

Workflow Assessment

During a Workflow Assessment, we evaluate the client's current workflow content, volume, and tools and suggest changes that will facilitate greater productivity and less stress. We make recommendations based on a highly effective methodology perfected over twenty five years of working with thousands of senior professionals. It is conducted at their workstation or office, from two hours to a full work day, depending on the client's availability.

What's the difference between a Workflow Assessment and a Workflow Coaching?

Our Assessment consultation provides an overview of a workflow mastery model and a hands-on experience of how it would work. Our Workflow Coaching program (two days, plus two follow-up telephone meetings) allows a client to actually install, test and fine-tune the model as a sustainable working system.

We recommend when possible that the full Workflow Coaching program be implemented to achieve maximum value from our engagement. However, when time is limited and some progress and further awareness in this area is desired, the Assessment can be a worthwhile investment.

A presentation of the best-practice model of integrated workflow mastery, with a "trial run" of its implementation.

An analysis of the client's unique inventory of work-at-hand.

An evaluation of current tools and practices.

Recommended actions for implementing improvements and enhancements.

If it's on your mind, it's probably not getting done.
— David Allen

For more information

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