Key processes for Food Production **to automate now!**

Flowingly

Level up your food production automation

Workflow automation in the food production space is already fairly common.

In fact, food production was one of the first industries to introduce digital process transformation.

However, many organizations are still utilizing outdated legacy automation software and relying on paper-based processes for office-based work.

While old doesn't necessarily mean bad, in the case of workflow software it can mean the difference between rapidly automating and iterating hundreds of processes a year and spending thousands of dollars maintaining five.

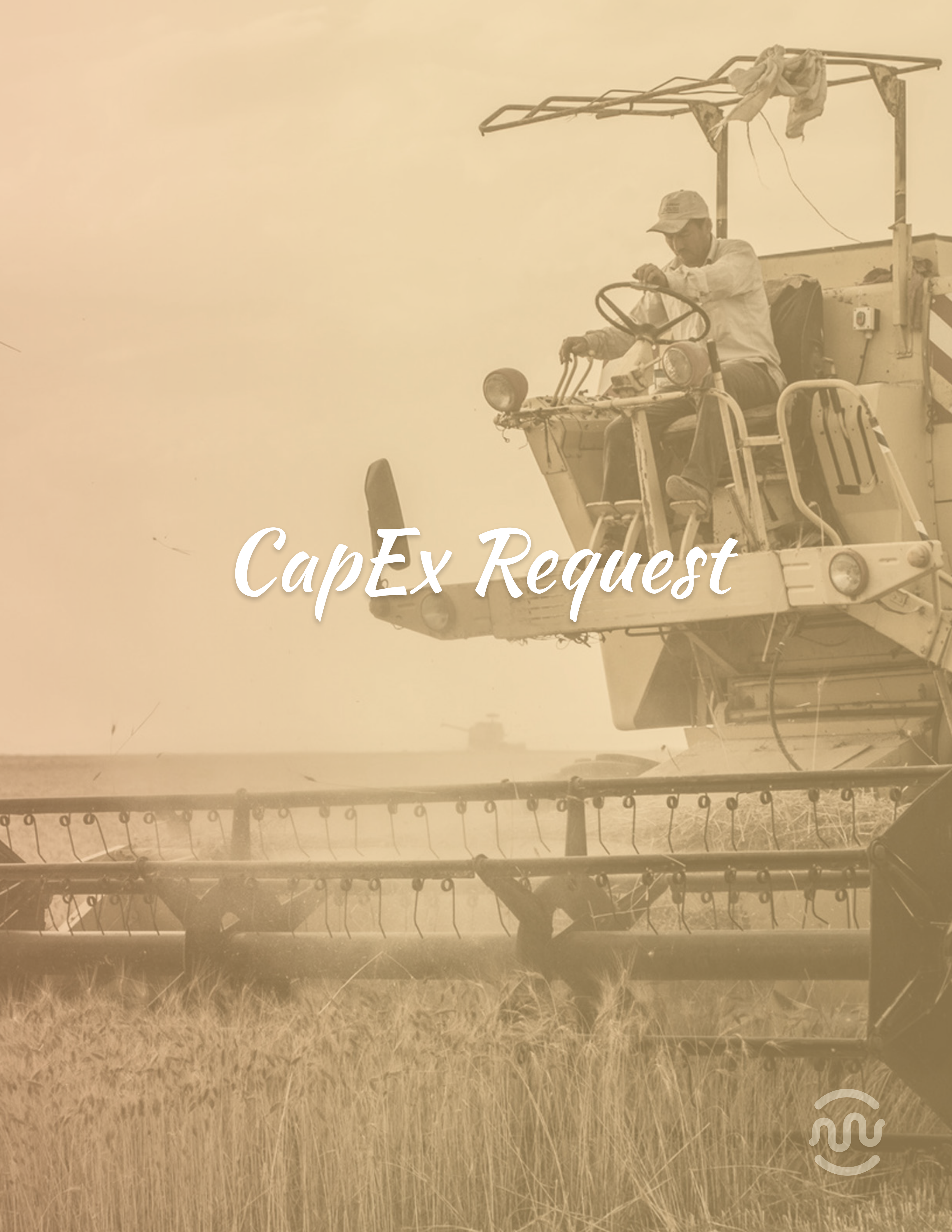
If your organization is currently outsourcing automation to highly-specialized developers and you're seeing your workflows continue to break – you might need to rethink your automation efforts.

No-code workflow and process automation allows your frontline food production workers and leaders to take control of their own processes. Each of the processes within this guide take 30-60 minutes to build. By deploying these, you will not only improve the customer experience, but also free up time for your teams to spend on value-adding work.

Contents

3 CapEx Request
9 Non-Conformance Management
12 Incident Reporting
16 New Product Development
20 Manage Product Changes

CapEx Request



CapEx

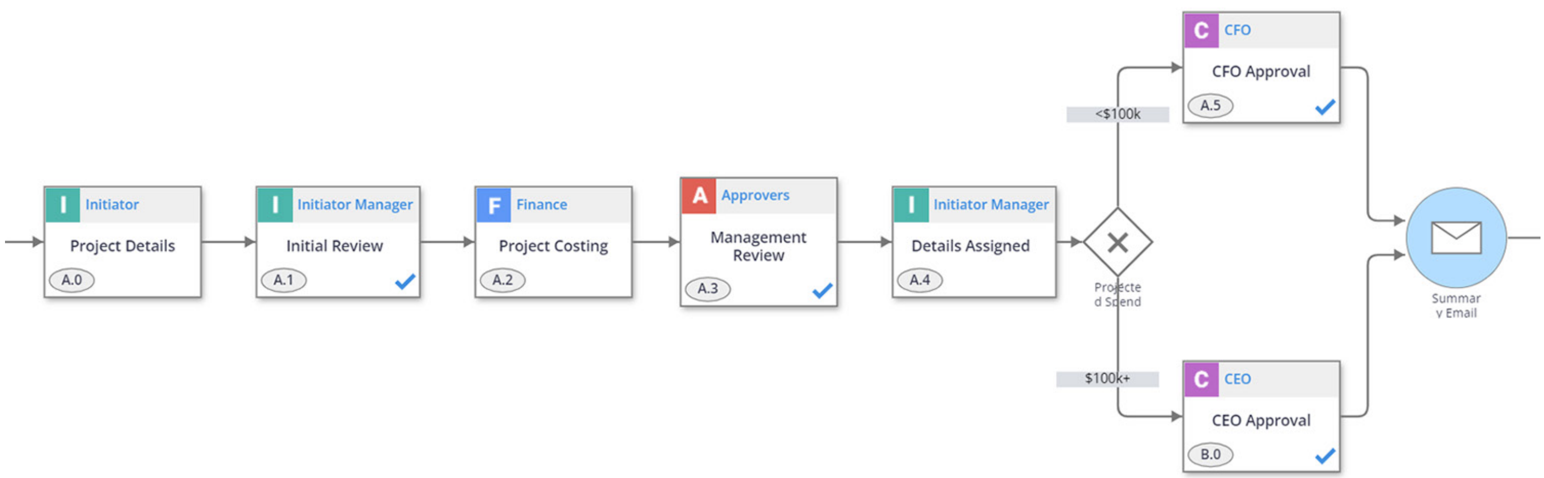
You ask your manager how to request spending on a project. She sends you a 6-tab Excel sheet with screeds of red text. You fill it out. Half the formulas return errors. Who cares. You save the doc and send it to the procurement email. Then you drum your fingers, wondering how long to wait before following-up.

Ring a bell?

If there is one process that frustrates everyone involved, it's CapEx.

For the applicant, it is admin heavy and packed with irrelevant questions. For the finance team, it's infuriating when half the spend just bypasses the process and gets approved.

The workflow below changes that.



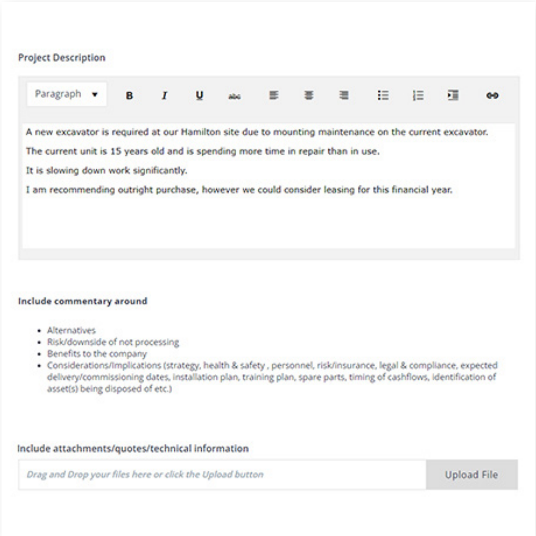
Best practices when building this kind of workflow:

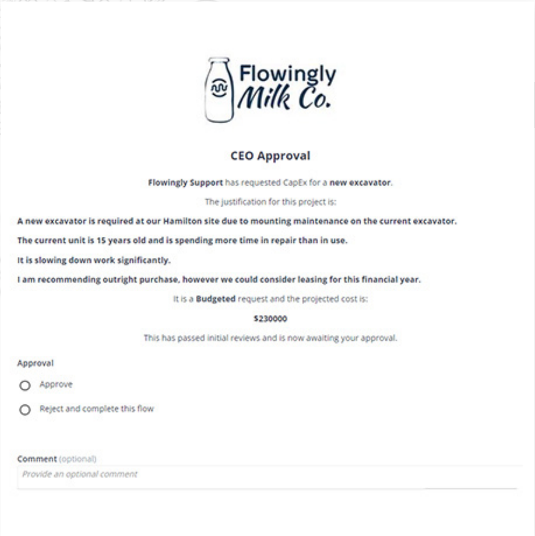
1 Include instructions

Walk the requestor through the process by including clear instructions at every stage.

While this may take you 15 minutes to write out when you build the workflow, it will save you all sorts of error-fixing and back-&-forth further down the track.

Take it a step further by linking out to your CapEx policy, supplier list and example documents.





2 Serve the right info at the right time.

At certain steps of the CapEx process, we only need to see specific details in order to progress the request.

If it's escalated to the CEO, she doesn't want to see every single detail. It's already gone through multiple approvals before getting to her. She just wants a quick summary of business impact, cost and a dotted line to sign.

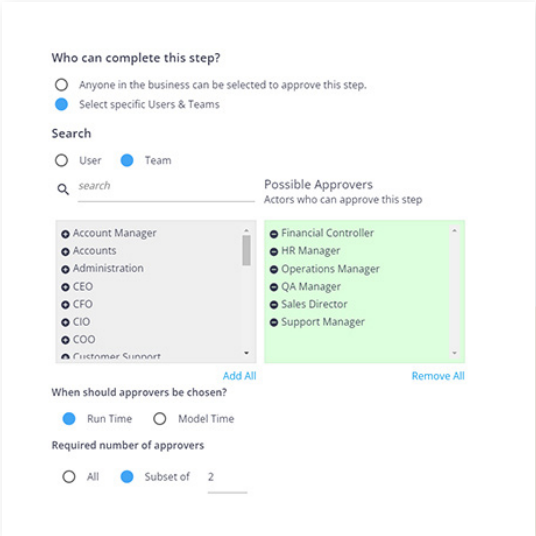
By only serving up the exact info needed, you can save valuable time across your workforce.

3 Set up parallel approvals

Single-person approvals create bottlenecks. They get held up when people are busy and tend to create dependence on certain people.

By using parallel approvals, you can assign approvals to a group of people.

This means that if any one of them signs it off the whole thing progresses. Or maybe you need three of them to sign it off before it progresses. With Flowingly, you decide.



Why you should be automating this process

Automating your CapEx request means less misspent budget and a happier finance team. CapEx processes are often overly-complex and unclear. By creating a clear, simple process you will give your staff an insight into why they need to follow the process and what is expected of both themselves and others.

GIVE THE REQUESTOR VISIBILITY

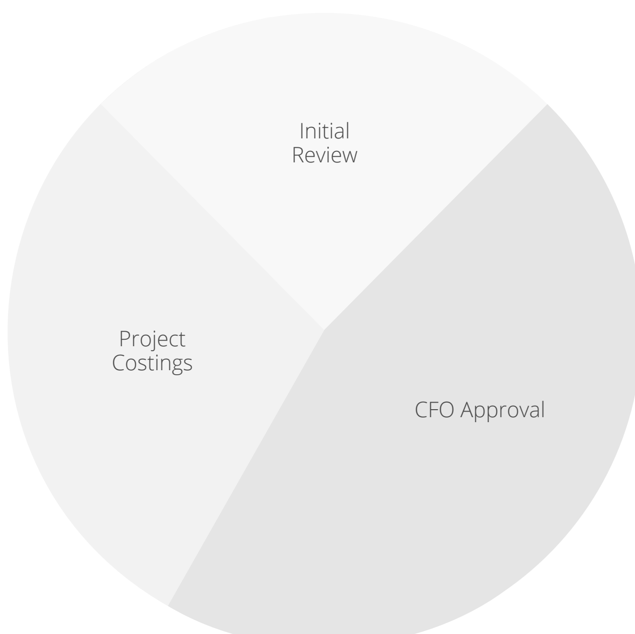
Traditionally, CapEx processes are about as clear as mud to the requestor. By giving the requestor a clear view from start to end, they can see who it's waiting on for approval, how long it will take and even give a nudge if things are running behind.

UPDATE YOUR FINANCIAL SYSTEMS

Automatically send data captured in your CapEx workflow to your ERP or Invoicing systems. Reduce the double handling that plagues finance teams and make your tools do the work.

MAKE THE RIGHT DECISION

With an easy-to-access form and clear workflow, staff will be more likely to follow the correct process. This in turn creates consistent outcomes and will ensure your finance team isn't blindsided by hidden spending any more.



Build reports to show which stages are commonly overdue.

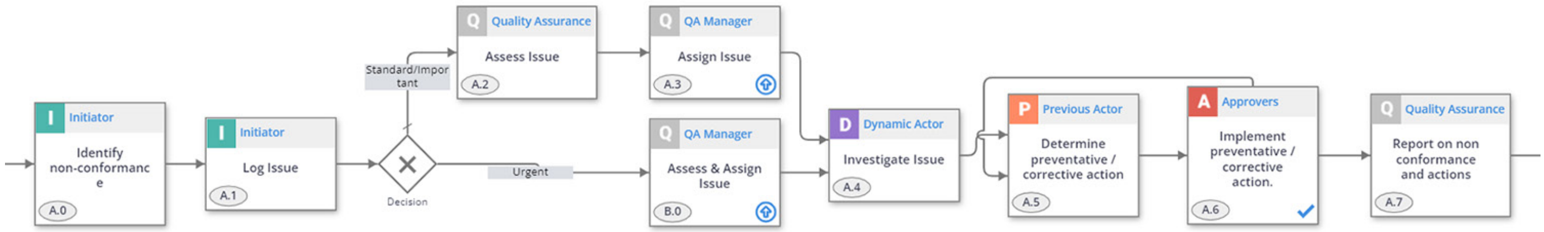
Non-Conformance Management

Non-Conformance Management

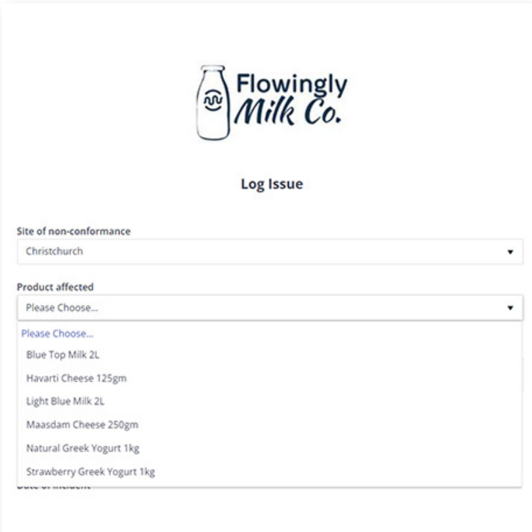
A non-conformance means that something went wrong. It occurs when something (product, output, process, project) does not meet the specification or requirements in some way.

Non-conformity can be extremely costly, both to the producer and to the consumer. The purpose of a non-conformance workflow is to document non-conformances, put corrective actions in place to fix the issue and identify the root cause in order to stop it happening again.

The workflow here is specific to non-conformance of a product.



Best practices when building this kind of workflow:



1 Make it easy to report

Non-conformance can be reported from a variety of situations and sources (customer concern, external audit etc.), so it is important that you can capture a variety of details in a simple manner.

Reduce wordiness by giving people the ability to upload photos and videos directly from their mobile.

Save admin and confusion further down the track by giving the reporter the ability to add their recommendations on simple fixes.

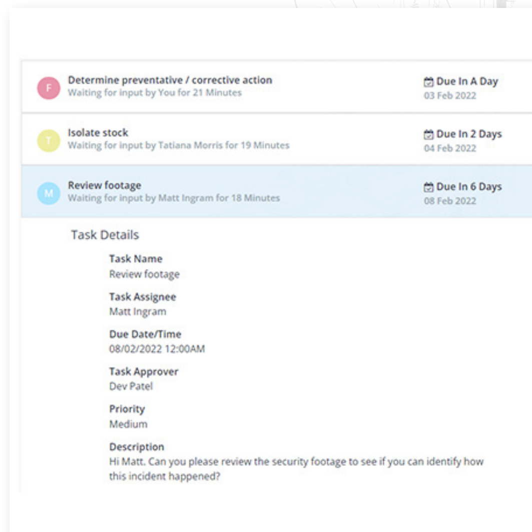
Take it a step further by auto-populating fields such as the reporter's details and reference databases to auto-assign steps based on area of responsibility.

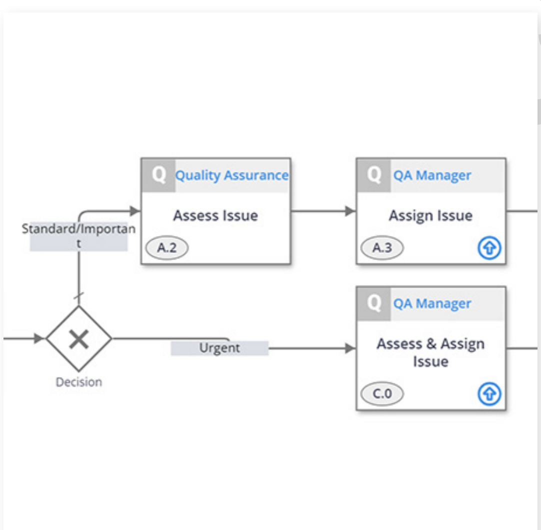
2 Dynamic corrective actions

There are many variables in a non-conformance process. Potentially a customer was hurt and the company needs to take remedial action. Maybe an external auditor identified the issue and wants to be alerted of the findings.

Whatever the case, your workflow needs to be flexible enough to account for a variety of situations. If you're using Flowingly, this is where you would use Step Tasks. Step Tasks give you the ability to set tasks for an employee on the fly.

In the case of a customer being hurt, you would want to set tasks to keep communication flowing with the customer, loop in your legal team and even alert your PR firm.





3 Different SLAs for different situations

Setting SLAs for different situations increases the likelihood of non-conformance issues being dealt with appropriately.

Ensuring that a batch of tainted milk doesn't get out to the public is much more urgent than correcting some misprinted labels. By using decision pathways to route selections down various pathways, you can set up different response times, reminder frequencies and even levels of escalation.

As important that it is that high-priority issues get the urgency they deserve, also ensure lower-priority items are dealt with correctly. If you treat everything as urgent, your employees will desensitize to that urgency over time and your risk of missing SLAs will increase.

Why you should be automating this process

The potential ramifications of a poorly designed non-conformance process are huge. Inventory write-offs, missed delivery dates, legal costs. The list goes on.

Automating your non-conformance process A) forces you to formalize an effective process that everyone follows, B) ensures the correct steps are taken in the event of non-conformance and C) helps you prevent issues repeating themselves again and again.

CLOSE THE LOOP (AND PROVE IT)

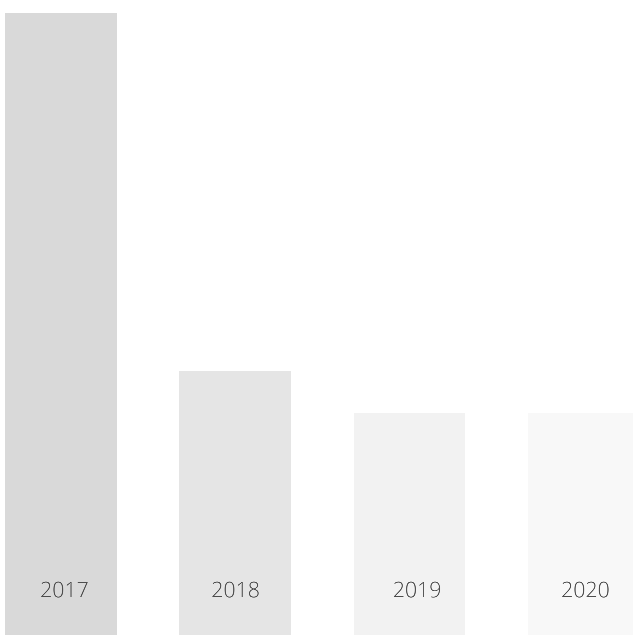
Make sure that corrective actions are undertaken and reviewed. Automatically time-stamp and user-stamp every action in the process to ensure every action can be tracked further down the line.

DECREASE YOUR RESPONSE TIME

By automatically routing every step of the process to the right person you will save valuable time. Eliminating scanned documents, manual handovers and double-handling.

IDENTIFY TRENDS WITH DATA

Use the data captured within your workflows to identify non-conformance trends and areas of improvement.



Continuously improve and track the reduction in incidents over time.

Incident Reporting

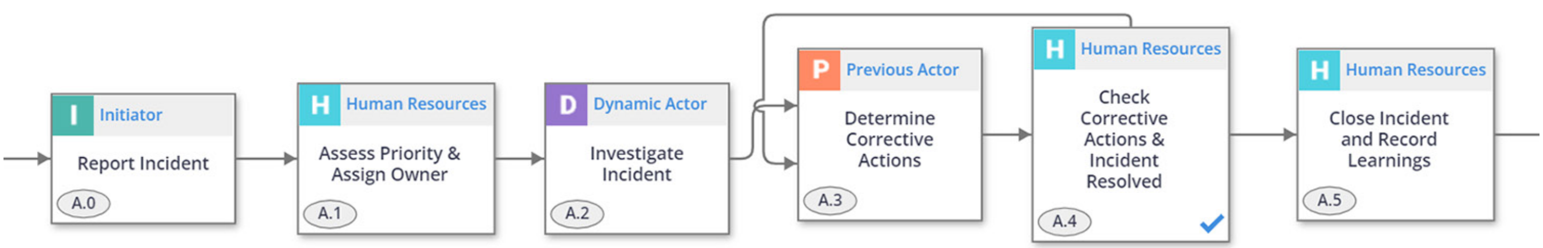
Incident Reports

It is essential that everyone who conducts work on any of your sites has the ability to log an incident easily.

A good incident reporting process comes down to two factors:

1. A user-friendly form that is easy to access and complete.
2. A clear, trackable, follow-up process to ensure corrective actions are taken.

Effectively reporting and managing incidents through to closure not only increases your compliance, it also makes sure that you are continuously improve your processes to prevent reoccurrence in the future.



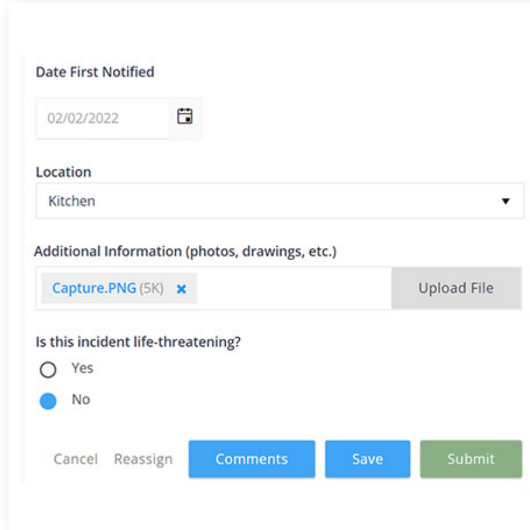
Best practices when building this kind of workflow:

1 Build the right form

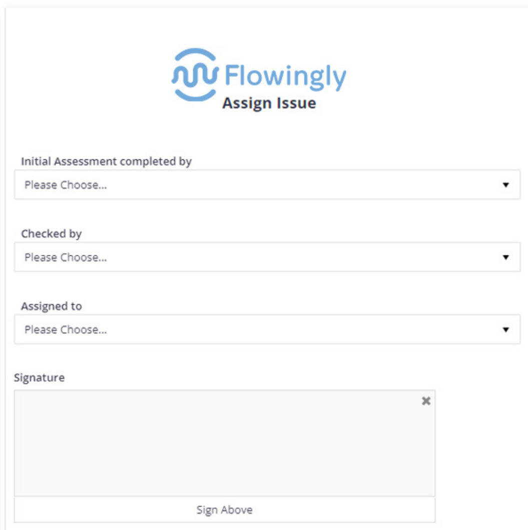
When putting together your Incident Report form, you need to consider a few things:

1. Where will people be able to find the form?
2. What devices will they access it on?
3. Who will be using the form most regularly?

These answers will affect the design of your form. For example, if the form will most often be accessed on mobile, make sure the fields are stacked in a single column (Flowingly does this automatically). If you're expecting production workers to complete the form in the middle of their shift, make it shorter so that they can complete it without rushing.



2 Assign ownership



When we encounter problem processes, one of the most common causes is a lack of ownership. Whether that be ownership of the process as a whole, or ownership of specific steps within the process.

By assigning ownership of the investigation to an individual, you can be sure that their will be no finger-pointing and "I thought Joe was doing it...".

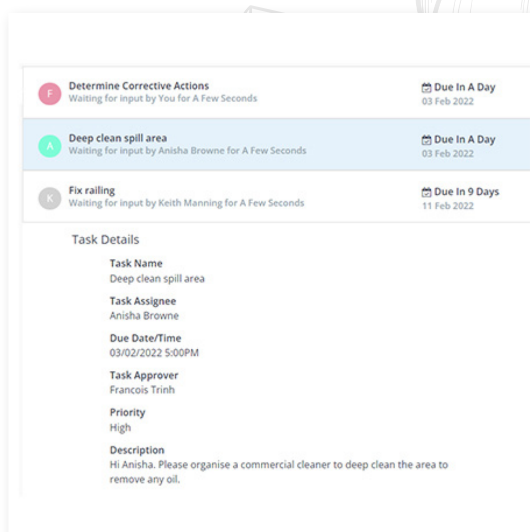
If you're using a platform like Flowingly, you will be able to set rules that automatically assign ownership, or allow for manual assignment.

3 Set unique corrective actions

Every incident is different. So it stands to reason that the Corrective Actions will be different for each incident. A slip in the cafeteria is going to have very different Corrective Actions to someone getting their arm stuck in a conveyor.

For this reason, we recommend giving the Incident Owner the ability to dynamically set Corrective Actions on the fly. This way they can assign actions to a range of employees, whether that's the Head of Operations needing to raise CAPEX to replace an aging asset, or the Maintenance team needing to fix a loose stair.

That's exactly what our team had in mind when they designed the Step Tasks feature in Flowingly. The ability to assign tasks dynamically.



Why you should be automating this process

Compliance, compliance, compliance. There are all sorts of reasons to automate this process, but the number one is to build a digital record that can be accessed at any time. So that next time the auditors come knocking, you can pull up the records they need, from incident logs to evidence of corrective actions, in seconds.

MAKE IT EASY

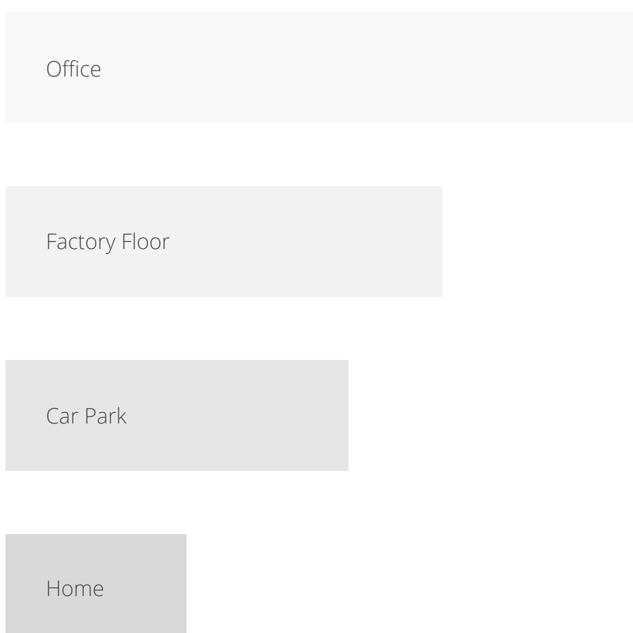
Your employees will be much more likely to log an incident when it only takes them a few minutes. Make it easy for them to access on mobile, tablet or PC. Enable them to take a photo of the incident, instead of writing an essay.

CLOSE THE LOOP

Access any incident with a click. All records will be logged in full, with remedial steps, approvals and comments all assigned and tracked in real-time. Save time pulling files or searching for emails.

CONTINUOUSLY IMPROVE

Incident reports should provide a clear picture on what the organization should focus on resolving. Through follow-up activities you will identify what needs to be changed, improved or eliminated.



Identify trends within your incidents to help focus your attention.

New Product Development

New Product Development

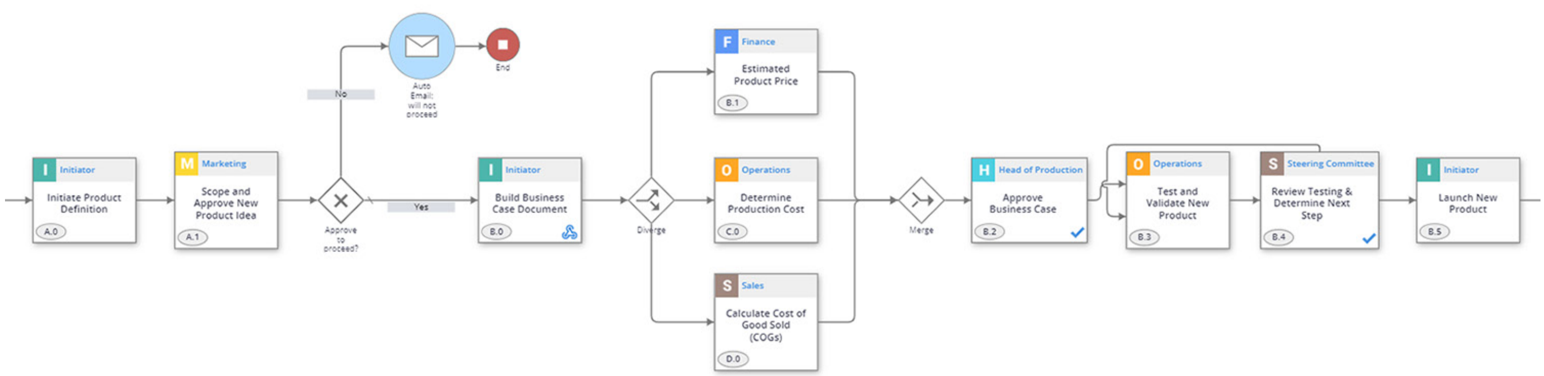
There is nothing more exciting and terrifying than a flagship product launch.

But how do we make sure a new product is a success?

Traditionally most NPD initiatives use a business case, project folder, Excel spreadsheet and maybe a Trello card. With so many stakeholders, progress meetings and documents, it's no wonder that this often leads to red flags being missed, regular delays and a whole bunch of overtime.

The workflow we've created here will guide the team through all necessary activities so that all new product developments follow a standard process.

This way we ensure compliance with regulations, keep all stakeholders on the same page and effectively communicate any delays. End-result? A well thought out, well-orchestrated new product.



Best practices when building this kind of workflow:

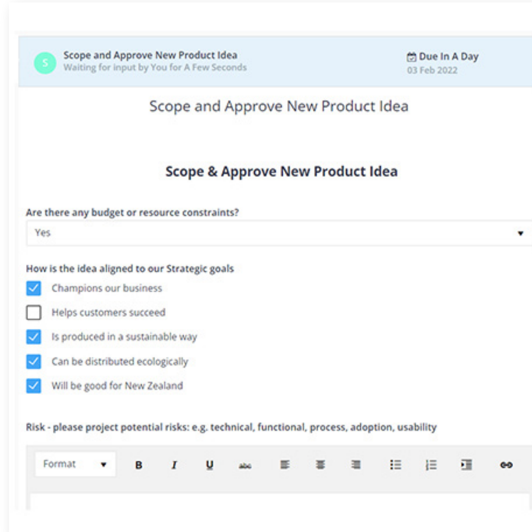
1 Involve key stakeholders early

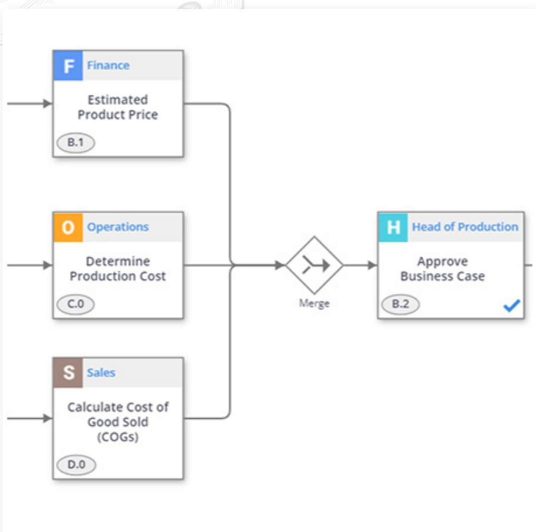
Any new product development process should aim to get to the truth as early as possible.

If marketing thinks the product is completely off-brand. If finance says the margins don't stack up. If sales don't think it will sell.

You'll want to know well before you build and test your prototype.

Having clear requirements early in the process, such as making sure the product is aligned with the companies strategic goals and meets your risk tolerance, will make sure that no-one wastes unnecessary time.





2 Keep it simple

New product development processes have a habit of becoming Frankenstein's monster. With so many stakeholders there is bound to be some politics involved.

So keep it simple. Then iterate.

To start with, ensure you're just capturing the essentials. Use approvals to establish gates at key points in the process. Ask for essential input on why the product shouldn't proceed. Get the various experts to do their assessment.

Keeping the workflow simple makes it easier for teams to start using it effectively. From there you can capture feedback on how it could be further improved.

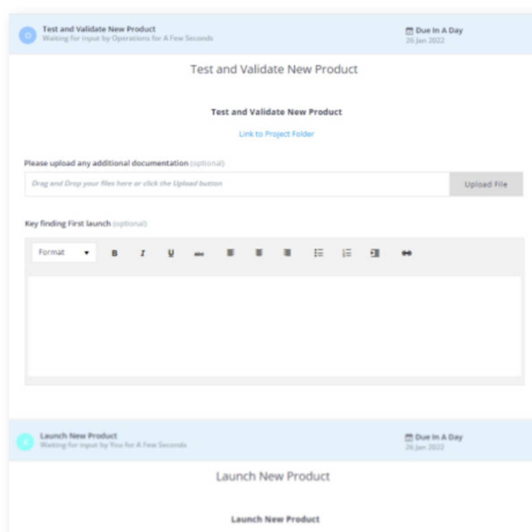
3 Integrate your key systems

Following the approval of the product, you'll need to launch it for real.

At this point you might be using a project management tool such as Monday, Trello or Asana. Or even Excel. With Flowingly, you can make sure that actions such as creation of a project card or SharePoint folder are triggered at key points in the NPD process.

This reduces double handling and eliminates the chance of that step not being actioned.

The same goes with updating your systems of record throughout the process. At any point you may want information captured in your workflow to sync with your other systems.



Why you should be automating this process

Some of us are launching hundreds of new products a year. Some only a few. Whatever the case, it's important that we follow a standard process every time. That way we're not reinventing the wheel and are able to apply improvements to the process as we go.

Automating this process means that you can ensure that the right process has been followed each and every time. If issues arise, you can go back and see exactly where and why. Then you can add those learnings into the workflow to make sure it doesn't happen again.

By automating this process, we can make the admin side of things as easy as possible. Freeing up more time for creativity and quality work.

ENSURE CONSISTENT OUTCOMES

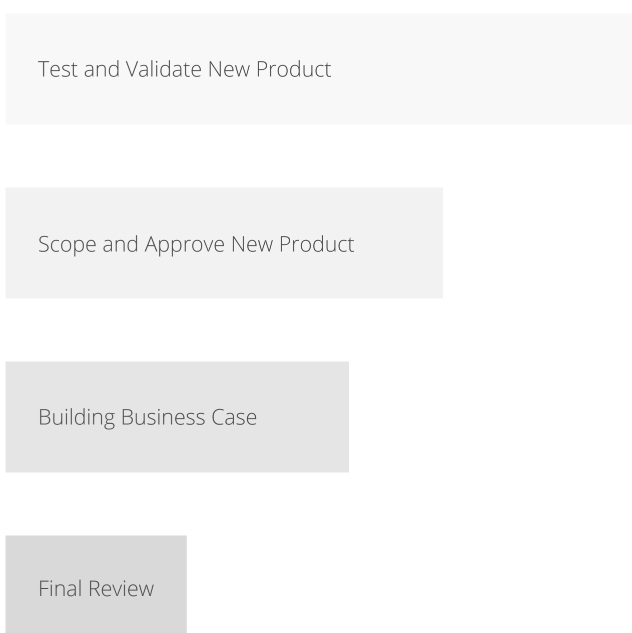
Whether a new product idea proceeds or is canned, make sure the same due process is followed every time and achieve consistent outcomes.

KEEP EVERYONE ON TRACK

Give stakeholders a clear idea of what they need to do and when. Giving them clarity over the process will break down siloes.

REDUCE THOSE EMAIL THREADS

By automatically notifying stakeholders, managing approvals and triggering actions in other systems, you will reduce progress meetings and email usage significantly.



Time taken per step

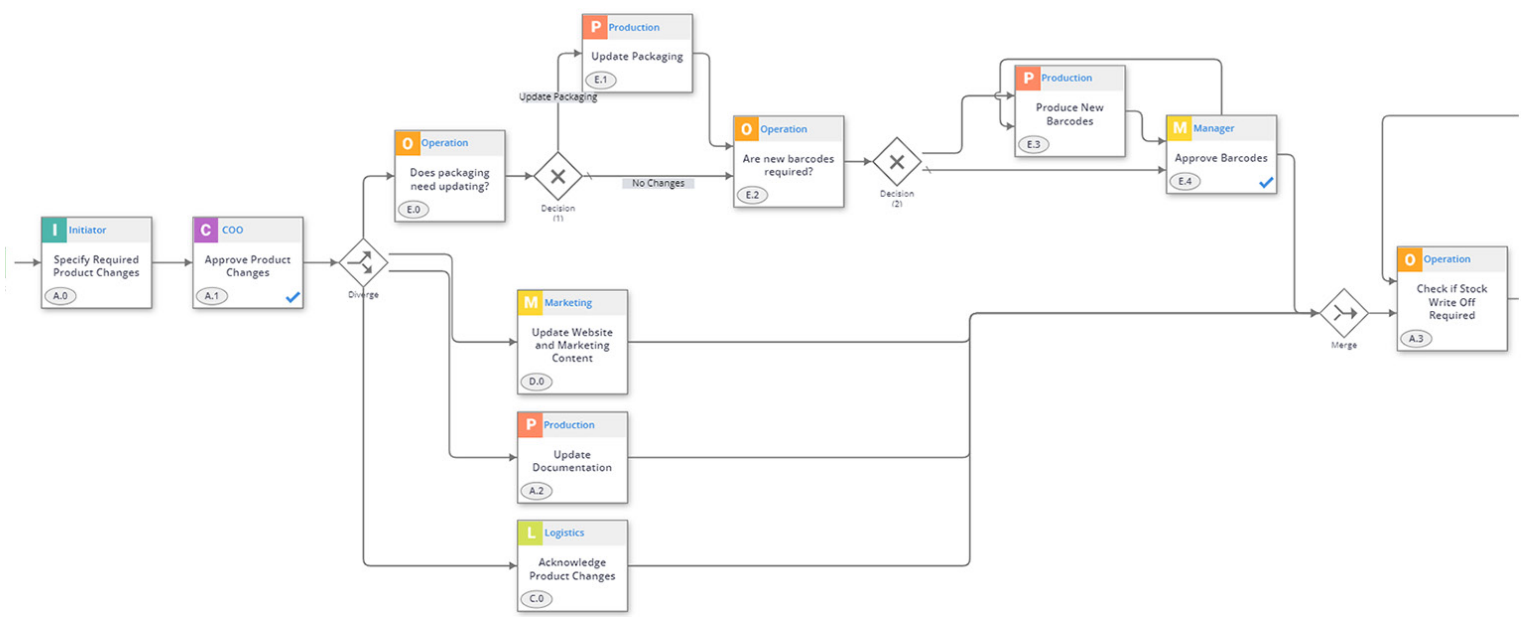
Product Changes

Product Changes

You've just updated a product. It's a small enough change. Nothing should go wrong. Right?

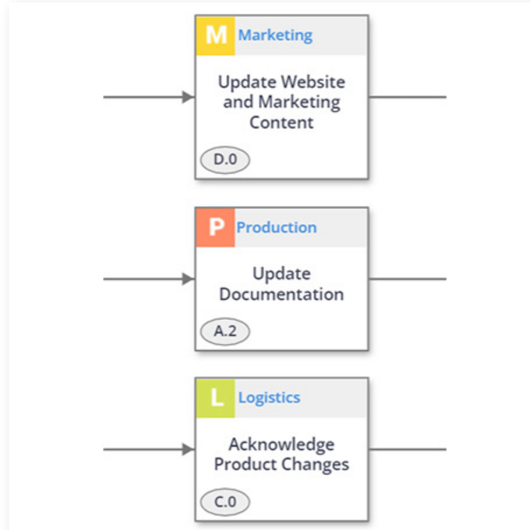
Product changes don't come with the same level of excitement as new products. This can be the reason that simple updates are often the most painful. Like NPD, there are a number of crucial steps that need to happen when changing a product.

A product change may seem like a simple process, but it involves many moving parts. When it goes wrong you are left with stock overflowing in the warehouse and angry customers. This workflow makes sure that all the right steps are taken when a product changes, so that the changeover runs smoothly and that everyone from the product team right through to your customers are left smiling.



Best practices when building this kind of workflow:

1 Get agreement on what is required

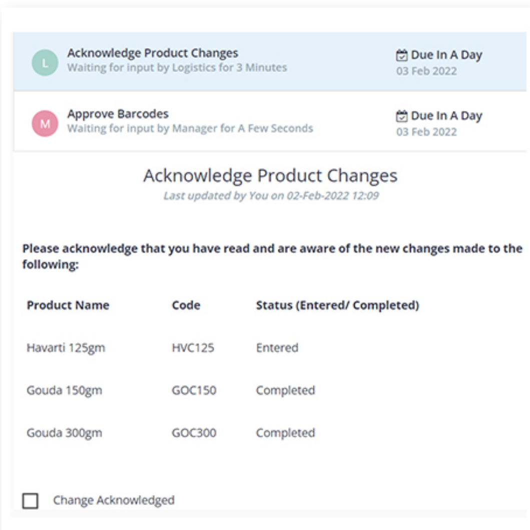


Get agreement on what info needs to be passed down the line. This way you reduce confusion and double handling.

Things like:

1. Making sure that marketing has all the information they need for the website.
2. Ensuring that the production team has the packaging specs.
3. Knowing when finance needs to be alerted to start writing off stock.

By formalizing this process you will get everyone on the same page and start breaking down those siloes.



2 Keep it simple

Some companies can have a dozen product changes happening at once. Keep it simple to reduce confusion across your stakeholders.

Have clear subjects and fields within your forms. Ensure only essential information is provided. Give stakeholders visibility to see where the process is sitting. Add regular approval gates for sanity checking.

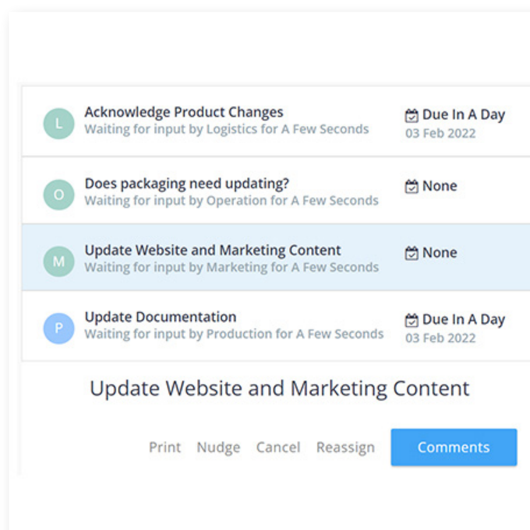
Doing this will free up loads of time for your employees where they used to trawl through their inbox and call impromptu meetings just to understand what they need to do.

3 Build steps in parallel

There are so many actions that need to take place during a Product Change that we can't afford a delay in one area to snowball and create further delays down the line.

Where possible, make sure that steps can happen at the same time, rather than being dependent on one another. This way the Operations team don't have to wait for Marketing to update the website before they load up the new barcodes.

The most effective way to manage a process like this is with the majority of steps in parallel with regular gates where the process merges back into one. Most often, these gates will simply be an approval asking the decision maker to run over the entered info and make sure everything is on track.



Why you should be automating this process

The cost of stuffing up a product change is high. You may miss out on potential sales. Destroy the relationship with a customer. Have your staff working long hours.

Automating this process means that not only do you ensure that doesn't happen, but you can improve the efficiency of the process itself. No more sitting in progress meetings to see if everyone is on track. No more confusing cc'd email threads. No more missing info. Just a streamlined workflow that gets everyone on the same page.

ACHIEVE CONSISTENT OUTCOMES

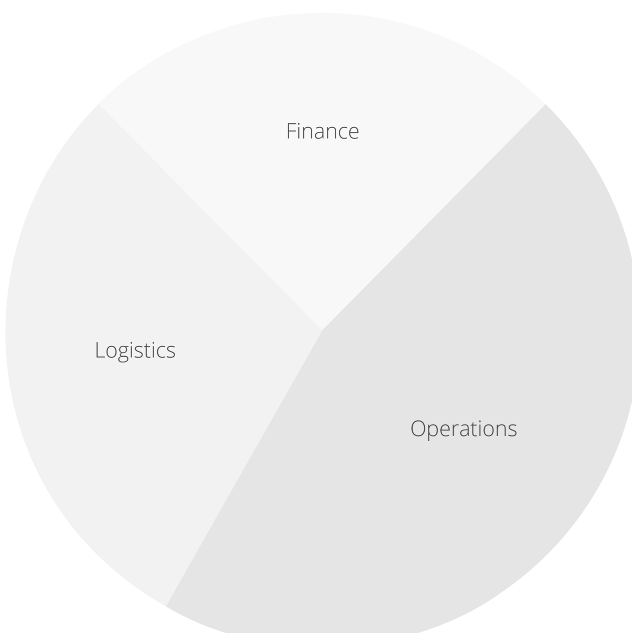
Achieve the same outcome every time: a smoothly transitioned product. Packaging reworked. Website updated. Barcodes logged in the system. Stock transitioning on shelves. Simple as that.

KEEP STAKEHOLDERS IN THE LOOP

Ensure that the relevant stakeholders are aware of upcoming product changes, updates and timings so that no one is blindsided.

IDENTIFY BOTTLENECKS

Use the data captured across a number of product changes to identify bottlenecks within the process. Then work to fix them.



Overdue step by department

Flowingly is the process and workflow platform trusted by 100,000+ users across both the public and private sectors.

To see how Flowingly could help your organization, book your demo now.

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