



Building workflows in monday.com

Popular board structures

Additional resource

Process workflows – Horizontal

Process workflows – A set of repeatable and predictable steps which multiple entities go through to reach a specific outcome

Horizontal boards

- Each step is represented by a column
- Most popular structure for process workflows

Pros	Cons
Ideal for repeatable work with minimal data points	Not ideal if there are a lot of steps
Scalable for a large amount of entities	The board may get crowded with a lot of columns
Can assign a different owner/date for each stage	Harder to report on the stage the entity is at
Manage all entities on one board	
Add a progress column to visually show the overall entity progress	

Process workflows – Vertical

Process workflows – A set of repeatable and predictable steps which multiple entities go through to reach a specific outcome

Vertical boards

- Steps are represented as groups
- The entity pass through the steps by moving from group to group

Pros	Cons
Ideal for processes with a large number of steps	Cannot have separate data point per stage
Can automate the workflow (when stage column changes to X move item to group X).	Cannot have separate owners/dates per stage (it is all using the same column)
Board is less crowded with columns	More challenging to create notifications to stage owners when the previous stage is done
Easier reporting on the stage each entity is at	

Project workflows – Single board per project

Project workflows – A set of tasks which must be completed in order to arrive at a particular goal or outcome.

Single board per project:

- One project will be managed on one board.
- The groups can represent the phases of the project/department.

Pros	Cons
Ideal for medium sized projects	Not ideal for large and complex projects
Allows cross team collaboration	Limitation of 50 boards per dashboard can affect cross projects reporting
Allows for each project to have its own unique data points/views and automations	
Allows for segmentation between projects and project teams (each project team will have access to the relevant project board).	
Allows easy reporting on a project level	
Easy dependencies setup	

Project workflows – Multiple boards per project

Project workflows – A set of tasks which must be completed in order to arrive at a particular goal or outcome.

Multiple boards per project:

- One project will be managed in multiple boards where each board will represent a phase/department.

Pros	Cons
Ideal for very big and complex projects	Limitation of 50 boards per dashboard can effect cross projects reporting
Can have different data points for each stage/department	No cross board dependencies

Project workflows – Single board for all projects

Project workflows – A set of tasks which must be completed in order to arrive at a particular goal or outcome.

Single board for all projects

- All projects are managed on one board where each group represents a different project

Pros	Cons
Ideal for small and simple projects	No information is captured at the project level, only on the task level
Ideal where the projects being managed are all similar in size	Harder to see what stage each project is at
Everything is managed in one place	Same data points for all projects
Easy reporting across multiple projects	