

Building Digital Workflows

Save Time

Reduce Stress

Make More Money

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Table Of Contents

01

Me, and the Tool I Use

Who am I? And what is monday.com?

02

Principle I of IV

Don't use what you *currently* do as the model for what you *want* to do.

03

Principle II of IV

Start simple and manual, then add automation when you can.

04

Principle III of IV

Think about reporting and data analysis *before* you think its time to think about it.

05

Principle IV of IV

Constantly revisit what you have already built.

06

monday.com Platform Tips

A handful of nifty tricks I've learned from my experience that will save you time.

07

More Valuable Resources

A coupon to get my monday.com beginner course for **FREE**, forums to bookmark, monday.com plugins, and more...



Hey there! I'm Liam.

I'm a certified business workflow builder by monday.com.



I've curated my experience from building dozens of workflows for companies big and small into this digestible guide.

The Tool I Use:

monday.com is a powerful work operating system that allows teams to build their own workflow in a user-friendly way. It provides a highly visual and flexible platform that can be customized to fit the unique needs of any business. From project management and task tracking to CRM and event planning, monday.com offers a wide range of features designed to help teams collaborate and work more effectively.

Principle I of IV

“DON'T USE WHAT YOU CURRENTLY DO AS THE MODEL FOR WHAT YOU WANT TO DO”

Many of business owners imprison themselves in a "this is how we do it" mindset, when trying to design a digital workflow.

This is **NOT** the path to growth.

Without understanding the platform you are working with, it's hard to picture your workflow in any other way than how you currently do it, but here is an exercise that I believe is very fruitful. Ask yourself:

"In an ideal, perfect world, how would we do x process?"

- Let's say that your process currently consists of: *someone makes an excel sheet, then they send it to this person to review, then that person sends it to the next person for review.*
- If you can step back from that process and say, *"What if we set up an approval system where x person creates an excel sheet, and uploads it so person y and z can see it, and simultaneously review and give their signoff."* Then you're in the right frame of mind.
- Being able to detach from the status quo and innovate in small ways while designing your digital workflow is critical for efficiency.

Principle II of IV

**“START SIMPLE AND MANUAL, THEN ADD
AUTOMATION WHEN YOU CAN”**

What a lot of business owners try to do is start out by trying to implement this grand vision where nobody in the company has to do any manual work. What ends up happening is it takes too much time, and the company doesn't understand the platform well enough to actually even know what they want.

Starting out as simple as you can, and slowly improving and ramping up to a highly automated workflow as the team begins to understand what they want out of the platform is absolutely the way to go. I have firsthand experience of many small business owners saying things along the lines of: *"We like how this has turned out so far and are starting to see what's possible. Can we add in this aspect of our business next?"*

Starting your team off with a very manual process, and slowly cutting out the manual pieces is better for a team than starting off with big promises about how little people will have to do and slowly adding back more manual work.

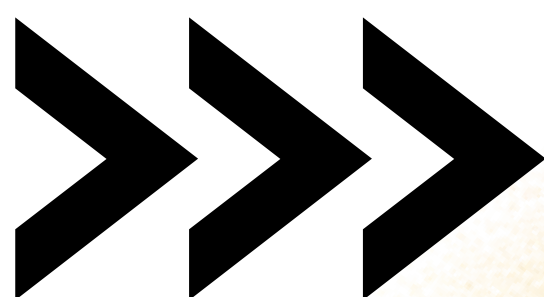
Principle III of IV

“THINK ABOUT REPORTING AND DATA ANALYSIS BEFORE YOU THINK ITS TIME TO THINK ABOUT IT”

When building digital architecture, it's common to focus on reporting LAST. Having in mind the reports that you ultimately want to see, while in the early stages of building your workflow will act as guardrails on what you're building.

It will also save you from having to go back and modify your workflow later on for the sake of collecting data points. Nothing is more annoying to an employee than constant process changes. Here is an example of this line of thinking in action:

“WE WANT TO TRACK HOW MANY LEADS WE ARE QUALIFYING ON A DAILY BASIS”



“WE MUST BUILD INTO OUR WORKFLOW SOME SORT OF ‘QUALIFIED’ BUTTON OR ‘QUALIFIED DATE’ FOR THIS DATA TO BE AVAILABLE.”

Principle IV of IV

“CONSTANTLY REVISIT WHAT YOU HAVE ALREADY BUILT”

When designing a digital workflow, it's easy to say "we finished with x aspect of our build, lets move on to y" and so on. When you "finish" with y, you need to go back to x with any new knowledge you've gained from building y, and modify x. Then repeat when you finish z, ask: "Are x and y in line with z?".

As you, the designer, learn more throughout the course of a build, you will realize your previous work is outdated when you approach it with your newfound knowledge.

A workflow is never “*finished*.”

monday.com Platform Tips

*Tips & tricks from an expert to save you
and your team time*

- **Less Workspaces**

- Don't use extra workspaces when it's not necessary. Monday prescribes to use workspaces per department, or team. If your team doesn't mind working all together in one workspace, being centralized will dramatically reduce the amount of clicks needed to navigate the space.

- **Stay away from subitems**

- Subitems can be useful for organizing tasks, but they are not supported in automations, apps, dependencies, and dashboards as robustly as main items are. It's best to use subitems as simply as possible if at all.

- **Mirror & Formula Columns**

- Both mirror columns and formula columns can be extremely powerful within your monday.com boards. These two are special in that the calculations and reflections happen on the client side. This means that both of these column types are excluded from almost all automation recipes.

- **Monday.com Product Suite**

- [Monday.com](https://monday.com) recently pivoted their offering to be a suite of products rather than just one (Work Management). In my opinion, the different products are repackaged versions of Work Management, and offer very few unique features. At the time of writing this, (July 2024) the only reason I would consider adding another product to your account is specifically if logging email correspondence with leads/customers is very important to you. In that case, I would suggest adding the Sales CRM product to your account. Besides that, I don't think the functionality gained from any other area of a product outweighs the additional cost.

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