Whiteboarding Worksheet

1) List all the actions/ todo items completed by anyone in your office throughout this process under "Tasks."

2) Number the Tasks based on when they need to be completed. If they can be done at the same time as another task and do not depend on order, list the same number for more than one Task under "Steps."

3) List the Steps that the current Step could lead to under "Outcomes."

4) Input your Workflow into the CRM and assign the Tasks to Teams!

TASK: **STEP:**   **OUTCOME(S):**