

## Is workflow the wrong metaphor?

While workflow is a key component of content management systems (CMS), the unspoken truth is that workflow often fails (or is only moderately successful) in most organisations.

This briefing explores the reality of workflow in organisations, identifies a number of problems and issues, and asks the question: is workflow the wrong metaphor?

### The ideal

In many organisations, a driving factor behind obtaining a content management system is to enforce greater control over the publishing process.

Problems with ad-hoc existing processes have caused incorrect or out-of-date information to be published, leading to wrong decisions, embarrassment or even legal issues.

The vision is therefore to introduce a CMS that will enforce a formalised review and approval process (workflow). These workflows then ensure that only accurate and meaningful information is published to the site.

### The reality

Organisations are complex. In practice, the 'rules' that determine who should review and approve a piece of content depend on many factors, including: type of content, subject, author, area of the business, potential legal exposure, publishing time frame, and more.

While the goal may be to implement a few 'standard' workflow rules, these generally fail to address the complexity that exists within organisations.

These practical issues generate a considerable gap between the vision communicated in CMS tenders, and the reality of implementation. While a range of complex and powerful workflow features may have been requested, organisations typically end up configuring simple 1–3 step linear workflows.

In some cases, workflow is simply bypassed by the majority of authors, in the interests of easy or timely publishing. In this situation, the workflow isn't really put into practice at all.

In many cases, the creation or editing of content is split into two phases. There is the initial 'collaborative' phase of content editing, which is left to be managed ad-hoc via e-mail or printed copies. Only when the content has been finalised (in Word format, etc) is it submitted to the linear workflow for final approval.

### When workflow works best

Workflow is most effective when there are clearly-defined, well-understood business processes already in place. The workflow rules can then be setup to match these existing processes. An example would be the publishing of a standard report every month, which would benefit from further automation and management.

### Task management?

Instead of trying to fit the concept of formalised linear workflow to every situation, some organisations have started to explore whether a different metaphor would be more relevant: that of *task management*.

The principle behind task management is that there aren't any formal rules. Instead, a user can assign a task related to a specific piece of content to another staff member. For example, a request could be sent to:

- review the content
- update the content
- add additional details

These tasks are tracked within the CMS, to ensure that they are completed within required time frames.

Depending on the situation, updated pages may then be published directly, or may have to go through a final linear workflow before publication (such as a quality review by the web team).

This task management metaphor is a closer fit to the way that many staff work, and may prove to be a valuable alternative to the traditional workflow models.

This is still a fairly new idea in the industry, although a few vendors have already started delivering task management features within their CMS products.