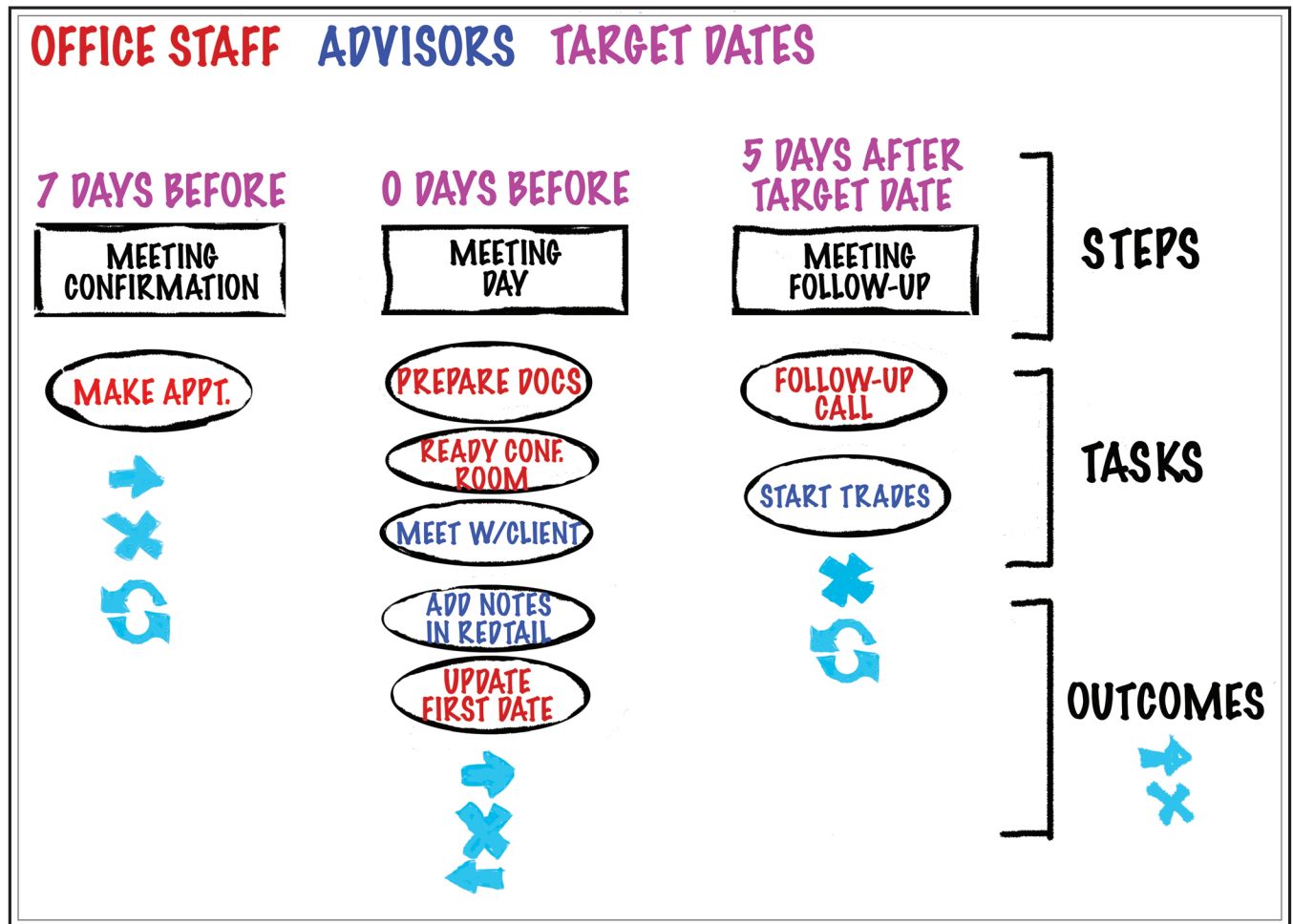


Whiteboarding

This is an example of how whiteboarding works:

Key Players: Office Staff, Advisors

Objective: Create system steps for the Annual Review



Key:

□ Black Rectangles represent a step

○ Ovals represent tasks, and are colored based on whether the staff or the advisor are the owner.

LIGHT BLUE symbols represent Outcomes

→ pushes to the next step

← sends back to a previous step

× Ends workflow immediately

↺ Restarts the step - in case you need to notate why a step is taking longer.

PURPLE TEXT represents days after or before a step is due to be handled based off of the target date.



Now you try:

Key Players:

Objective:

Target Date:



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