HOW TO CREATE A WORKFLOW: COMPLETED EXAMPLE

An example with a fictitious company: a print shop answering quote requests. The minutes are example estimates, not measurements.

THE PROCESS

Company	Tipografia Moretti (fictitious name)
Process name	From quote request to confirmed order
Who owns it	Giulia Moretti, owner
Where it starts	A request by email or from the website form
Where it ends	The confirmed order, with the deposit, passed to production
Times per week	25

THE STEPS

No.	Step	Who does it	Minutes	Rule or condition	Does a person approve?	Can a system prepare it?
1	Log the request	Front office	4	If size or quantity is missing, ask straight away	no	yes
2	Ask for missing details	Front office	3	One email with all the questions	no	yes
3	Work out the quote	Owner	15	Discount only above 1,000 copies	yes	partly
4	Send the quote	Front office	5	Valid for 30 days	yes	yes
5	Reminder after 7 days	Front office	3	Only if there is no reply	yes	yes
6	Confirmation and deposit	Accounts	6	Order only with a 30% deposit	yes	partly
7	Pass to production	Owner	5	Delivery date confirmed	yes	no

THE TOTALS

Minutes per run	41
Minutes per week	1,025
Hours per week	17.1

Five of the seven steps can be prepared by a system, fully or partly; pricing and passing the job to production stay with the owner.

Sheet built by Itria. How to fill it in, step by step, and what AI can do inside a workflow:
itria.io/en/come-creare-un-workflow

Template built by Itria, to adapt to your own process.

If you run a process like this by hand every day, an AI system can prepare the steps marked “yes” and leave them for a person to approve. A couple of lines on WhatsApp to +39 350 574 3578 or an email to info@itria.io. How it works: itria.io/en/servizi