



WORKGRID

Workflows

Streamline complex processes

From straight-forward opening and closing procedures to more complex onboarding processes, Workflows automates the delivery of tailored task lists, eliminating fragmented and decentralized experiences.

Customize task lists for individual roles within a process and ensure employees receive only tasks relevant to them – ideal for processes like onboarding where an employee’s to-dos look different than their manager’s or someone in HR or IT.

Streamline enterprise and departmental processes:

- ✓ Onboarding
- ✓ Offboarding and retirement
- ✓ Return-to-office
- ✓ Daily opening/closing procedures
- ✓ Daily in-office health verifications
- ✓ Objectives and goal setting
- ✓ Performance reviews
- ✓ Training and compliance education
- ✓ Security and compliance check points

Send Task List at the set date and time

HR Onboarding Tasks
From Human Resource

Send Task List at the set date and time

IT Onboarding Tasks
From IT Department

To users in the Value jane.n

Setup VPN

Register your mobile device for MDM

IT Onboarding Tasks


from IT Department

✓ JAN 22

- ✓ ~~Setup VPN~~
Due Jan 29th
- Register your mobile device
Due Jan 29th



Workgrid

 **Task Notifications**
1d ago New

You have a new Assigned List

You have been assigned the list "Welcome aboard!"

FYI

▼ JAN 22

- Watch Welcome Video
Due Jan 22nd
- Handbook
Due Jan 22nd

▼ TODAY JAN 19

- Complete W-4
Due Today

▼ FEB 14

- Enroll in benefits
Due Feb 14th

▼ APR 15

- 401k enrollment
Due Apr 15th

▼ APR 25

- Training Video
Due Apr 25th

Maximize efficiency

Unlike other solutions, Workgrid Workflows give managers real-time visibility into the status of each task. And commenting functionality empowers managers to provide input and support employees at any point in the process.

Tasks can be delivered sequentially at pre-determined times using date or date-based attributes, such as start date, certification expiration date, etc.

Target tasks and lists with attributes:

- ✓ **Persona**
- ✓ **Business unit**
- ✓ **Location**
- ✓ **Job level**
- ✓ **And more!**

workgrid.com/workflows