

The 3 Ss of Designing Any Workflow:

Steps | Sequence | Systematize

Steps is all about breaking down your process into as simplified of steps as possible, then going through each step and categorizing the work to be done. The categories I like to use are information, determination, creation, ideation, and action. This helps you understand the type of work being done within each step.

Categorizing the work within a given step helps it become easier to understand and help with your planning your time and energy to get the work done. For example some information collecting tasks and some idea generating tasks will be fairly time consuming, but the nature of that work is quite different. Determinations and actions, on the other hand, are actually parts of a step that might take just minutes or seconds, but they're a key part of the step to be done that must be identified.

Sequence is all about taking the steps and categorization and putting it into a more finite detailed list in order of when it's needed. The big caveat here is that most workflows need wiggle room. You might have to revisit steps and refine work based on new information. That's ok. The workflow helps you know exactly where to find and update the relevant information.

Systematize is all about taking that sequence of steps and put it into format that you can reference over and over again. This can be in a project management software like Asana or Clickup. This can be a well designed document file or spreadsheet. This can even be a handwritten checklist that you've made a bunch of copies of to be used every time you need it.

Here's a quick cheatsheet to help you start thinking about designing your workflows. This cheatsheet is all about identifying the steps in your process and then categorizing the work to be done in each step.

- Information: This is a part of a step when you just need to collect information, facts, etc.
- Determination: This is when you need to make a decision about something in your process.
- Creation: This is all about actually creating the thing or things that are part of the outcome of the workflow process.
- Ideation: This is all about taking the time to generate ideas. Without this step, you might not know what to determine, what to create, what information to collect, or what action to take.
- Action: This is a single task that must be completed within a given step.

You'll see after the blank one, I've shown how I've added information for a drawings workflow. This is one of my favorite workflows that I've created as it makes it simpler and easier to have more time to focus on the ideas rather than chasing my tail and spending far too long on creating drawings.

	<i>START</i>	<i>STEP 1:</i>	<i>STEP 2:</i>	<i>STEP 3:</i>	<i>STEP 4:</i>	<i>FINISH</i>
<i>Information</i>						
<i>Determination</i>						
<i>Creation</i>						
<i>Ideation</i>						
<i>Action</i>						

	<i>START</i>	<i>STEP 1: EXISTING DRAWINGS</i>	<i>STEP 2: DEMOLITION DRAWINGS</i>	<i>STEP 3: DESIGN DRAWINGS</i>	<i>STEP 4: PRESENTATION DRAWINGS</i>	<i>FINISH</i>
<i>Information</i>	<i>WHAT IS THE PROJECT AND WHAT DOES IT ENTAIL?</i>	<i>SITE SURVEY</i>		<i>NEW ITEMS BASIC INFORMATION</i>		
<i>Determination</i>	<i>WHAT IS THE SCOPE OF THE DRAWING SET? WHAT IS THE FILE STRUCTURE?</i>		<i>WHAT NEEDS TO BE DEMO'D</i>	<i>WHAT DESIGN IDEA SHOULD GO FORWARD? WHAT SPECIFIC DESIGN IDEAS SHOULD BE SHOWN?</i>	<i>WHAT DRAWING DO I NEED? WHAT PRESENTATION STYLE DO I NEED?</i>	
<i>Creation</i>		<i>DRAW EXISTING</i>	<i>ADJUST EXISTING TO DEMOLITION</i>	<i>DRAW FINAL DESIGN IDEAS</i>	<i>EDIT EXISTING, DEMO, DESIGN AS REQ'D FOR DRAWINGS;</i>	
<i>Ideation</i>				<i>DRAW DESIGN IDEAS</i>		
<i>Action</i>	<i>SET UP FILE STRUCTURE</i>	<i>SAVE EXISTING</i>	<i>SAVE DEMOLITION</i>	<i>SAVE DESIGN DRAWINGS</i>	<i>SAVE PRESENTATION DRAWINGS</i>	<i>SAVE AND ARCHIVE ALL DRAWINGS</i>