Workflow Optimization Software Purchasing Considerations

Type and Size of Business

☐ **Small to Midsize Business**
Businesses with 100 employees should consider a workflow management solution that offers cloud or web-based deployment instead of an on-premise installation. You'll have a lower initial investment and the convenience of access from any internet-connected device.

☐ **Large-Scale Enterprise**
With large workforces in different locations, enterprise companies need a scalable and flexible workflow management solution to make information sharing, workflow structuring, and data management more effortless. More complex companies often require advanced features such as business process automation, third-party integration, compliance management, and workflow engines.

☐ **Government**
Government disseminates a vast amount of information every day across different applications, departments, and locations. You need a tool that works for a more extended time and not for a restricted time. The ideal solution translates raw data into usable information and offers notifications that allow people involved to escalate issues to the appropriate parties quickly. The goal is workflow definition and reduced administrative staff workload.
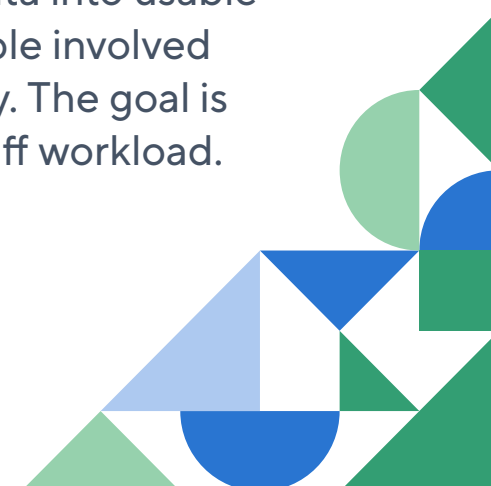
Integration

☐ **Support**
Find a workflow management solution that easily integrates with your current solutions, such as invoicing or customer relationship management software work-life to ensure seamless data transfer and faster adoption.

Data transfer

☐ **Flexibility**
The software you choose should offer the ability to create and configure steps for a wide variety of workflow processes for user-defined rules.

Functionality

☐ **Task Assignment**
Look for features that let you automatically or manually define processes in order to assign tasks to various users simultaneously. Users should be able to reassign duties and change deadlines.

☐ **Automatic Notifications**
Automatic email or text notifications simplify understanding of task status. Alerts about a job are first assigned, pending, completed, or when another user makes an edit saves hundreds of person-hours.

☐ **Reporting**
When you can extract and view exact information on a dashboard, you can easily track activity and see where workflows may need adjustment. With drill-down capabilities, you can access details about numerous functions, including marketing activities, production estimates, and out-of-pocket expenses.

☐ **Form Design**

Enable users to create digital forms by accessing a built-in form designer. This means you can generate forms for a wide variety of needs in every department.

☐ **User-Friendly Interface**

Look for a user-friendly interface that doesn't need extensive training. When you provide users with an easy-to-understand graphical representation of existing and future workflows, you also simplify the comprehension of workflow processes.

☐ **Access Control**

Set roles and responsibilities for users. With role-based guidelines, workers can change processes or adjust separate workflow phases.

☐ **Mobile App**

Provide users with access to workflows on a mobile device or an app for offline workflow. Users can view processes, reports, and other data in areas with minimal internet connectivity.