TOTAL CSR

The New Workflow Launch Kit

Turn changed agency procedures into usable training

Use this kit when your agency changes how work gets assigned, completed, checked, or handed off. It helps managers define the new behavior, demonstrate it, give employees practice, and check whether it holds up in real work.

Start with one workflow and one accountable owner.

Employees need a usable procedure, working access, time to practice, and a clear route for exceptions before they can reliably use the change.

Suggested timing

1. Prepare and pilot before launch.
2. Send the announcement after the procedure and dates are approved.
3. Run the demonstration and practice before independent use.
4. Review the first eligible work within two business days, again after two weeks, and again after 30 days.

Adjust this timing to the workflow's frequency and consequences.

How to use the templates

- Replace bracketed text before sharing.
- Duplicate the assignment and observation pages for each employee.
- Pages 9 and 10 belong to the workflow owner.
- The renewal example is fictional and shows an internal handoff, not a universal agency procedure.

Your launch sequence

STAGE	USE THESE PAGES	LEAVE WITH
1 Define	PAGE 3 Workflow change brief	A specific behavior, owner, cutover rule, and definition of done.
2 Prepare	PAGE 4 Rollout checklist	A tested procedure, working access, and a launch decision.
3 Explain	PAGE 5 Employee announcement	A clear message covering what changes and what stops.
4 Demonstrate	PAGE 6 Demonstration agenda	A visible example of the normal path and an exception.
5 Practice	PAGES 7 TO 8 Assignment and observation	Evidence that employees can perform the work.
6 Review	PAGES 9 TO 10 Adoption review and decisions	A targeted fix and a scheduled follow-up.
7 Apply	PAGE 11 Commercial lines example	A completed example you can adapt to your agency.

1 Define the workflow change

Complete this brief before writing the announcement. If the team cannot describe the changed behavior, the procedure is not ready to teach.

WORKFLOW NAME AND PURPOSE

OWNER | **APPROVER** | **VERSION AND DATE**

EMPLOYEES AFFECTED AND WHEN THIS WORKFLOW APPLIES

CURRENT PROBLEM AND THE EVIDENCE BEHIND IT

Before	After	Stop doing
[Current action or handoff]	*[Observable new action]*	*[Old step channel or duplicate record]*

DEFINITION OF DONE AND EVIDENCE SAVED IN THE AGENCY SYSTEM

REQUIRED INPUTS ACCESS AND THE PERSON RECEIVING THE HANDOFF

EXCEPTION ROUTE INCLUDING URGENT WORK AND WHO CAN DECIDE

SET THE TRANSITION RULE

LAUNCH DATE AND TIME | **NEW WORK USES** | **OPEN WORK USES**

WHO IDENTIFIES TRANSFERS AND PREVENTS WORK FROM BEING MISSED OR DUPLICATED

CURRENT PROCEDURE LOCATION | **BACKUP OWNER** | **PRACTICE TIME RESERVED** | **WORK THAT PAUSES OR GETS REASSIGNED**

2 Complete the rollout checklist

Record an owner and due date for each item. Check an item only when its evidence exists. Mark an item N/A only with a reason. Copy this page if you need more space.

Ready	Required evidence	Owner and due date
☐	Procedure states trigger, inputs, steps, handoff, completion evidence, and exceptions.	
☐	A typical employee and a downstream recipient test one normal case and one exception.	
☐	Affected employees have verified permissions, templates, and system access.	
☐	Cutover covers new work, open work, absences, and cross-team handoffs.	
☐	Old instructions and duplicate templates have a removal or archive plan.	
☐	Announcement, demonstration, job aid, and practice all teach the same version.	
☐	Protected practice time, feedback time, and missed-session makeup are scheduled.	
☐	Owner names critical errors and the evidence required before independent use.	
☐	Support channel, backup, escalation response time, and urgent route are confirmed.	
☐	Baseline, eligible work definition, sample method, and review dates are recorded.	
☐	Fallback procedure and who may authorize it are defined and communicated.	

MAKE THE LAUNCH DECISION

Decision: ○ Launch ○ Pilot with named supervision ○ Delay and fix

OPEN ISSUE ITS CONSEQUENCE AND THE OWNER AND DATE FOR RESOLUTION

APPROVER

DECISION DATE

FIRST REVIEW DATE

> Do not launch independent work when a critical access, ownership, or handling gap remains. A supervised pilot must identify the limited scope, supervisor, and safe fallback. Continue needed client service through the approved route while resolving the gap.

3 Send the employee announcement

Copy and adapt this message after the workflow owner approves the brief. Replace every bracketed field and verify each link before sending.

SUBJECT

Starting [date]: new process for [workflow name]

MESSAGE

Team,

Starting **[date and time]**, **[affected roles]** will use **[new process]** for **[eligible work]**. We are making this change because **[specific problem and its effect on employees or clients]**. Our goal is **[observable result]**.

Here is what you will do differently:

- When **[trigger occurs]**, **[role]** will **[first new action]**.
- Before **[handoff or completion]**, **[role]** will **[check or decision]**.
- Save **[required evidence]** in **[system location]** and send the work to **[receiving role or queue]**.

Stop using **[old step, template, or channel]** for **[scope]** after **[cutover]**. For work already in progress, **[specific transition rule and owner]**. **[Named person]** will confirm that open work has an owner and the correct next step.

The current procedure and job aid are here: **[link, version, date]**. We will demonstrate the process on **[date, time, location]**. You will practice **[task and exception]** by **[deadline]** and receive feedback from **[reviewer]**. We have reserved **[time]**; **[existing work]** will pause or be reassigned during practice.

Before working independently, you will need to demonstrate **[required actions and critical checks]**. If you miss the session, complete **[makeup demonstration and practice]** with **[person]** before independent use.

For questions or blockers, use **[channel]**. **[Owner or backup]** will respond within **[agreed time during stated hours]**. For urgent work or a deadline that cannot wait, contact **[urgent escalation route]**. Do not guess or allow a deadline to pass while waiting for routine support.

We will review real examples on **[first review date]** and again on **[later review dates]**. Tell us where the steps, ownership, or systems make the work difficult. We will use that feedback and work samples to adjust the procedure and support.

Thank you,
[Manager name]

4 Run the demonstration

Allow 20 minutes for the demonstration, followed by separate hands-on practice. Show the exact tools employees will use. Use a test environment or approved fictional records; do not change live client work just to demonstrate a step.

FACILITATOR	DATE	PROCEDURE VERSION

PREPARE BEFORE THE MEETING

- [ ] Open the job aid and verify access. Load one normal case, one exception, and a completed example.
- [ ] Confirm what the receiving person needs and which mistake would make the result unacceptable.
- [ ] Have a backup demonstration ready if the system is unavailable. Still require live practice later.

Minutes	Facilitator action	Ask employees
0 to 2	Explain the problem, trigger, new behavior, and old step that stops.	*When does this process apply?*
2 to 8	Complete the normal case. Narrate the inputs, decisions, and required evidence as you act.	*What must be true before I hand this off?*
8 to 11	Show what the recipient sees and how the handoff is accepted or returned.	*Who owns the work at this point?*
11 to 15	Show missing information or an urgent exception. Use the escalation route.	*What would make you stop and ask?*
15 to 18	Have an employee explain the sequence and identify an error in a sample.	*What is wrong and how would you correct it?*
18 to 20	Assign practice, explain the review criteria, and identify the support owner.	*Where will you find help and the current instructions?*

CAPTURE UNRESOLVED QUESTIONS

QUESTION AND WHETHER IT CHANGES THE PROCEDURE

ANSWER OWNER	DUE	UPDATE LOCATION

> If a question exposes a material gap, resolve it and update the procedure before asking employees to use that step independently. Tell the team what changed; do not leave conflicting versions in circulation.

5 Assign hands on practice

Give each employee a copy. Use the current job aid during practice, just as they will during work. Do not use live client data in an unapproved training tool.

EMPLOYEE	REVIEWER	DUE

WORKFLOW	PROCEDURE VERSION	PRACTICE TIME

Complete a normal case

STARTING SCENARIO AND SUPPLIED INPUTS

Your task: perform the workflow from its trigger through the handoff. Save the required output, show who owns the next step, and explain how you know your part is complete.

OUTPUT TO SUBMIT AND WHERE TO SAVE IT

Complete an exception case

CHANGED FACT MISSING INFORMATION OR CONFLICTING INSTRUCTION

Your task: identify what is uncertain, choose the approved route, record the issue, and identify the decision owner and follow-up time. Explain what you can safely complete while waiting.

EXPLAIN THE DECISION

Be ready to answer: What triggered the workflow? What had to be checked? Who owns the next action? What would make you escalate? Which old step should no longer happen?

WHERE DID THE PROCESS OR JOB AID LEAVE YOU UNSURE

Critical errors to avoid for this workflow: [manager completes before assignment].

Submit **[output or record reference]** to **[reviewer]**. The reviewer will observe the key actions and use page 8. Correct any missed step and repeat the affected case before independent use. Attendance alone does not complete this assignment.

6 Observe and give feedback

Use one copy per employee. Evaluate the work against the published procedure. Mark each item Met, Retry, or N/A with a reason. Mark workflow-specific critical checks before practice begins.

EMPLOYEE | REVIEWER | DATE

CASE REFERENCES | PROCEDURE VERSION

Observe	Critical	Result and evidence
Recognizes the trigger and selects the correct workflow.	☐	○ Met ○ Retry ○ N/A
Checks required inputs and identifies missing information.	☐	○ Met ○ Retry ○ N/A
Performs steps and records accurate required evidence.	☐	○ Met ○ Retry ○ N/A
Assigns the next owner and completes the handoff correctly.	☐	○ Met ○ Retry ○ N/A
Handles the exception without guessing or bypassing approval.	☐	○ Met ○ Retry ○ N/A
Explains completion and locates the current job aid.	☐	○ Met ○ Retry ○ N/A
Stops the retired step for work within the new scope.	☐	○ Met ○ Retry ○ N/A

DECIDE READINESS

○ Ready for independent use ○ Supervised use only ○ Repeat practice before use

Ready means all applicable criteria are Met on both cases where relevant, with no unresolved critical error. A critical error is a mistake the owner has identified as creating material client, deadline, record, or authority risk. The agency may require additional checks for higher-risk work.

SPECIFIC ACTION DONE WELL AND THE EVIDENCE

MISSED ACTION AND WHETHER THE CAUSE WAS SKILL INSTRUCTIONS ACCESS OR WORKLOAD

CORRECTION OR SUPPORT | OWNER | DUE

RETRY CASE | RETRY DATE | REVIEWER | RESULT

Record final readiness after the retry. If use remains supervised, name the supervisor and what they must check:

7 Review adoption in real work

Complete at the first review, after two weeks, and after 30 days. Choose a sample across affected roles and both normal and exception cases. Training completion and live use are separate measures.

WORKFLOW

OWNER

REVIEW DATE

PERIOD

VERSION

ELIGIBLE WORK DEFINITION

TOTAL ELIGIBLE ITEMS

ITEMS REVIEWED

SELECTION METHOD

BASELINE PERIOD AND SOURCE

UNUSUAL CONDITIONS

Measure	Baseline	Current result
Employees ready for independent use ÷ employees expected to use the workflow	/	/
Reviewed eligible items following all required steps ÷ reviewed eligible items	/	/
Reviewed eligible items with the retired step still used ÷ reviewed eligible items	/	/
Reviewed eligible items requiring correction ÷ reviewed eligible items	/	/
Reviewed eligible items missing an agreed deadline ÷ reviewed eligible items	/	/
Reviewed exception items routed correctly ÷ reviewed exception items	/	/

Multiply each fraction by 100 for a percentage. Use N/A for zero eligible observations or an unavailable baseline. Keep item definitions consistent. Retired-step and correction counts can overlap; do not add these rates together. Record critical errors separately and address them immediately.

RECORD REFERENCES AND EVIDENCE OF SUCCESS OR A REPEATED FAILURE

EMPLOYEE FEEDBACK ON CONFUSING STEPS WORKAROUNDS AND ADDED EFFORT

CLIENT SERVICE IMPACT CRITICAL ERRORS AND IMMEDIATE ACTION TAKEN

> Interpretation: compare similar work and note volume, complexity, absences, and system problems. A small or unrepresentative sample supports a limited conclusion. If no eligible work occurred, schedule an observed case and review later live use.

8 Choose the next action

Use the work samples and employee feedback to identify the cause. Ask the employee to show the step with the correct instructions, inputs, access, and enough time before deciding more training is needed.

What the evidence shows	Response to test
Cannot explain or perform a required step even with usable instructions and access.	→ Demonstrate that step again, assign a fresh practice case, and observe a retry.
Different employees interpret the same instruction differently.	→ Clarify the procedure and example; update the job aid and tell everyone what changed.
Employee can perform the work, but permissions or tools block it.	→ Fix access or the tool. Provide the approved temporary route and a resolution owner.
New step is skipped when volume peaks or old work still competes.	→ Rebalance work, protect time, or remove duplicate steps. Check whether the workload is feasible.
Work stalls between roles or is sent to the wrong person.	→ Name the sender, recipient, acceptance evidence, and escalation owner. Test the handoff together.
Employees repeatedly use an old template or shortcut.	→ Find the reason. Retire stale materials, fix friction, and address expectations if the process is usable.
Critical errors or service delays appear after launch.	→ Contain the affected work now. Owner decides on supervised use, a limited pause, or the approved fallback.

COMMIT TO THE NEXT CHANGE

EVIDENCE AND THE SPECIFIC FIX TO TEST

OWNER

DUE

CURRENT RESULT

TARGET

SERVICE MEASURE TO PROTECT

NEXT REVIEW DATE

Decision: ○ Continue ○ Adjust and review ○ Supervise ○ Pause or use approved fallback

WHO IS AFFECTED WHAT THEY WILL BE TOLD AND WHICH INSTRUCTIONS WILL CHANGE

DECISION APPROVER

EMPLOYEE FEEDBACK OWNER

> Close the launch when the owner's predefined adoption and service criteria hold across the agreed review period. Keep the current procedure, exception route, and periodic checks in place after launch closes.

9 Commercial lines launch example

Fictional example: standardize the internal renewal handoff from the account manager to the marketing team. These are illustrative agency rules, not coverage requirements or industry benchmarks.

DEFINE THE CHANGE

Marketing receives fragmented renewal information by email. The new process uses one handoff record in the agency management system. The account manager links source documents, lists outstanding information, names the next owner, and assigns a status.

Statuses: Ready means the agency's input checklist is satisfied. Pending information means missing items have an owner and follow-up date. Urgent exception means the approved deadline rule requires a supervisor decision. The team does not mark missing information as complete or let a renewal deadline pass while waiting.

Done: marketing records acceptance and the next action in the same record. Until acceptance, the account manager remains responsible for tracking the handoff. Stop using email as the sole handoff record; messages may link to the system record.

LAUNCH AND DEMONSTRATE

The service manager approves the procedure; the administrator verifies access. An account manager and marketer test it together. At launch, new handoffs use this process. The manager assigns owners to reconcile open handoffs that day, preserving deadlines and preventing duplicates.

Use the page 6 agenda to demonstrate the two cases below. Show acceptance for the normal case and document the decision owner, next action, and follow-up time for the exception.

PRACTICE AND ASSESS

Normal case: a fictional contractor's renewal information is complete. Create the record, link inputs, set Ready, assign marketing, and show acceptance. Exception: payroll information is missing and the deadline meets the escalation rule. Record the gap and route it to the supervisor without implying the file is complete.

Critical checks: do not mark missing inputs complete, leave a handoff without an owner, or bypass the urgent route. The reviewer assesses both cases using page 8 and observes a retry for any missed criterion.

REVIEW AND RESPOND

Illustrative two-week result: all 6 affected employees passed practice. Of 20 reviewed handoffs, 16 followed all steps; 4 lacked acceptance evidence. Of 3 exception cases, all 3 were routed correctly. Two handoffs missed the agreed internal deadline. Employees report that acceptance is hard to find on the screen.

Decision: make the acceptance field easier to locate, update the job aid, and demonstrate that step again. Review the next 10 handoffs and investigate both missed deadlines. The initial target is 10 of 10 with acceptance evidence and no missed handoff deadline; this is a local test target, not a benchmark. Do not infer sustained adoption from practice completion alone.

Use the gaps you identify to focus the next training assignment. Learn more about Total CSR at totalcsr.com.

TOTAL CSR