Design: Identify your workflow building blocks

1. Sheet: This is the “home base” where all of your data is stored.
2. Forms: Forms can be used to collect data and information from anyone and can be sent via email, hyperlinks, and even published to a website.
3. Sheet Summary: This refers to the rollup of key information from your original sheet, which help to display key metrics and data points on a dashboard.
4. Content Collaboration: Manage and review approval processes for all assets directly within the process to streamline review rounds and respond to feedback quickly.
5. Reports: Pull data from multiple different sources to create high-level reports that answer key business questions.
6. Automation: Use automation within your processes to simplify your workflow and streamline repetitive, manual tasks, like review requests, update requests, and status updates.
7. Dashboards: Build dashboards to surface key metrics across a program or process without exposing underlying data, and use it as a central source of truth that team members and stakeholders can reference.

Example Workflows

1. Project tracking workflow: This workflow helps you streamline the way you track and manage your projects. Start by creating a project plan sheet for each project that you can then roll up into either a milestone report or an at-risk task report, depending on project status. Then, surface these key metrics into a high-level dashboard to gain visibility into all project-related items.
2. Request management workflow: This workflow helps capture and act on requests quickly and effectively. Create a form that requesters can fill out that will then filter into a tracker sheet. Then, build a report to surface key metrics that then rolls up into a dashboard for increased visibility into all requests that come in and their status.
3. Meeting management workflow: To hold better, more efficient meetings, use this workflow to build an end-to-end task sequence. Start with a form where people can submit agendas that then feed into an agenda sheet. Then, create two separate reports; one for future agenda topics and one for past agenda topics. Surface all future and past agendas into a portal that allows all team members to see what’s been discussed already and what’s coming down the line.