweet it now



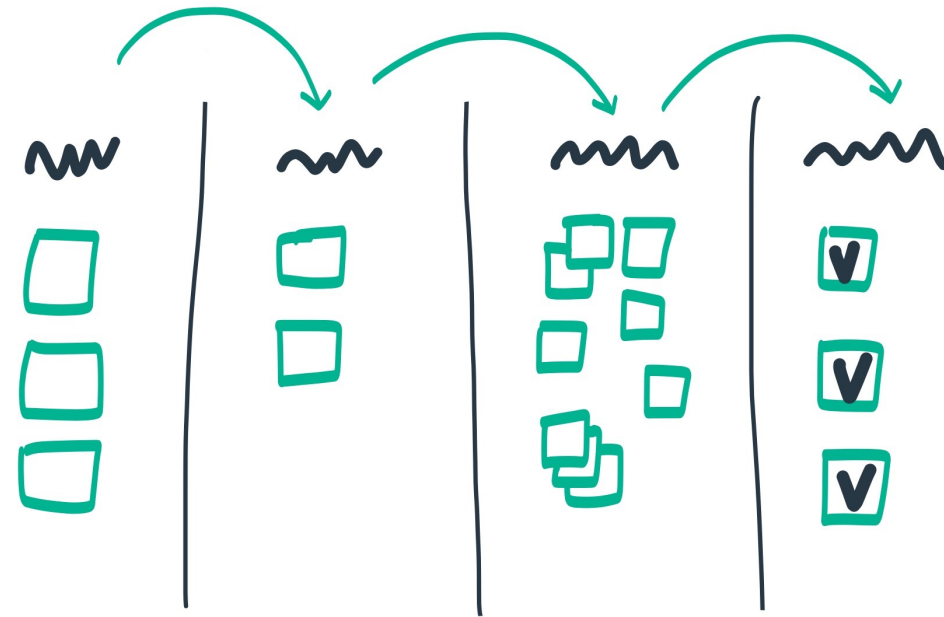
Share on LinkedIn

2/5



Choose experiments

Discover which elements need improvement
and track your progress



Track throughput

You can't improve what you don't measure.

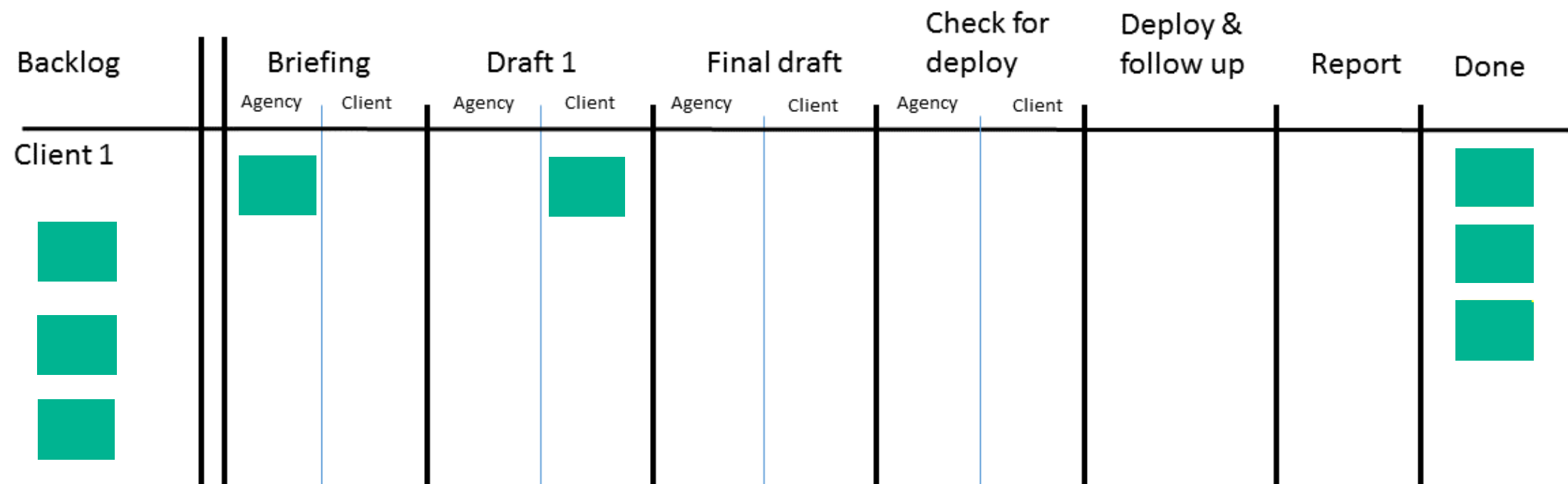
Expose your work progress with the whole team in a visual and collaborative way.

Learn how to do this with the *Kanban* framework.

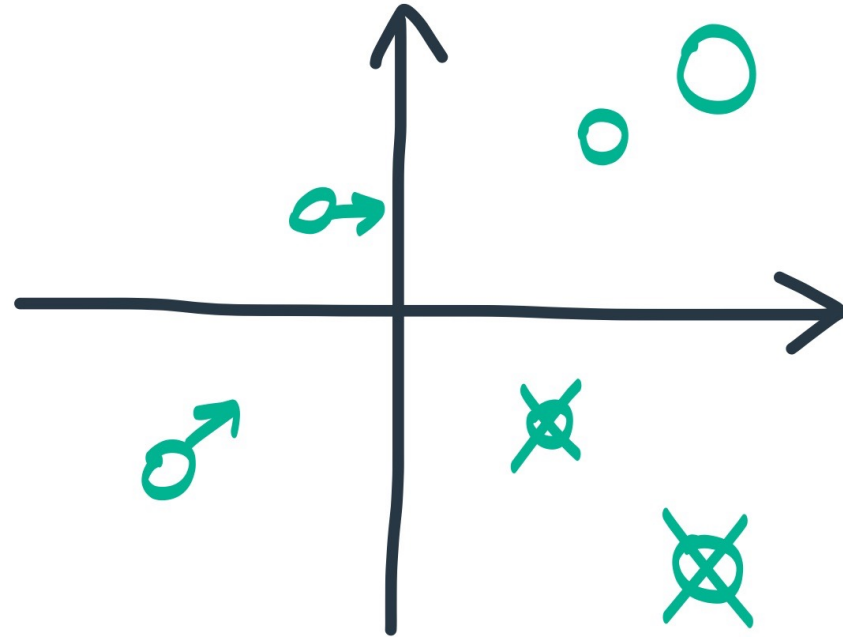
KANBAN?

A manufacturing framework developed in Japan by Toyota in the 1940s. Many software development teams have now adopted it too.

This is the Kanban board of PR agency FINN in Brussels:



How agency FINN uses Kanban »



Map customer value

Could you create more value for clients in less time?

Map all tasks on an axis like depicted above.

Focus on removing waste in your process to create more time to sell to other clients.



Find failures

Where is the team messing up?
Is work getting sent back?
Are clients or partners complaining?

EXAMPLE FAILURES

- **Client asks rewrite of press release.**

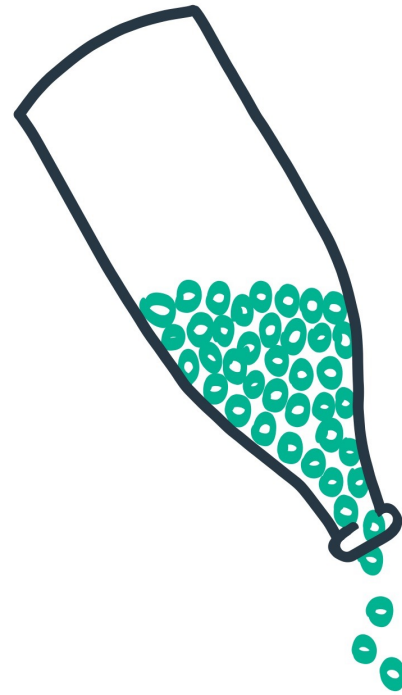
Reason: team failed to get briefing and draft approved.

- **Media complains about too many and irrelevant press releases.**

Reasons: team has no overview of who is getting pitched. Contact database isn't up to date.

- **Coverage isn't secured as initial pitches aren't being followed up.**

Reasons: No one is tracking who pitched what and taking ownership of follow-ups.



Find bottlenecks

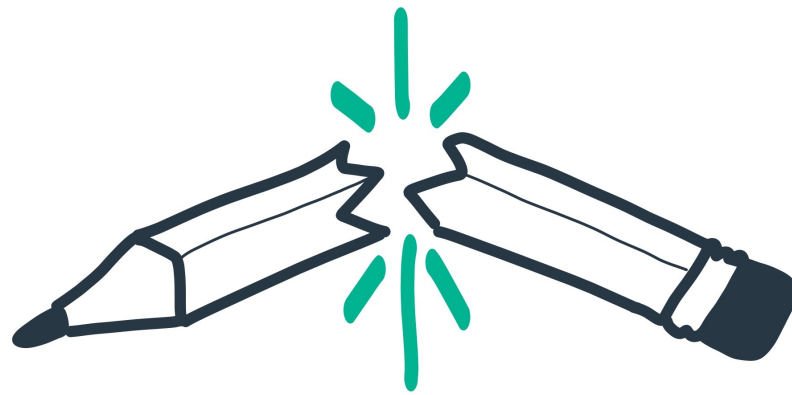
Where is work piling up?

Are people waiting?

Are there unnecessary intermediaries?

EXAMPLE BOTTLENECKS

- Waiting for team to update outdated contact list spreadsheets.
- Waiting for designer to create social media visuals.
- Waiting for client to sign off influencers you pitch.
- Waiting for client to approve social media updates.
- Waiting for client to upload assets to their newsroom.
- Waiting for client to approve extra budget.



Find frustrating tasks

Which tasks doesn't the team like doing?

Highlight the most boring and repetitive work.

EXAMPLE

Welcome to Excel hell

A while ago I visited a top PR agency in London. They track the amount of twitter followers of influencers.

Every week a junior plows through an Excel sheet:

- Copy/paste twitter handle of a contact
- Surf to the twitter profile
- Add the follower count to Excel sheet
- Rinse. Repeat.

Utter madness.

And probably not why he got a PR degree.





Choose experiments

Decide on which waste you'd like to reduce.

Will you take people out of the equation, create different deliverables, or use different tools?

EXAMPLE

Media outreach workflow

PR pros spend ridiculous amounts of time in Excel to share multimedia stories with influencers.

- Updating contact info
- Merging contact lists
- Exporting email addresses



✓ **Low value**

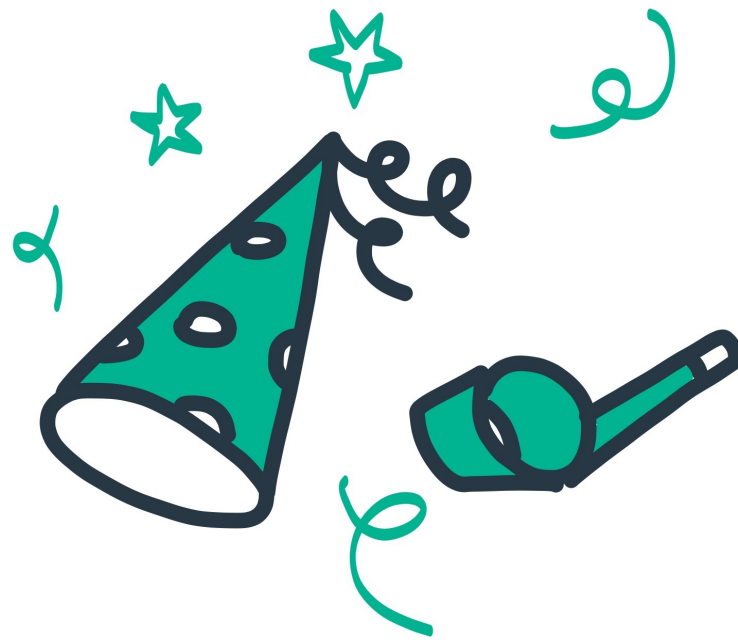
✓ **Error prone**

✓ **Frustrating**



Assign project teams

Do a test project with an compact team to learn
fast what works



Do a low-risk pilot

Test a new workflow before committing to it.

Choose a safe project where failure is ok.

Organising your next office party for example.



Assign compact teams

Solve the problems bottom-up. Small and agile teams will move faster and will learn faster what works.

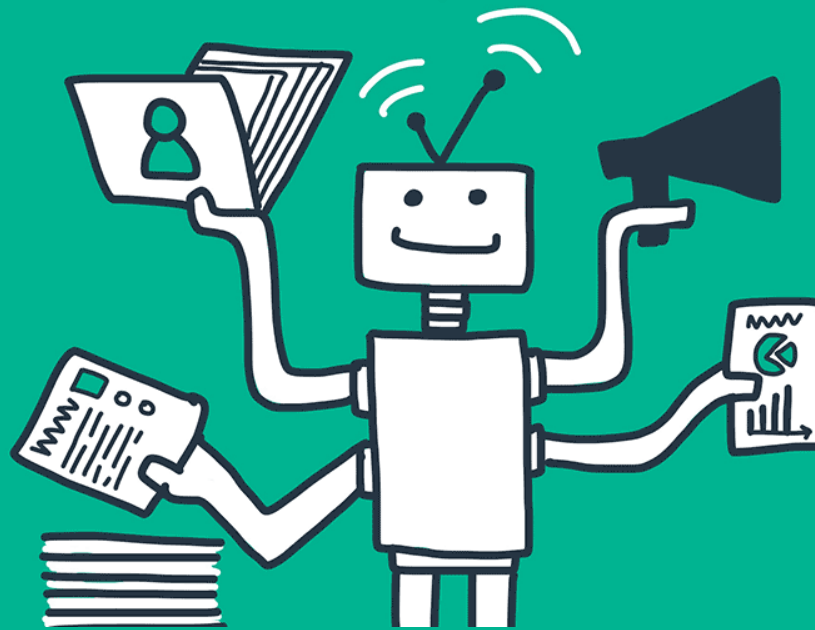


Invite a geek

Include technical colleagues.

The more diverse your project team, the better the results. A left-brained backend coder or systems administrator will bring a different perspective.

4/5



Invest in automation and technology

Empower your teams to test software



Look for software tools

There are hundreds of software solutions for knowledge worker teams.

A good place to start is software portal Capterra:

COMMS TEAMS:

**Check PRstack,
a crowd-sourced overview
of 250+ PR tools
and 48 guides**

PRstack »





Speak with software vendors

There are hundreds of software solutions for comms teams. Vendors will be more than happy to show their product.

BOOK AN ONLINE DEMO

**It takes only 20min to assess
software**

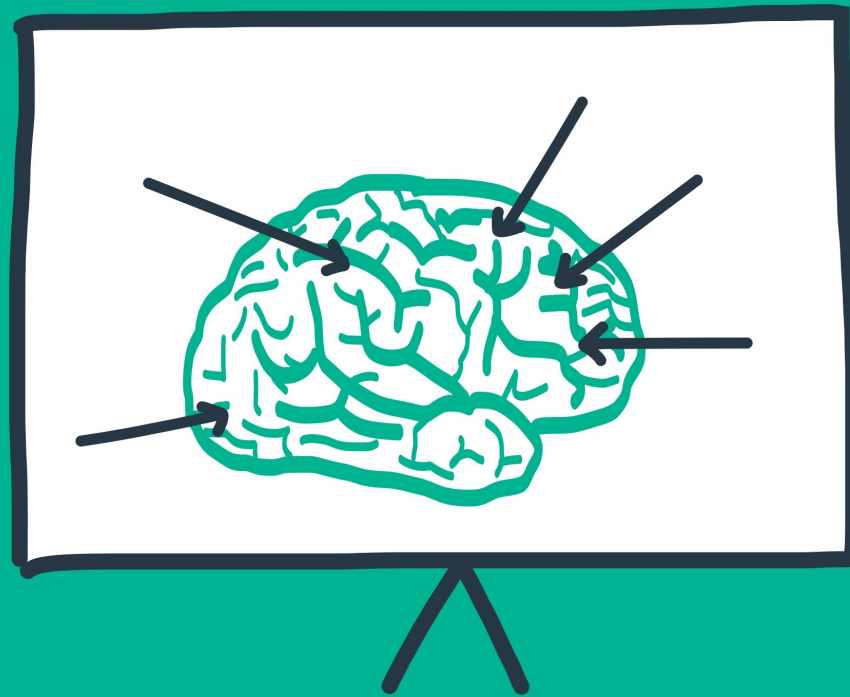
My team at outreach
software Prezly helps
comms team get out of
Excel hell.

We'd be happy to give
you a demo.



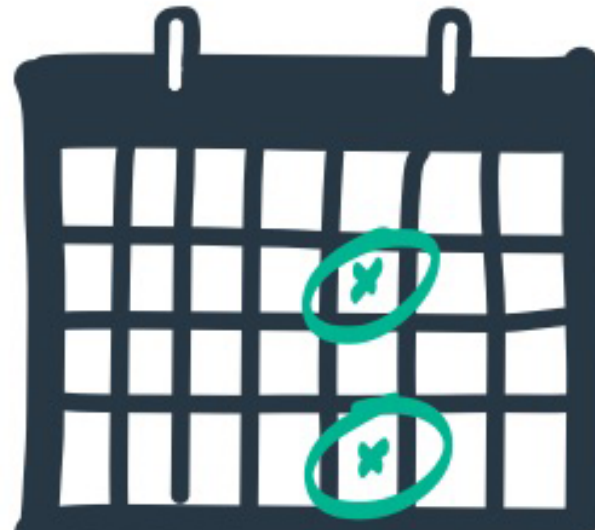
Discover Prezly »

5/5



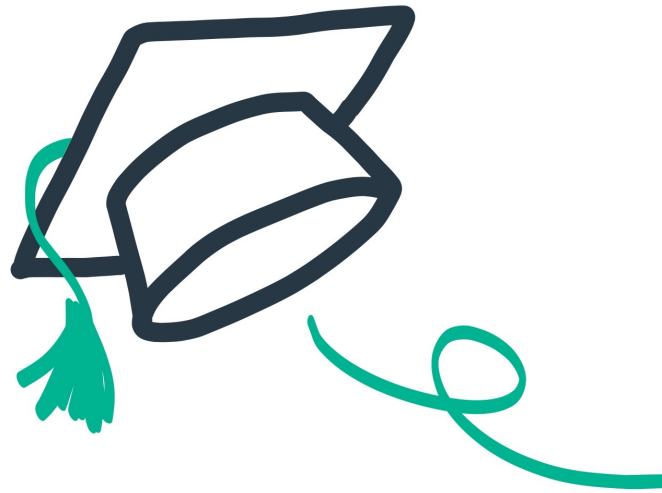
Foster a learning culture

Improving workflow is a never-ending process.
Set your team up for continuous learning.



Plan learning moments

Share what the teams are learning regularly.
Put it on the agenda. Leading PR agency Battenhall has
learning lunches every Thursday.



Educate the team

Are project teams convinced of a new workflow?

Document it and teach it to the entire team.

Show them the value and train them.



Book an expert workshop

Increase your chances of success.

Paying an expert will make sure you invest the time and that you follow through.

I RECOMMEND THESE Communications advisors



Stuart
Bruce



Philippe
Borremans



Frederik
Vincx
That's me :)

5 STEPS TO **improve team workflow**

- 1/ Map the workflow**
- 2/ Choose experiments**
- 3/ Assign project teams**
- 4/ Invest in automation & tech**
- 5/ Foster a learning culture**

Print-friendly version on next slide

1/ Map the workflow



2/ Choose experiments



3/ Assign project teams



4/ Invest in automation & tech



5/ Foster a learning culture





How do you improve your workflow?

Share it in the comments or tweet me [@fritsbits](#).

Liked the presentation?

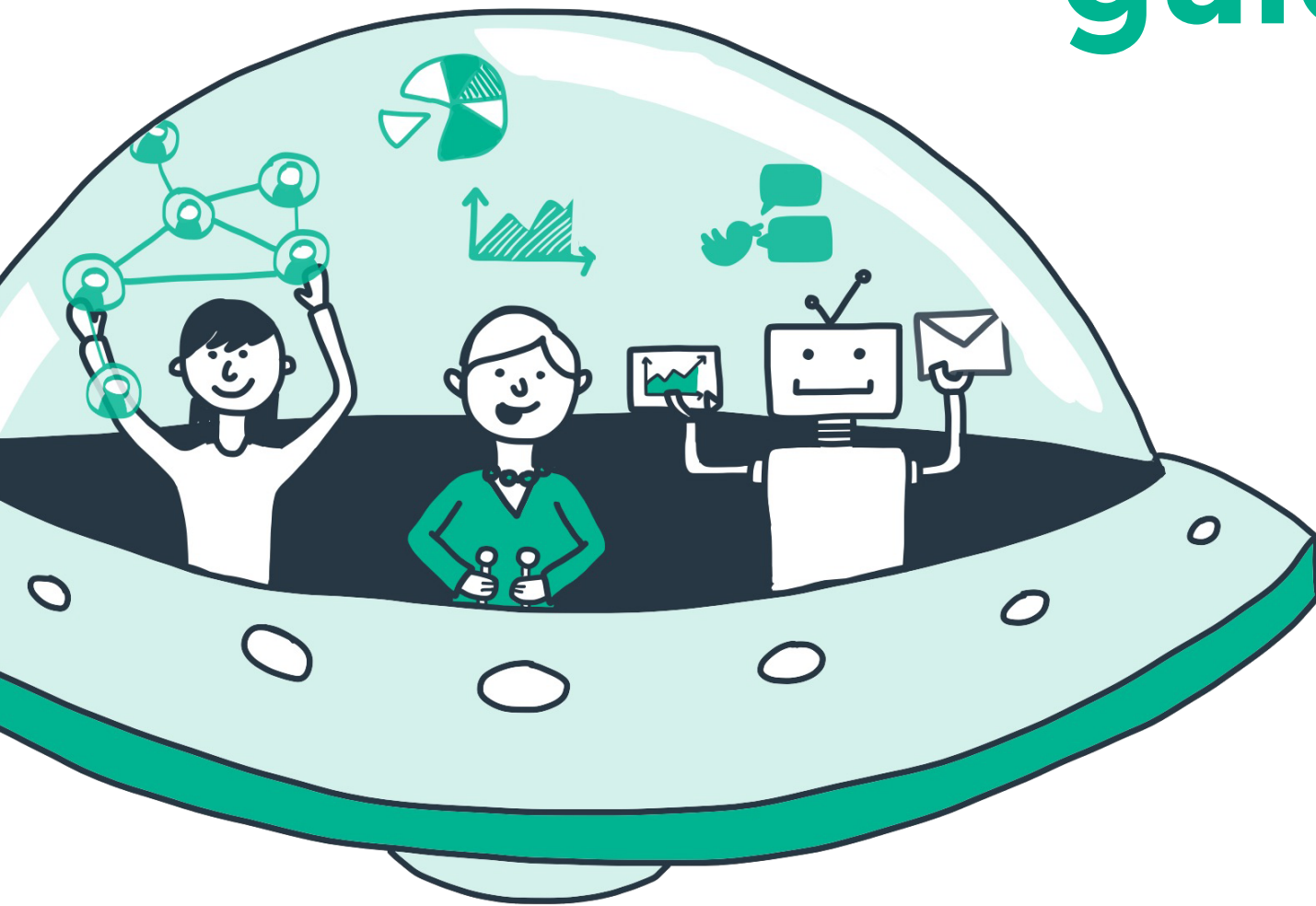


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