Aspiration Workflow Inventory Template
User Notes

The Aspiration Workflow Inventory Template is provided to support enumeration of tasks that nonprofit and foundation staff members repeat in their ongoing duties. This is done with an eye toward improving the way that technology supports organizational processes and operations.

The workflow inventory is usually performed for multiple reasons:

- To enumerate and clarify recurring tasks that organization staff perform;
- To assess the degree to which each workflow is properly supported by associated software tools;
- To scope and define requirements when new technology is being acquired and implemented;
- To drive discussion about improving and better supporting any and all of the above.

The associated template includes a couple of examples, one which is silly and one which is closer to real. Please delete those before filling in your actual workflows.

To document each workflow in your job role, please provide the following information.

Workflow Category: Indicate the category of tasks into which this workflow falls, such as "Public Relations", "Online Communications", "Membership Management", "Grants Administration", etc.

Workflow Name: Describe the task, making sure to include a verb and noun. For example enter "Draft Press Release" or "Publish Press Release" instead of just "Press Release". In addition, avoid overly general workflows; "Post event on web site" or "Post blog entry on web site" are much more useful workflow names than "Post content on web site".

Trigger(s): Indicate the event(s) that cause the workflow to transpire. Types of triggers can include:

- Explicit request, either from manager, other organizational staff, or external party
- Date/time, such as weekly, monthly, annual or other recurring calendar-driven tasks
- Arrival of asset, such as contribution from a community member or submission from the web site
- Condition met, such as "Project completed", "Storage full" or "Workflow X completed"

Tool(s): List the software tool or tools that you utilize to complete the workflow.

Output(s): List any asset(s) generated by the process, such as a Press Release, or Weekly Report, or Web Page.

QoE: This stands for "Quality of Experience", and refers to how well the software tools employed in the workflow support the process. Please categorize the quality of each workflow as one of the following:

- High
- Medium
- Low

Comments: Please elaborate on the Quality of Experience or anything else noteworthy about the workflow, with a focus on flagging areas for review and improvement.

What to Include

It is not required or necessarily productive to inventory all workflows:

- Note that for technology planning purposes, you don't need to inventory workflows that are not technology mediated, only those that are. Including workflows like "Take out the trash" or "Water the office plants" just puts noise into the documents. Unless you are using enterprise software to accomplish those tasks :^)

- You can usually exclude "personal productivity" workflows, such as "type a document" or "prepare a powerpoint presentation", as those are not enterprise-level tasks that require enterprise-level software analysis. On the other hand, "collaborate on budget" "co-author report with other staff" are definitely workflows worth including.

Conclusion

This workflow inventory model is a work in progress for Aspiration, and we welcome feedback, questions, and suggestions on the template and the overall process.