
Workflow Management Training Course: Handoffs, Work Allocation and Flow Limits

4 – 8 January 2027
New York





Workflow Management Training Course: Handoffs, Work Allocation and Flow Limits

Ref: 530_28513 **Date:** 4 – 8 January 2027 **Location:** New York **Fees:** 7900 GBP

Programme Summary

Workflow management is the subject of this one-week training course for managers and heads of function who run teams and services, ending in a workflow playbook for one team. Work often stalls between people, returns for correction and queues behind whoever shouts loudest. The programme maps how work really moves, removes handoff delays and rework, sets limits on work in progress and chooses what to automate, using examples from the participant's own team. Mars Training Centre UK delivers this programme on workflow management to mixed-organisation cohorts.

The Business Case

Teams without a managed workflow carry hidden queues, unclear ownership and repeated corrections, so deadlines slip even when everyone is busy and managers learn of problems late, after customers have noticed. Managers who see the flow of work, limit what is started at one time and agree allocation rules can promise dates with more confidence and redirect effort from firefighting to planned work.

- Turnaround Time: Shortens as handoff delays and waiting queues are located and reduced.
- Rework Volume: Falls as requirements and checks move earlier in the flow.
- Workload Balance: Improves as allocation rules replace informal requests.

Principles and Evidence Base

- Work-in-progress limits: They cap how much work a team holds at once so that items finish, and they frame Sessions 2 and 3.
- Process mapping: It records each step, owner and wait in the path of a piece of work, and it shapes Sessions 1 and 2.
- Workflow diagrams: They show decisions, handoffs and approvals in one view, and they support the design work in Sessions 3 and 4.

Intended Participants

- Managers who are accountable for the throughput and timeliness of a team or service.
- Heads of function who coordinate work that crosses several teams.
- Team leaders who allocate requests and chase their completion.
- Service and operations managers who answer for response times.
- Managers who must judge which tasks are ready for automation.

Typical settings include shared services, healthcare administration, banking operations and public service delivery.



Learning Outcomes

1. Participants will be able to construct a map of how work moves through a team, with owners, waits and handoffs.
2. Participants will be able to diagnose the causes of delay, rework and uneven workload.
3. Participants will be able to evaluate where work-in-progress limits would help items finish sooner.
4. Participants will be able to design allocation rules that balance load and protect urgent work.
5. Participants will be able to prioritise tasks for automation by effort saved and risk introduced.
6. Participants will be able to justify a workflow change to colleagues and senior managers.

Programme Structure

Day 1: Seeing Workflow Management as Flow

How does a single piece of work travel through a team, and where does it wait?

- Work Item Journey Sketch
- Step, Owner and Wait Register
- Process Mapping Conventions
- Demand and Arrival Pattern Log
- Flow Efficiency Calculation

Day 2: Diagnosing Delay, Rework and Overload

What causes work to stall, return or pile up on a few people?

- Handoff Delay Analysis
- Rework Loop Tally
- Queue and Backlog Profile
- Workload Heat Map
- Work-in-Progress Count by Stage

Day 3: Designing Limits, Allocation and Handoffs

How are limits, rules and clear handoffs set so that work finishes in order?

- Work-in-Progress Limit Table
- Allocation Rule Sheet
- Handoff Checklist
- Urgent Work Lane Policy
- Workflow Diagram of the Redesigned Path



Day 4: Automation Choices and Daily Control

Which steps merit automation, and how is the flow managed day to day?

- Task Automation Screening Grid
- Exception Handling Rules
- Daily Flow Board
- Cycle Time Trend Chart
- Weekly Flow Review Agenda

Day 5: Building the Workflow Playbook

Do the map, limits, rules and controls hold together for one team?

- Applying the Session 1 Sketch to Your Own Team
- Testing the Session 2 Tally on Live Requests
- Checking the Session 3 Limit Table Against Real Demand
- Rehearsing a Session 4 Flow Review in Role Play
- Completing the Workflow Playbook

Methodology

The programme uses structured exercises built on anonymised request logs, queue counts, handoff records and short cases from shared services, healthcare administration and banking operations. Participants work in small groups on a team of their own, build maps from real records, challenge one another's limits and rules, and receive facilitator feedback on each artefact before it enters the playbook.

- Suggested activity: Mapping a recent request from arrival to completion and marking every wait.
- Suggested activity: Setting a work-in-progress limit for one stage and predicting its effect on turnaround.
- Suggested activity: Screening ten recurring tasks for automation and defending the top three.

Capstone Output

Each participant completes a workflow playbook for one team. It holds a work map, a delay and rework summary, a limit table, allocation rules, a handoff checklist, an automation shortlist and a review agenda. The playbook is used at work to brief the team, to start a daily flow board and to support a request for tooling or staffing.



Frequently Asked Questions

Is training in workflow management suitable for managers who have never mapped a process?

Yes. It assumes responsibility for a team or service and builds workflow management from a single work item upward, with no process-improvement background needed.

Which practices does workflow management rest on in this programme?

It rests on work-in-progress limits, process mapping and workflow diagrams, applied through the allocation rules and review routines each participant designs.

How is the playbook for workflow management used at work?

You use it to brief your team, start a daily flow board and support a request for tooling or staffing with evidence from your own map.

How does learning workflow management differ from a course on process reengineering?

It centres on day-to-day flow, limits and allocation within a team, while process reengineering centres on redesigning end-to-end processes across an organisation.