

Workflow



Process Automation Playbook for Google Workspace





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01.



Gmail + Google Sheets : The original chaos



Nearly every workflow is initially managed through email. Take a leave request, for example. You send your manager an email, she replies with approval. You forward the email to HR for record-keeping. Done.

Email is where almost all of our communication and collaboration happens, from quick lunch plans to huge project proposals. It can be a great way to manage human-centric workflows because all of your contacts are instantly available.

At its most basic level, a workflow is a set of data + a path for the data to follow. In this situation, the data comes either from the email itself or from an attached spreadsheet. Spreadsheets allow for unlimited data collection and a common place to store the data.

Offices also tend to first graduate to spreadsheets when handling multiple items in the same workflow. If HR handles a lot of leave requests, they may first grab your data from your email and manually copy it to their Google Sheet where they list out individual requests for later processing.



When Gmail + Google Sheets work great

Gmail + Sheets is the most basic way to manage workflows. It's quick and doesn't take any time to set up. Gmail also allows you to instantly change or alter a workflow. Forwarding the data to new people and adding others to the path is as simple as typing their names.

It's a great choice in these situations:

- All the tasks are done by humans and wouldn't be better handled by a system
- Documentation and audit trails for individual items in the workflow are important, but not essential (Searching for email trails can work, but has its limits)
- The path for the data isn't set, or often changes in unpredictable ways
- The process only occurs occasionally – not more than a few times a week
- It is a one-time, ad-hoc process that may not be repeated again

When chaos comes in

Although it is very agile, using email and spreadsheets to manage a workflow often creates a lot of chaos and confusion. Here are just a few ways that most business users start to see cracks in email's ability to manage workflows.



No tracking items

Once an email leaves your system, there isn't a built-in way to track if it has been completed by the next person. You have to manually follow up on each individual item which would be tedious and frustrating.



No reporting or analysis

Emails can't help you with a report on how well an entire process is flowing. If you want to know how efficiently your service requests are handled, you are stuck looking through your history for old emails.



Structuring complex items

With email, it is extremely hard to track complex processes like invoices. Critical calculations like money already paid and money yet to be paid can be easily missed, giving room for errors and unwanted risk.



No setting permissions & visibility

You may not want everyone on the path of the workflow to be able to see or edit all of the data in your spreadsheet or email. Or may want some data to be read-only or editable. This is impossible to do with email and spreadsheets.



No data validations

Because emails and spreadsheets are very free-flowing, it is hard to ensure that all the required data is present and in the right format. You might end up wasting time sending emails back and forth for additional information.



Encourages manual data entry

Processes like reimbursement requests are tedious, time-consuming and error prone as each item must be manually entered into the finance software. Email + spreadsheets are not the best options here.

02

Gmail + Google Forms : The nightmare continues

A combination of email and spreadsheets works great for quick, undefined workflows when documentation is only mildly important. But one of the biggest downsides is that you can't validate the data and you must manually enter information into spreadsheets.

This leads to your second option to manage your workflows - Google Forms.

Google Forms is a good option to turn to when you have trouble collating data from different sources in a standard format. For example, if you are trying to collect peer review data among colleagues in a team, using email makes the process very cumbersome. If you made a common Google Sheet for everyone, others could see the entries, and their responses might be biased.

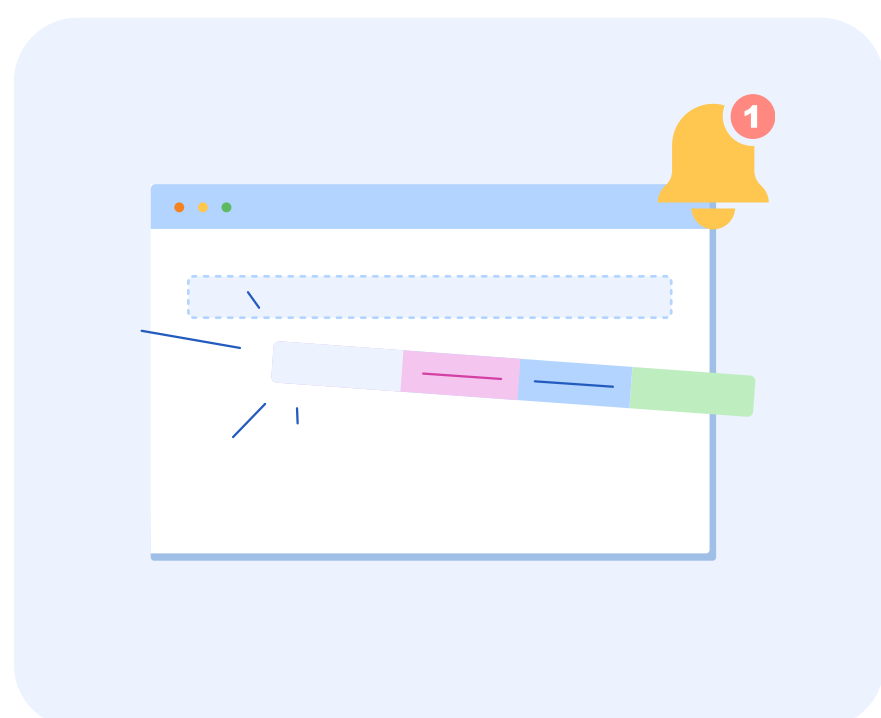
Google Forms gives you much more control over collecting data. After a user fills out your form, all the data is immediately parsed into different fields which makes it much easier to process. Since it captures and stores your data outside of your email, you don't need to go digging through your email history to find a request from a month ago. Even if someone new is added, you don't have to forward a bunch of emails to get her caught up. All you have to do is add permissions to your sheet and share the same- all of the information is in one place.

When Forms is the best option

- You need your data broken up into very specific, validated units
- You want to reduce the manual transfer of data from an email into spreadsheets
- You want to see all of the data for each item of your process in one place
- You want to reduce the manual transfer of data from an email into spreadsheets
- You have a simple workflow with many submitters and only one receiver

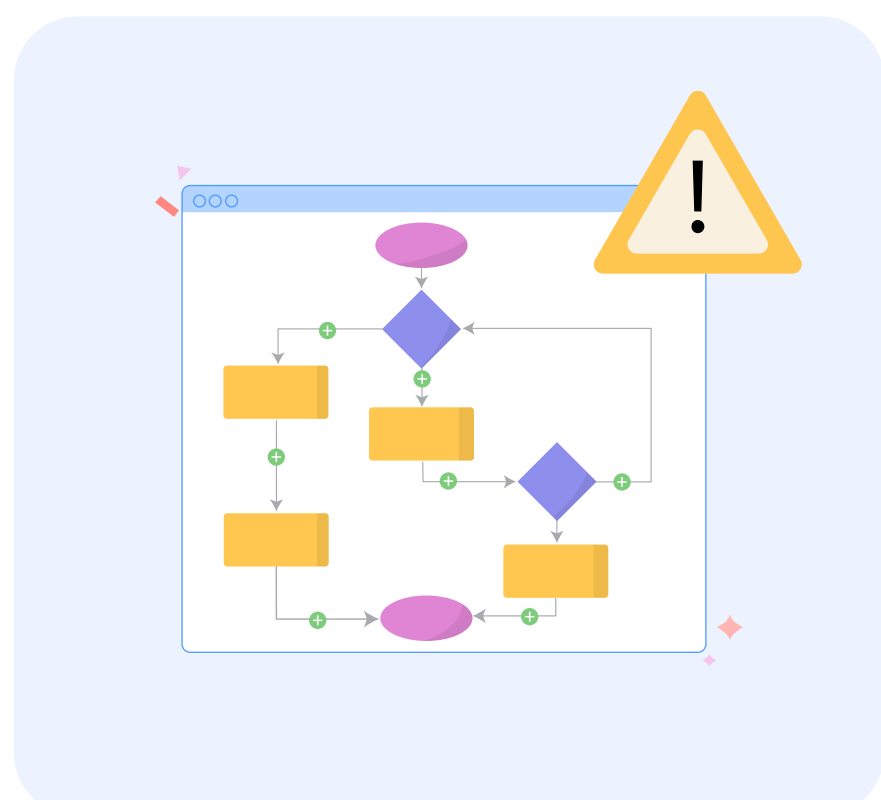
Where Forms fall short

Despite the advantages over email, using Forms to manage your workflows still leaves a lot of holes.



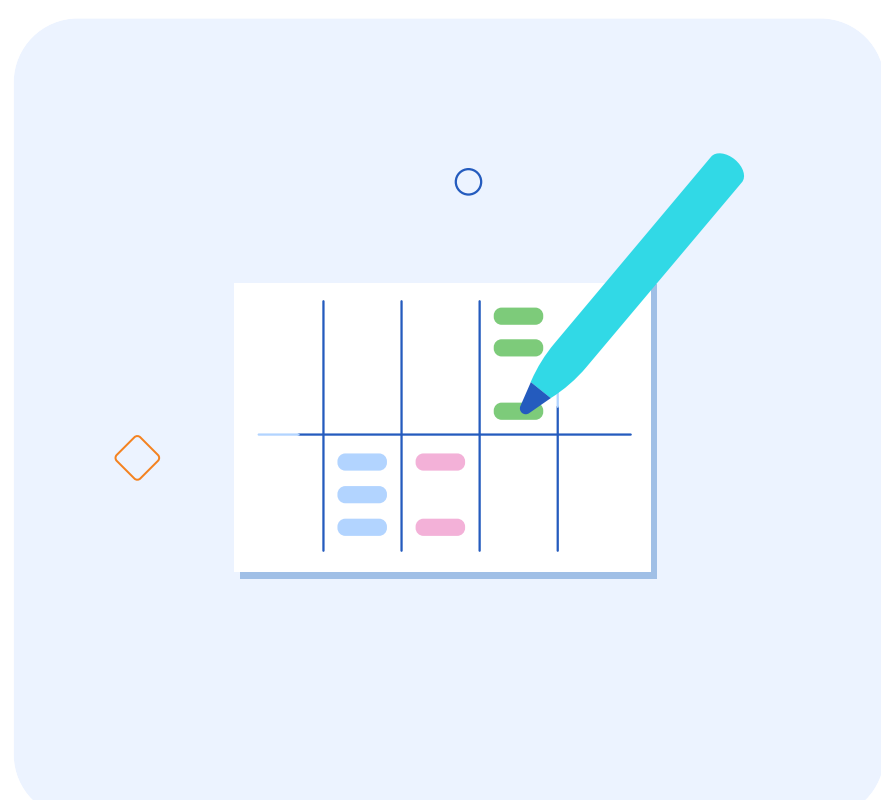
Isolated notifications

You can enable email notifications when new entries are submitted in Forms, but this only goes to the creator of the form and not anyone else.



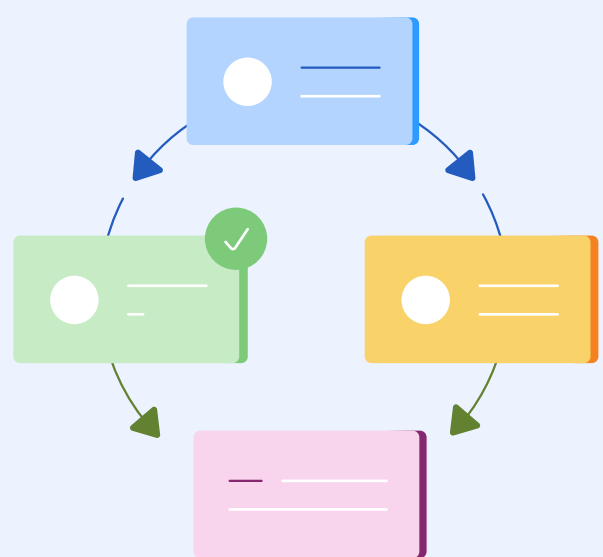
Zero workflow

Forms are good for the data part of your process, but not the workflow. Only the first step is automated and there isn't a way to build in any step after that.



Limited permissions on the Sheet

You can't restrict certain fields to be editable for some people but view-only for others. When editing access is given to someone, they can access all of your data for every item.



Data dump

It is very hard to navigate your spreadsheet when you have dumped all the data in one place. Also, not knowing what stage all of your items are in can be too overwhelming.

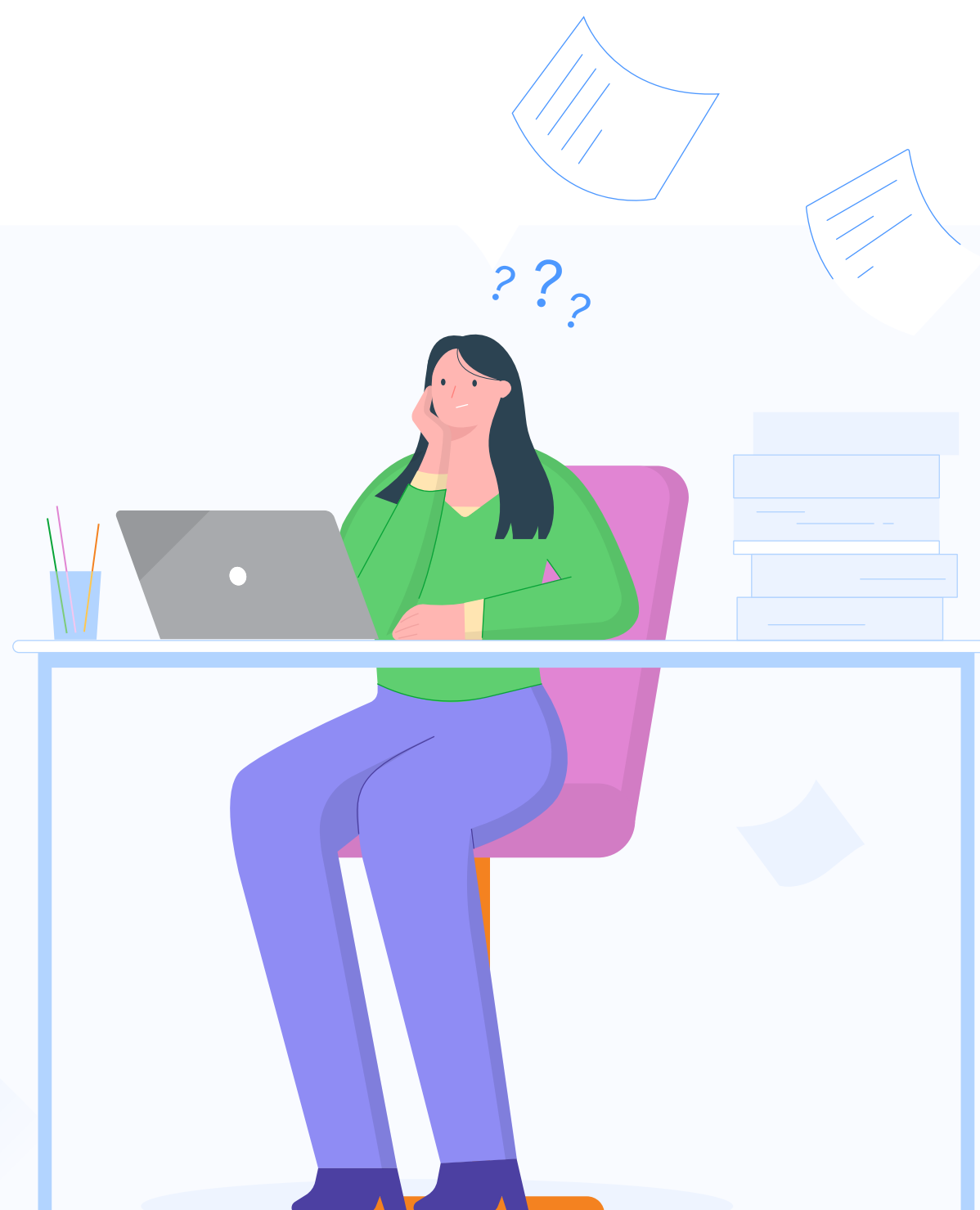


Tracking nightmare

When your form is filled out and timestamp is created, you are on your own. There isn't a built-in way to track each item as it goes through other steps.

If only I could get the systems to talk!

Google Forms adds a lot of functionality to capture data for your process, but it really doesn't help your workflow very much. Next, we'll look at a simple way to get your systems to talk together and add an additional automated step.








03

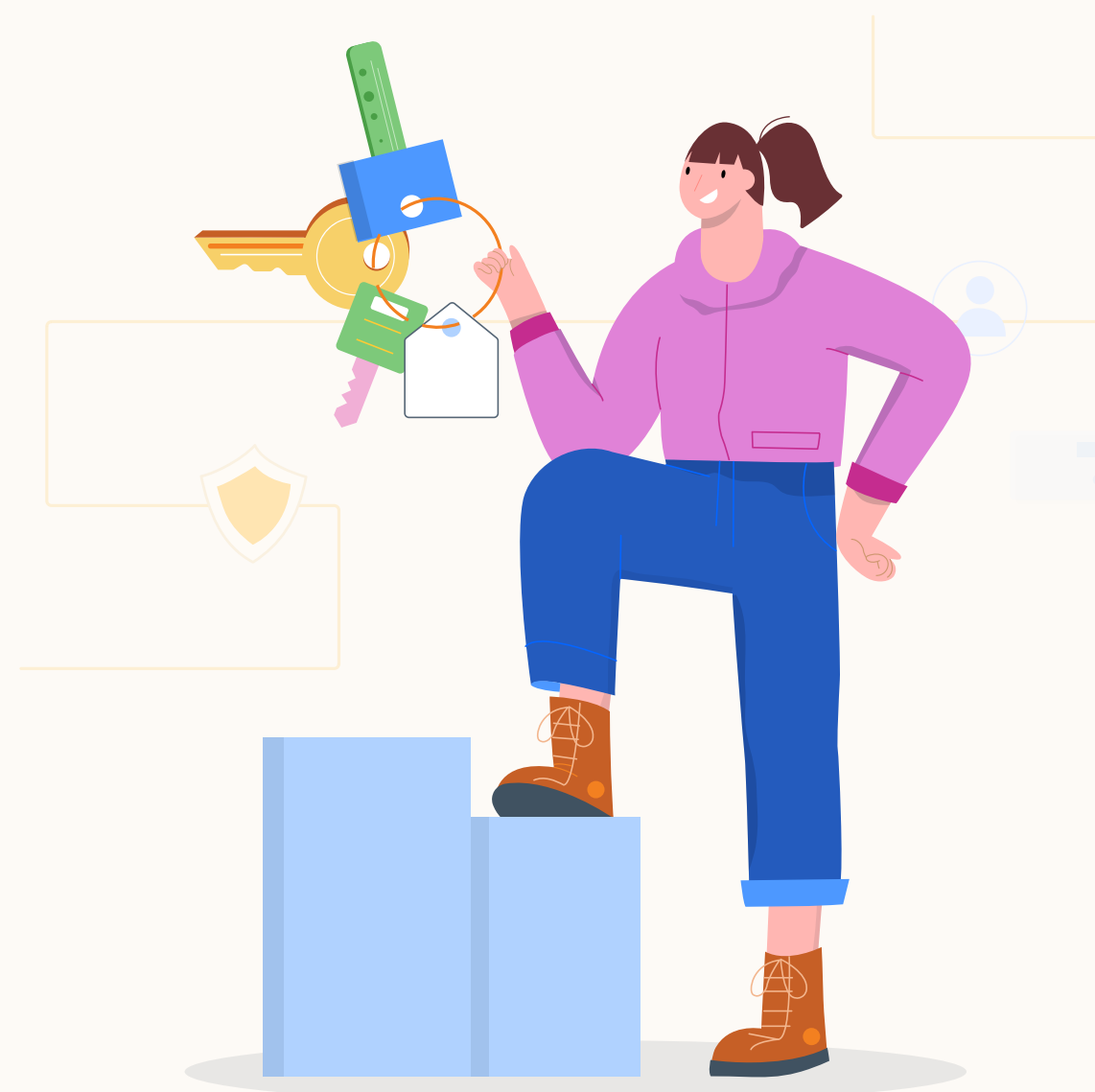
Google Apps Script : Let the machines do the talking

Google Forms can add significant functionality to how you collect and store data for your workflow. However, it really doesn't address any workflow problems and leaves you needing something else. And so, we turn to Google Apps Script.

Google Apps Script lets you add small lines of code to any Google App like Sheets or Docs to pull or push data between that app and many other applications. Apps Script is good for system-to-system data flow integrations, whether internal or external. For example, when someone submits an online form on your website, you can trigger an email response to them. Or a calendar request can be generated after data is received from an online event management system.

Benefits of Apps Script

-  Convert an Android app into an Android add-on.
-  Interact with other Google services.
eg. AdSense, Calendar, Drive, Gmail etc.
-  Add-ons to extend Google Docs, Sheets and Forms - Publish them in the Add-on store.
-  Custom menus, dialogs & sidebars to Google Docs, Sheets & Forms.
-  Custom functions for Google Sheets.



Why do most people stay away from Apps Script

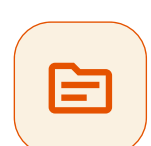
Google Apps Script tends to be a black box among business leaders, mostly because it seems so technical. It looks like code, and it is code, and that is enough to scare many people away. However, if coding is a new language, doing app scripts is like learning the alphabet. It can take time to do it on your own and will require a decent amount of learning and tutorials if you are starting from no technical knowledge whatsoever. You will need to learn about different Google APIs and how to execute steps correctly.

The shortfalls of Apps Script

As great an option as Apps Script is, it still leaves the door open for future frustrations. Apps Script will do the job for simple data flow integrations, but it doesn't even move the needle when it comes to creating a complete workflow.

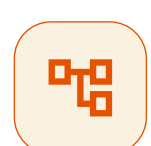
- Apps Scripts are very tedious to debug and you will likely spend more time fixing them.
- Audit logging is not straightforward, and triggers aren't always consistent.

There are other limitations of Apps Script as well.



Data integrity

If you have the same set of data across different sheets, each sheet needs to be updated. This creates a problem because there is no central, master data.



Only linear workflows

You can string several Apps Script together to create an ad-hoc workflow, but it must be in sequence. It becomes extremely complicated to create a conditional workflow.



Maximum execution time

If the application you are trying to connect to takes extra time for data manipulation, your maximum execution time will be limited.



Recording approvals

To maintain approval hierarchy and manage workflow states, you will need to use JSON, which is a big step for someone who doesn't already know how to code.

This is where the real problem begins

Apps Script can show you how much is possible without having to make a significant financial investment, and it can also get your creative wheels turning when you see what is possible. However..

- If you hate getting involved in code or if you highly value data integrity,
- If your workflows use conditional branching or business logic,
- If you need a big-picture view of how things are running from a single dashboard,

then Apps Script may not be the right solution for you.

In these cases, Apps Script can be a springboard to help you know exactly what you are looking for in an off-the-shelf workflow management tool like Kissflow Workflow.

04










Workflow Platform : The true savior

Workflow on autopilot

Off-the-shelf workflow platform handles the two sides of workflow management – capturing data and creating a path for the data to follow. The platform will let you create a form to gather validated data and will help you map out the sequence of tasks that needs to happen. Using workflow management platform allows you to have a fully automated process that can run on its own. There’s no checking email, spreadsheets, form submissions, or fixing broken scripts.

Few robust workflow platforms in the market also offer pre-built intuitive templates that can help you design a comprehensive workflow based on your departmental needs.

There is a template for every department

 <p>Human Resources</p>	 <p>Procurement</p>	 <p>Finance</p>
 <p>Admin & Ops</p>	 <p>Customer Support</p>	 <p>Sales</p>
 <p>Marketing</p>	 <p>Product</p>	 <p>Engineering</p>

Why people choose workflow platform



Flexibility across functions

The same workflow platform can be used by HR, finance, ops, and marketing. Because workflows are common to every part of a business, you can use them anywhere.



Tracking individual items

If you want to check the progress of a travel reimbursement through email, you had better hope you put the date in your subject line, otherwise, it will be a pain. Workflow platform will show you the status of any item you submitted and you know where in the path it stands.



Notifications, SLAs, and deadlines

The platform will make sure that each task owner knows when it is time for another task to occur. You can also set deadlines or SLAs for each task to make sure the task is completed and reminders are sent automatically.



Ease of use

Good workflow platform will allow you to change and update workflows as you need with a few clicks. Updates should reflect immediately in the workflow.



Permissions and Visibility

You should also be able to set permissions and manage access privileges to certain data. This is a big improvement over spreadsheets where it is nearly impossible to hide or make read-only specific data points inside a workflow.



Reporting and Analytics

Workflow management platform is also going to give you reports on your workflows that would have been impossible to track with other methods. See how long items take to complete, which tasks take the longest, how many items occur in a time period, and which items get rejected the most.



Human-centric

Some options are built so that any business leader can sit down and create a workflow exactly as they picture it in their head. Other options start from a programmer's mentality and map out every possible scenario.



Everything on cloud

Beyond how you access your data, a cloud solution puts the responsibility of maintenance and performance in the hands of the vendor. On-premise means you are on the line for both.



Cost-effective

The price of workflow platform can range dramatically. A full-fledged process automation solution will easily reach six digits. Some cloud-based solutions offer free models for limited users. Most cloud-based providers charge per user per month. Be sure to consider any setup and installation fees that are included as well.



Integrations

Workflow platform is often used to supplement and support your main functional software, so integrations are key. If you are already a Google Apps customer, you want to find something that is deeply connected with Gmail, Calendar, Sheets, and any other Google App you use (like Kissflow Workflow).

For most of us, workflow management platform fits the bill, the only difficult part lies in finding the one that matches your needs the best.

05

**One Unified
Platform :**
**For every business
need**

Many organizations still use legacy systems to handle their workflows. This is mainly because legacy systems are hard to replace, especially if they are used to manage important business processes in an organization. Also, there is this fear of organizations that replacing legacy systems might result in the possibility of key data getting lost or corrupted.

But over the past few years, process automation has been tremendously growing as a necessary replacement for legacy systems, promoting overall process efficiency and productivity. It's very hard to find process automation tool that delivers comprehensive features and tailor-made workflows, catering to the requirements of businesses in all shapes and sizes.

There are two major reasons why some companies can't settle for off-the-shelf workflow management solutions:

- A company needs to build the workflow framework around highly specialized or legacy software that is critical to their business but doesn't have any open APIs or integration points.
- The company requires very specific features or fields displayed for a workflow (like high-resolution satellite images based on coordinates) that no standalone workflow platform will have.

A perfect fit

Using tailor-made process automation tool helps businesses retain and squeeze out the most of their legacy software systems without making any compromise in their core competencies. It helps enterprises push boundaries in terms of team collaboration and break process silos caused by the organizational status quo.

For example, imagine a huge publication house that handles large-scale projects with dozens of processes built into each project, e.g., multiple editorial reviews, proofreading, layouts, content additions, and annotations. Such a company would need custom software that exists inside of their core business and manages the editorial process from within.

Customized workflow solutions can digitize an enterprise's static processes and allow collaboration to happen in real-time. Furthermore, customized workflow platform is built to interact with other applications in the enterprise, such as your CRM, document management tools, ERP, etc.

It's time to choose

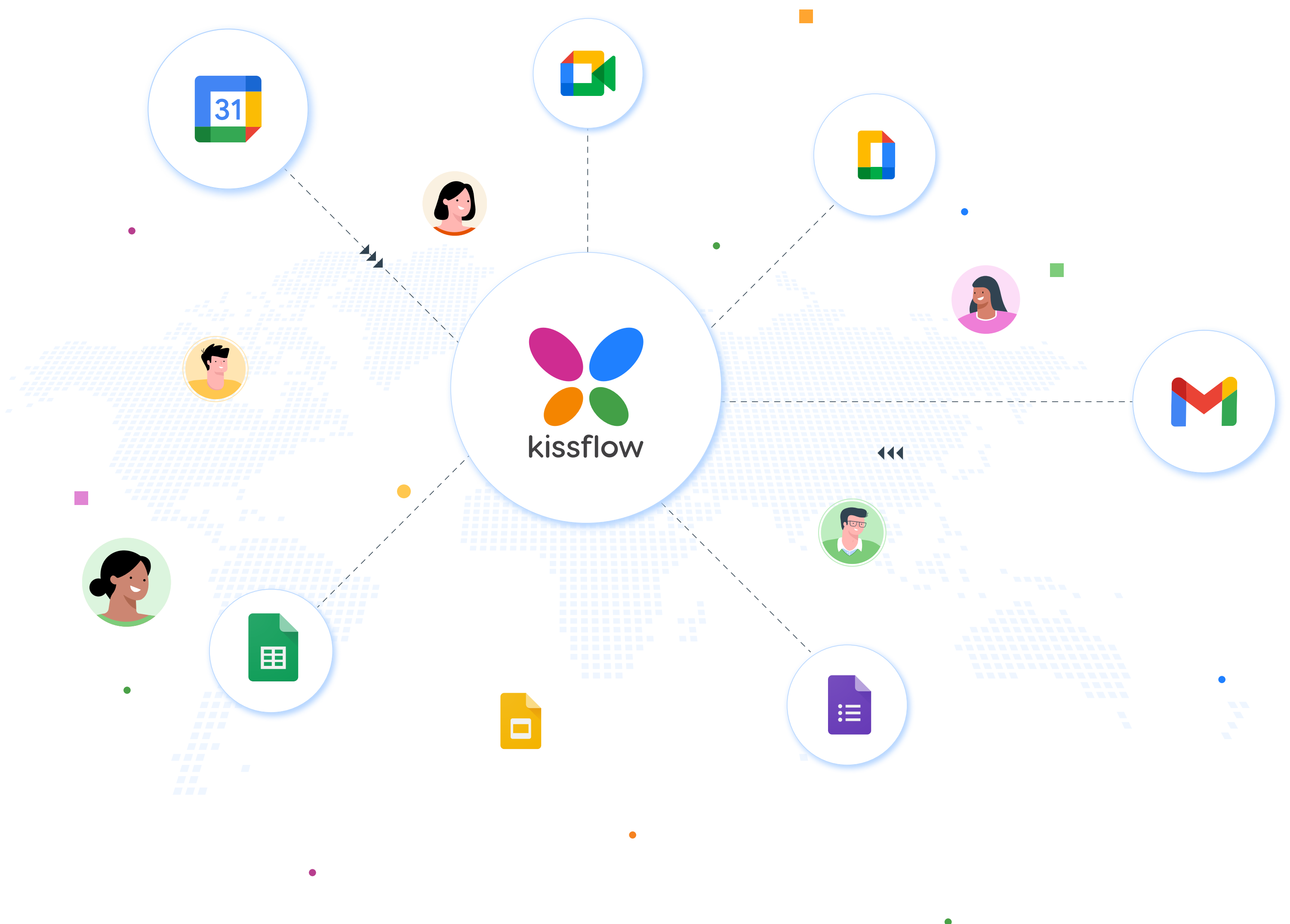
When an organization grows exponentially, its processes get heavier along with it. In such a case, mere Google Apps would be insufficient. You need a custom-configured and robust workflow management platform that allows you to seamlessly integrate with the Google ecosystem. This way, you can rest assured of simplified data and process management that ultimately serves as a one-stop-shop for your cross-functional teams, stakeholders and your customers.



About Kissflow Workflow

Kissflow Workflow is the **#1 workflow platform for Google Apps** with over 2 million downloads from the Google Marketplace. The platform offers deep integration with all the apps in Google Apps Suite (Forms, Sheets, Drive, Calendar, etc) and also connects with other applications through friendly APIs

Kissflow is a recommended workflow platform for Google Apps users. Once installed, users would be able to access Kissflow right from their Google Apps Suite. Whether it is attaching documents on the fly, approving workflows via quick actions or synching all of your users, Kissflow empowers you to do it all with ease.



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Workflow

The #1 Google Apps Workflow Platform

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