

# HOW TO WORK WITH YOUR SOFTWARE PRODUCTS & VENDORS TO AUTOMATE YOUR WORKFLOW



## 0. Diagram Your Workflow

This helps you illustrate your workflow, & offer shared understanding between you & your vendor.



## 1. Can the product do what I need?

Show the vendor your workflow. Ask them which parts the software can automate now.



## 2. What else can it integrate with?

Explore what other applications your software can integrate with to automate your workflow.



## 3. Is what I need on your roadmap?

Try to determine if you should wait for the product to be updated, and if so, for how long.



## 4. If you were me, what would you do?

Discover whether your workflow or process should be revised based on what the software *can* do.

See the next page  
for a helpful decision tree

