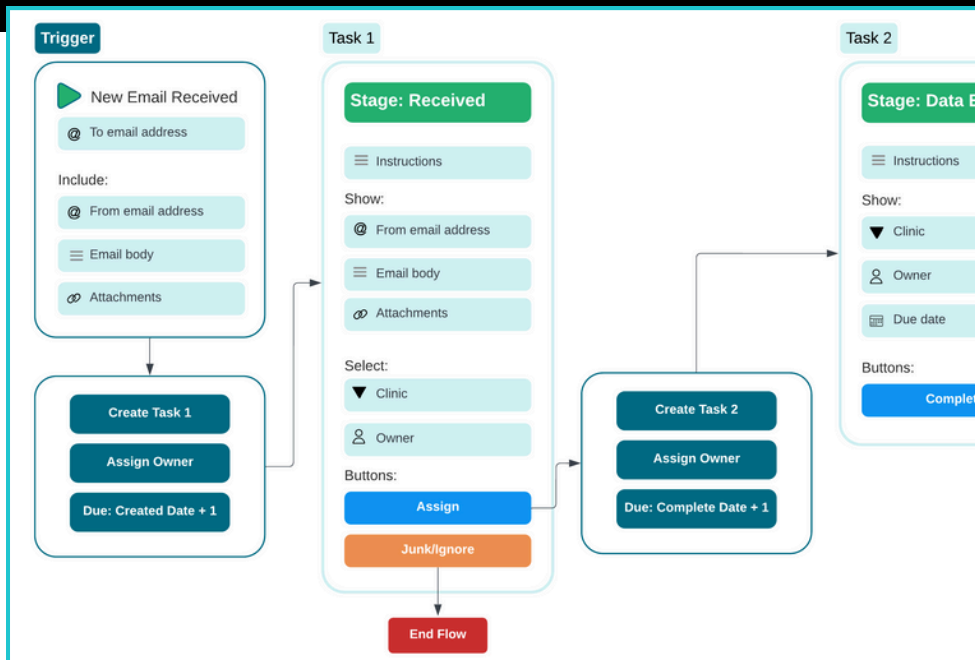


OptimallyFlow

OptimallyFlow allows operations teams to standardize high-volume, repetitive tasks through workflow automation and task management. Reporting and capacity planning capabilities provide visibility into where work is ahead or falling behind, enabling quick decision-making.



OptimallyFlow boosts ROI by improving productivity, reducing costs, boosting quality, & enabling a scalable & satisfied workforce

- Enhanced Productivity & Efficiency
- Reduced Operational Costs
- Improved Resource Utilization
- Enhanced Quality Control
- Greater Scalability of Operations
- Increased Accuracy & Accountability
- And More...

Challenges

- ✗ Project management systems & spreadsheets aren't designed for high-volume work, leading to inefficiencies
- ✗ Difficulty reducing administrative work related to managing the process
- ✗ Lack of visibility & accountability for tasks

Solutions

- ✓ Automate workflows to assign tasks, set due dates, and label with drag-and-drop simplicity and decision-based sequencing
- ✓ Empower your team with clear task instructions, due dates, and assigned responsibilities
- ✓ Obtain a high-level overview of completed, past-due, or upcoming work through dashboard & reporting

Questions to Consider

Do you manage work out of spreadsheets?

Do you have repetitive, predictable, & interdependent processes?

Can you easily see what work is getting done on time?

TABLE OF CONTENTS

Unlock the potential of OptimallyFlow with powerful solutions for every department. Discover how companies elevate their operations with our impactful templates and use cases

Use Cases

Custom Billing Process

Accounts Payable Process

Financial EOM Audit Process

Monthly Commissions Process

Employee Onboarding/Offboarding

Employee Training

Customer Onboarding

Customer Notifications (no CRM)

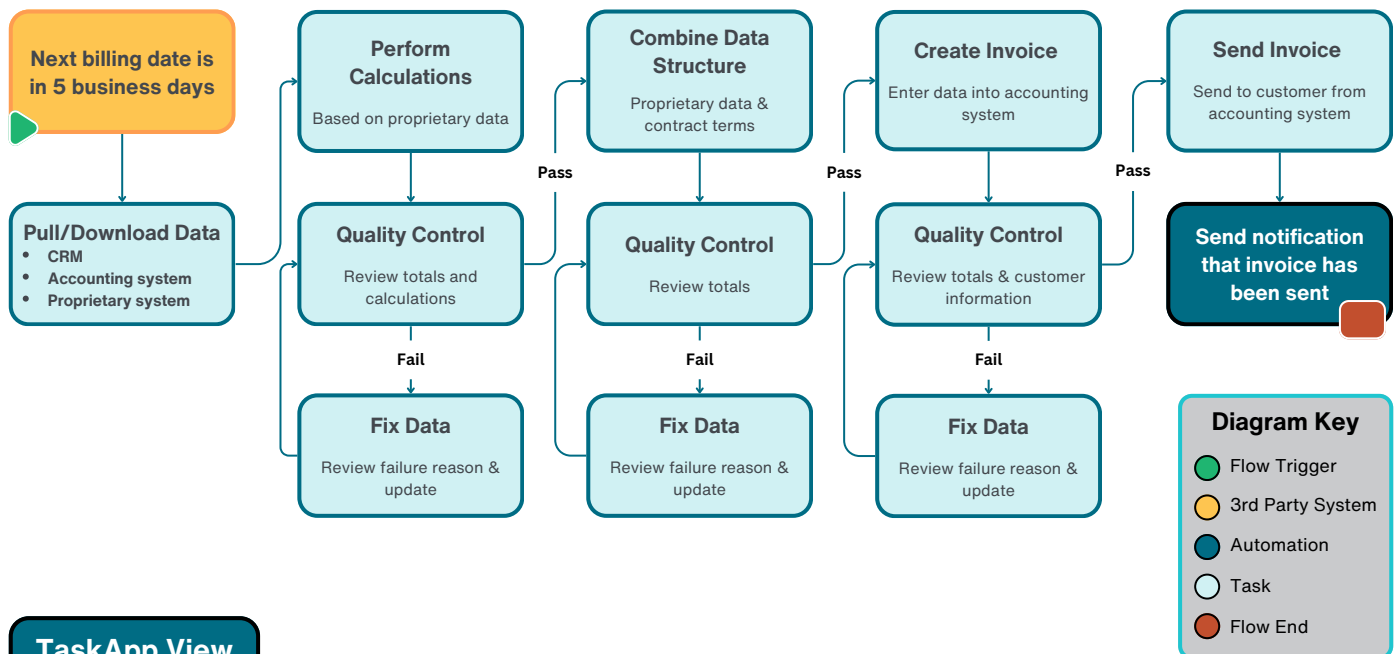
Claims Entry & Review Process

IT Ops Monthly Audit Process

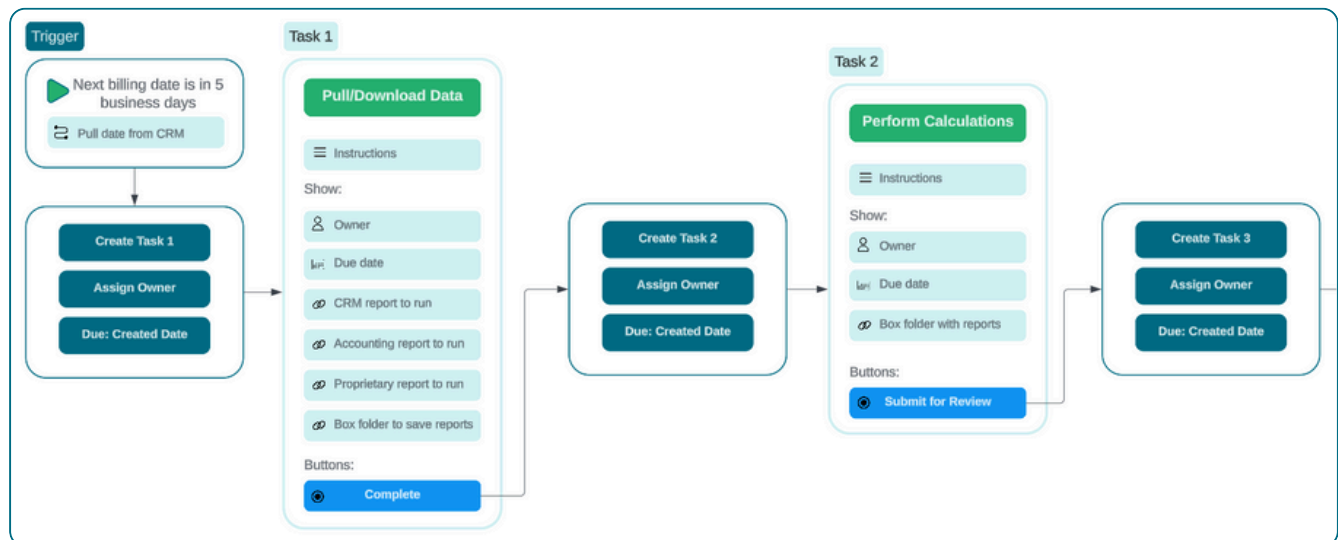
CUSTOM BILLING PROCESS

OptimallyFlow streamlines customer invoice creation, quality assurance, escalation, and sending, making invoicing faster and more accurate without complex data pulls or calculations

Overview

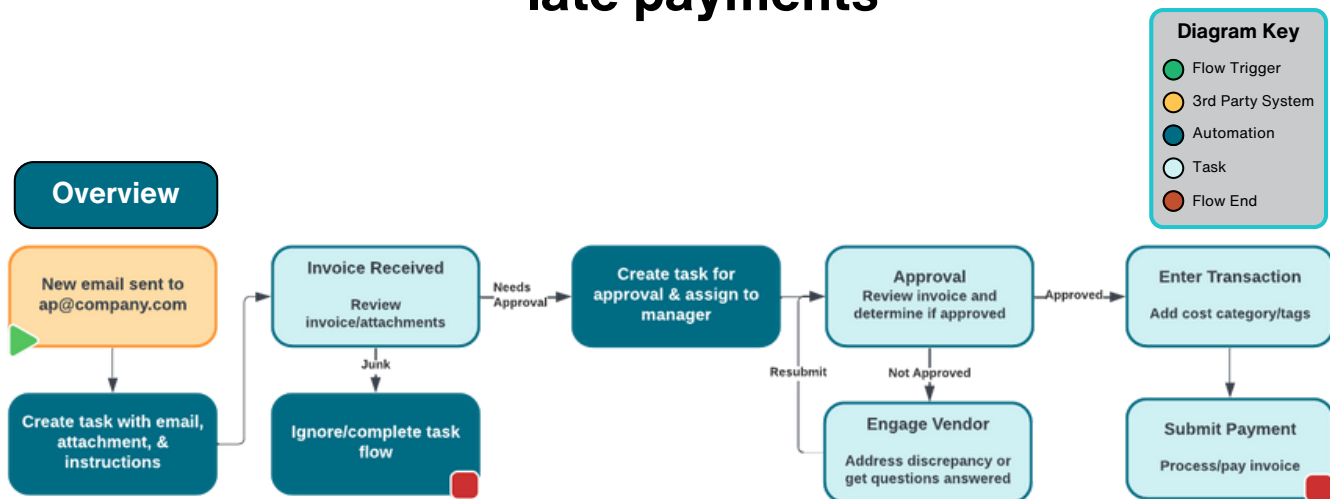


TaskApp View

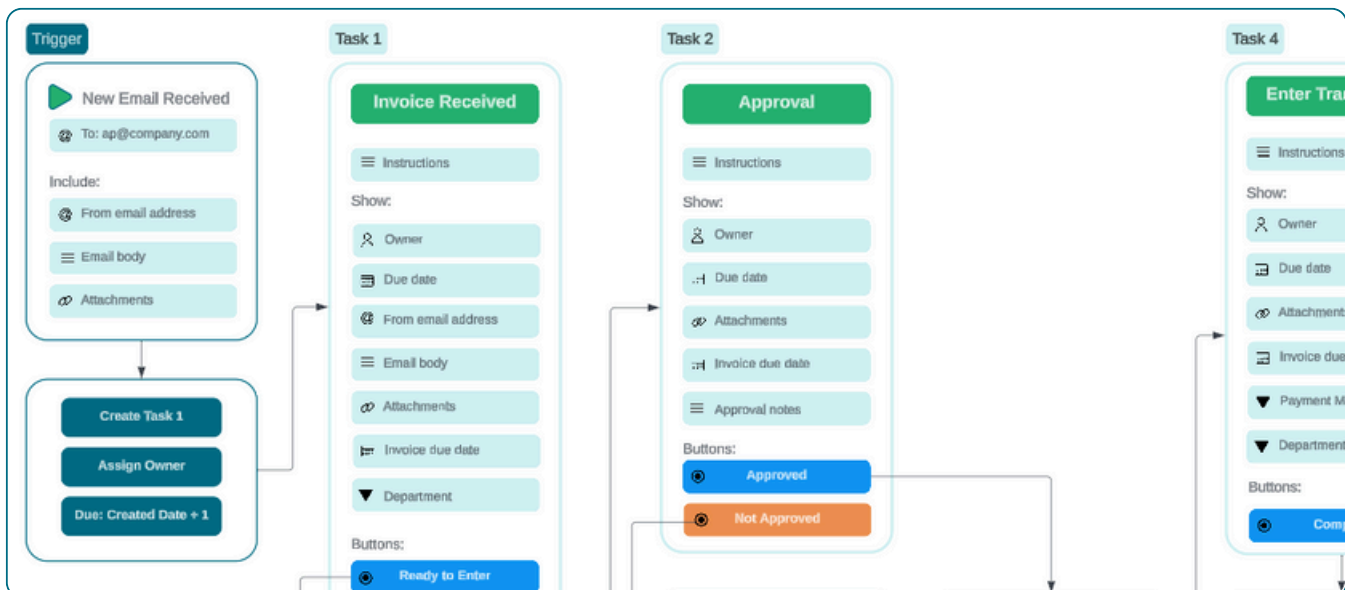


ACCOUNTS PAYABLE PROCESS

OptimallyFlow automates the triage of vendor invoices, streamlining approvals and follow-ups to enhance vendor relationships and reduce late payments



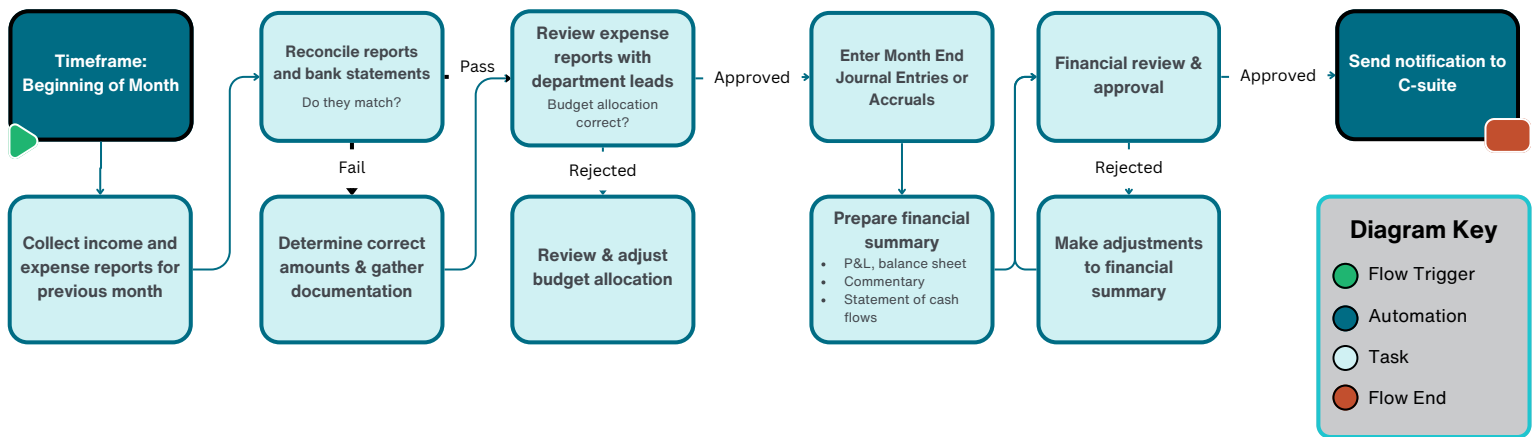
TaskApp View



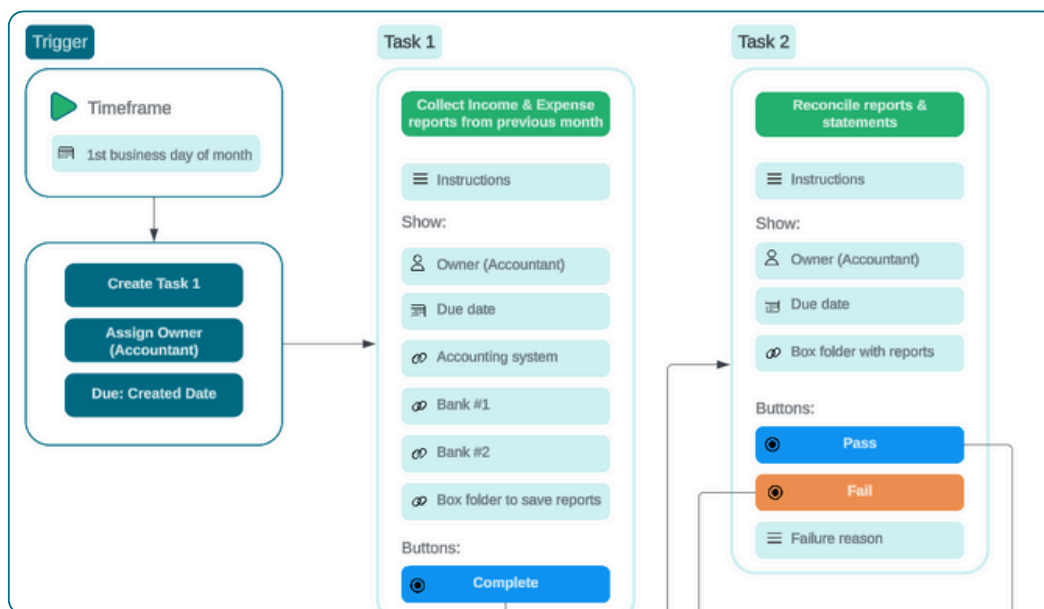
FINANCIAL EOM AUDIT PROCESS

OptimallyFlow provides structure for your end-of-month financial processes by simplifying approvals and ensuring timely, organized financial closures for SMBs

Overview

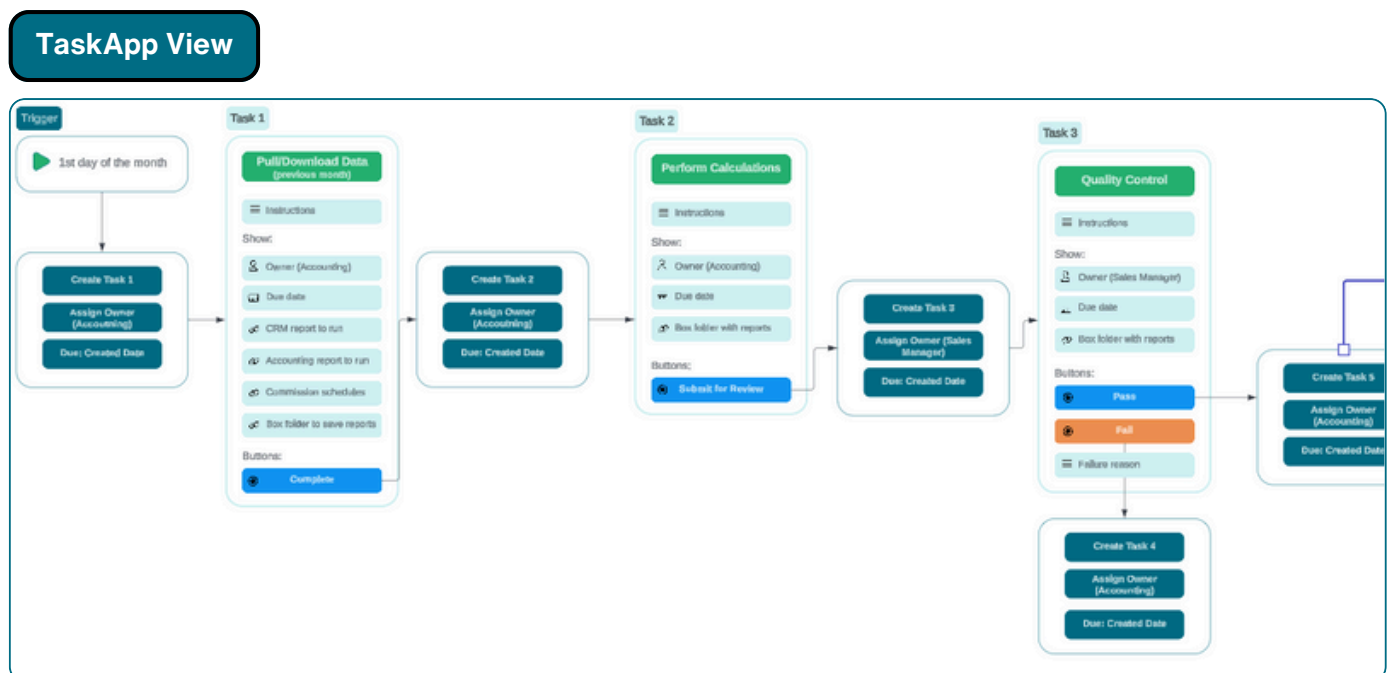
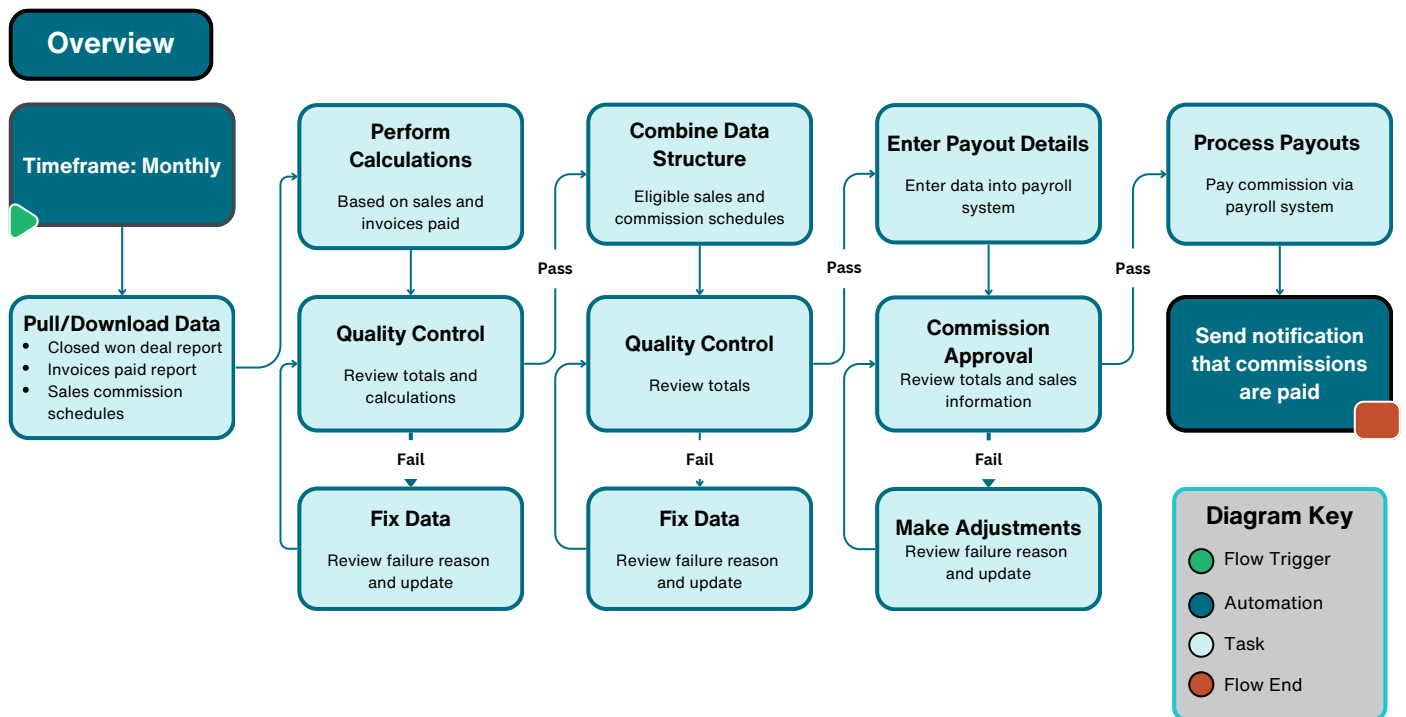


TaskApp View



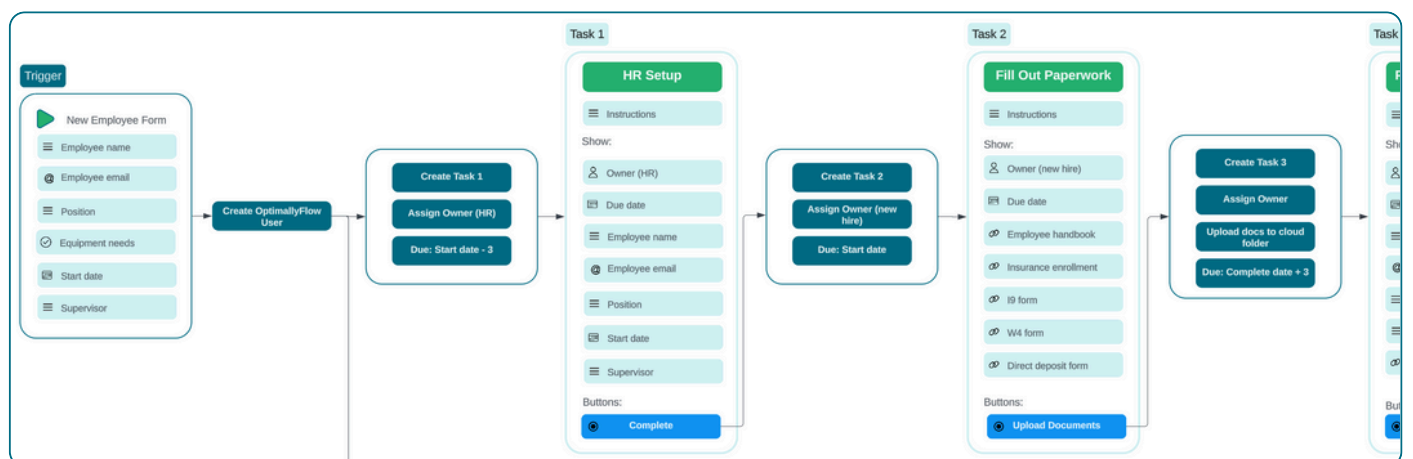
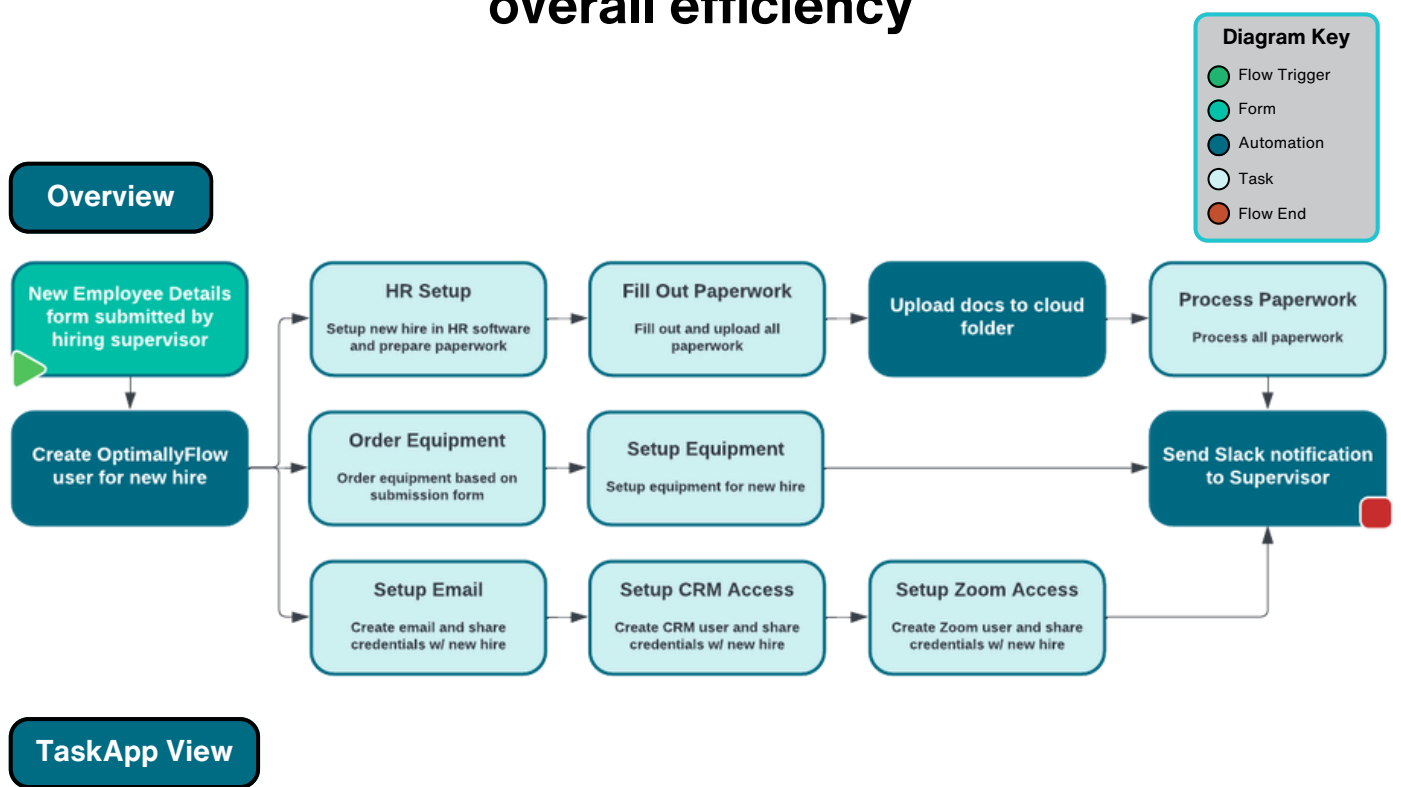
MONTHLY COMMISSIONS PROCESS

OptimallyFlow standardizes the commissions process for SMBs, maintaining a clear audit trail and ensuring timely, accurate payments to the sales team



EMPLOYEE ONBOARDING/OFFBOARDING

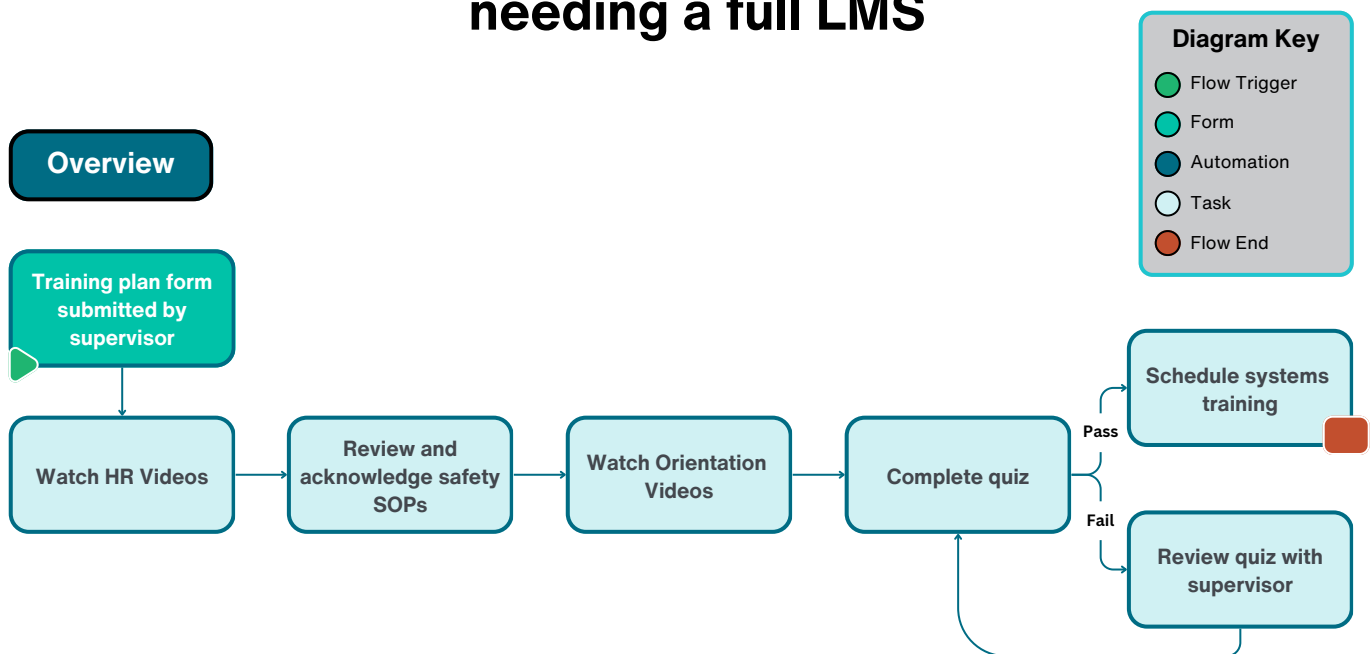
OptimallyFlow improves employee onboarding by streamlining task assignments, ensuring each step is completed on time by the right person, enhancing overall efficiency



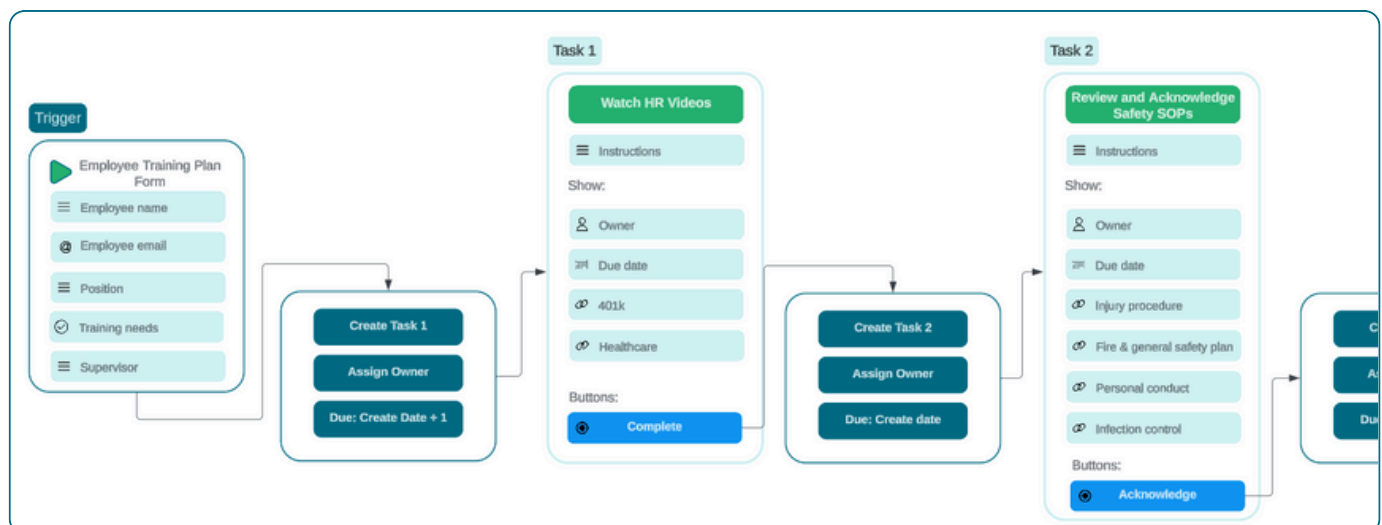
EMPLOYEE TRAINING

With OptimallyFlow, companies can easily standardize training plans, ensuring employees complete all necessary steps on time without needing a full LMS

Overview

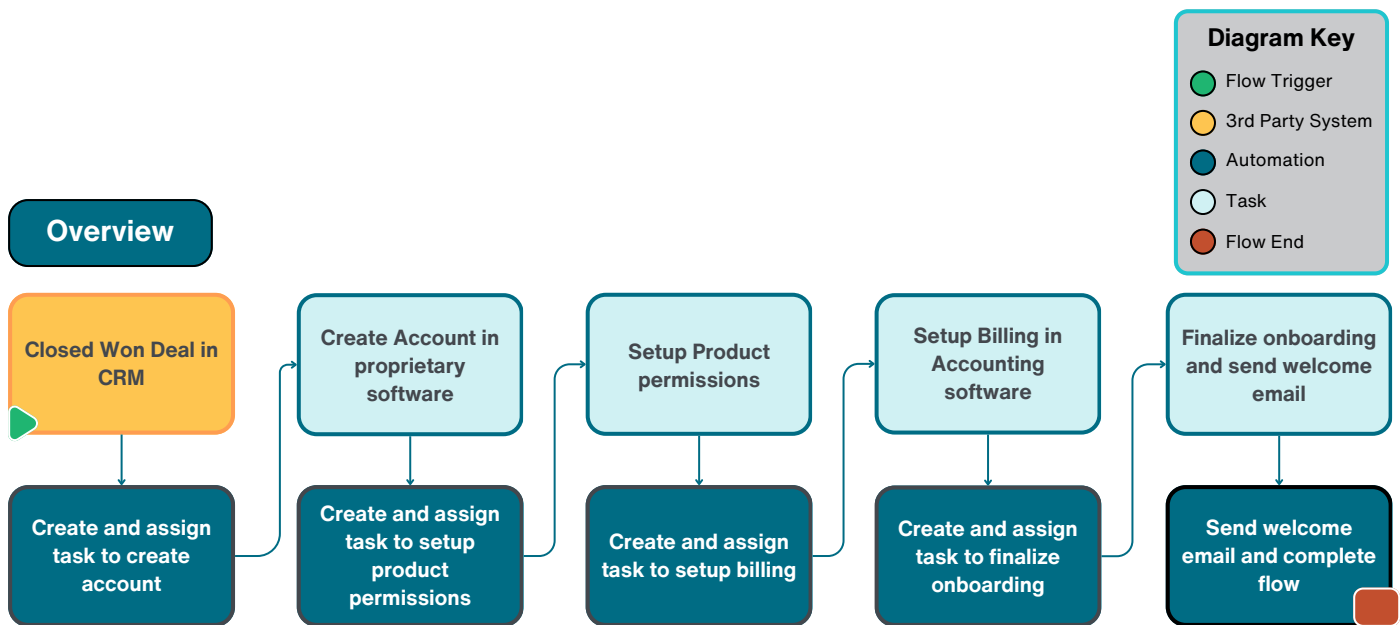


TaskApp View

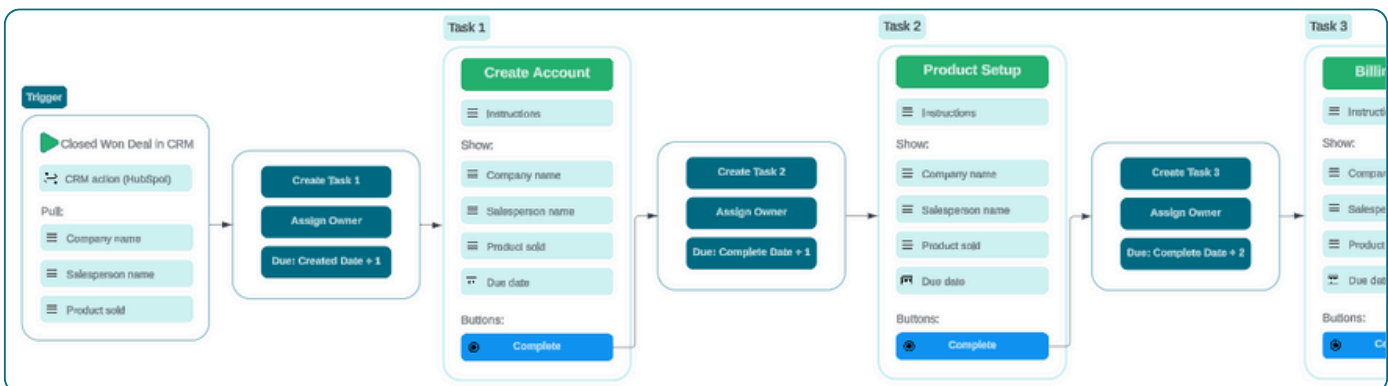


CUSTOMER ONBOARDING

OptimallyFlow provides visibility into the customer onboarding process and automates team hand-offs, ensuring a smooth, efficient onboarding experience



TaskApp View



CUSTOMER NOTIFICATIONS

OptimallyFlow enables companies to communicate product or service updates at scale efficiently, without the need for a full CRM system

Overview

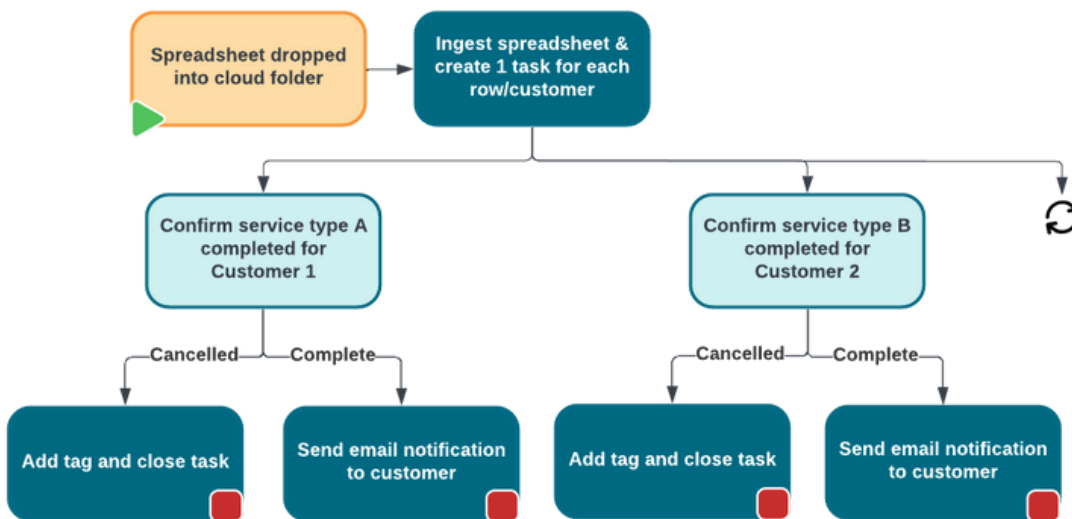
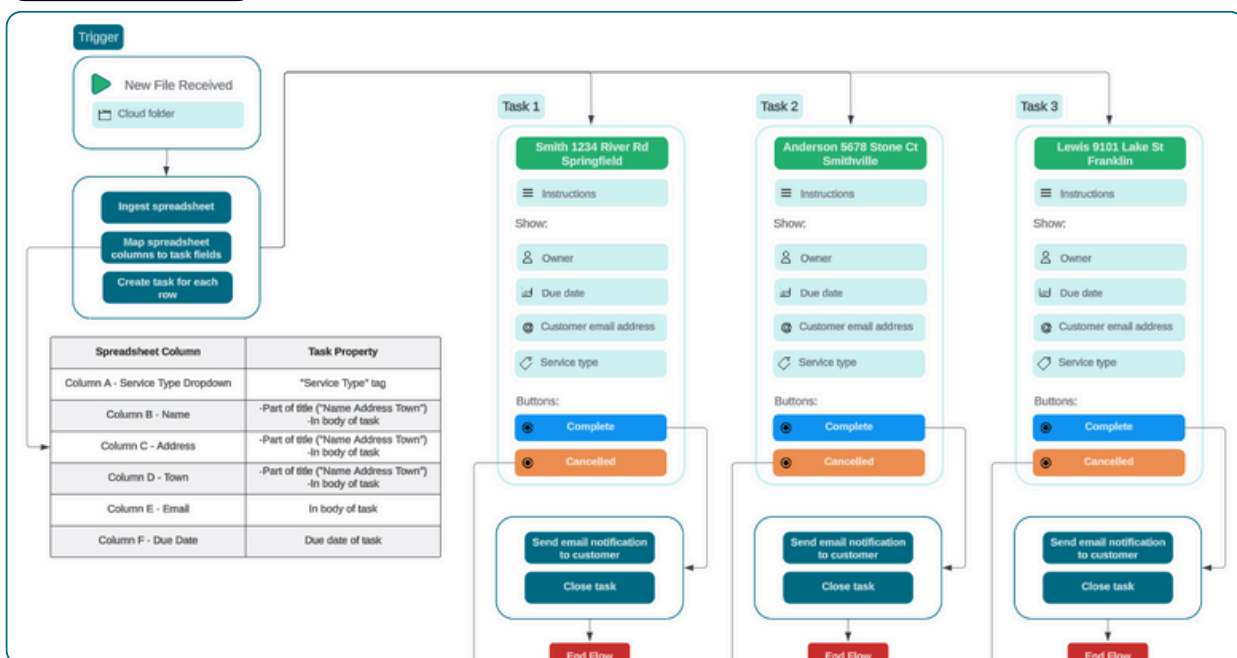


Diagram Key

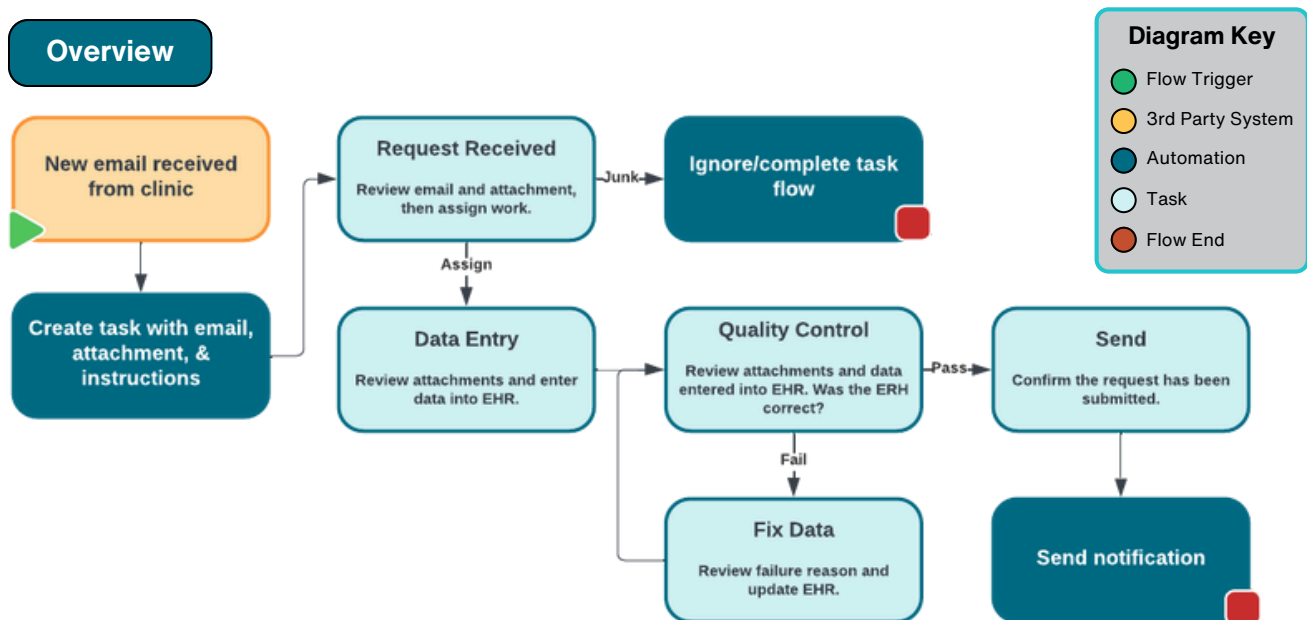
- Flow Trigger
- 3rd Party System
- Automation
- Task
- Flow End
- Repeat for all lines

TaskApp View

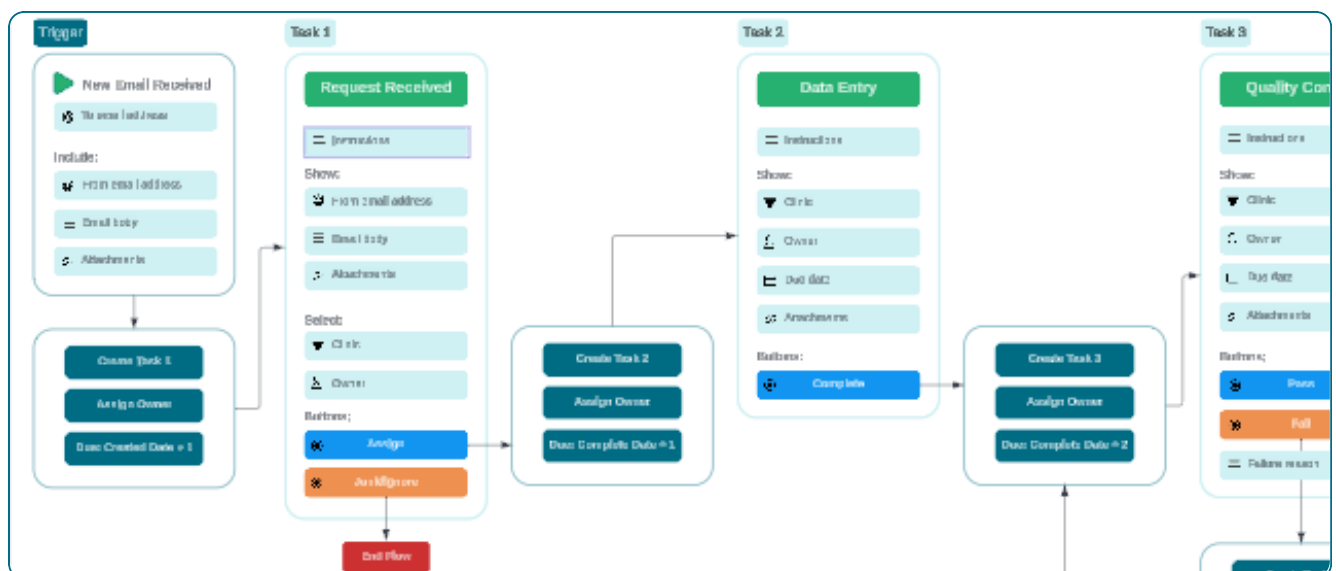


CLAIMS ENTRY & REVIEW PROCESS

OptimallyFlow streamlines the management of insurance and logistics claims by automatically creating tasks from incoming requests, improving quality control and accountability

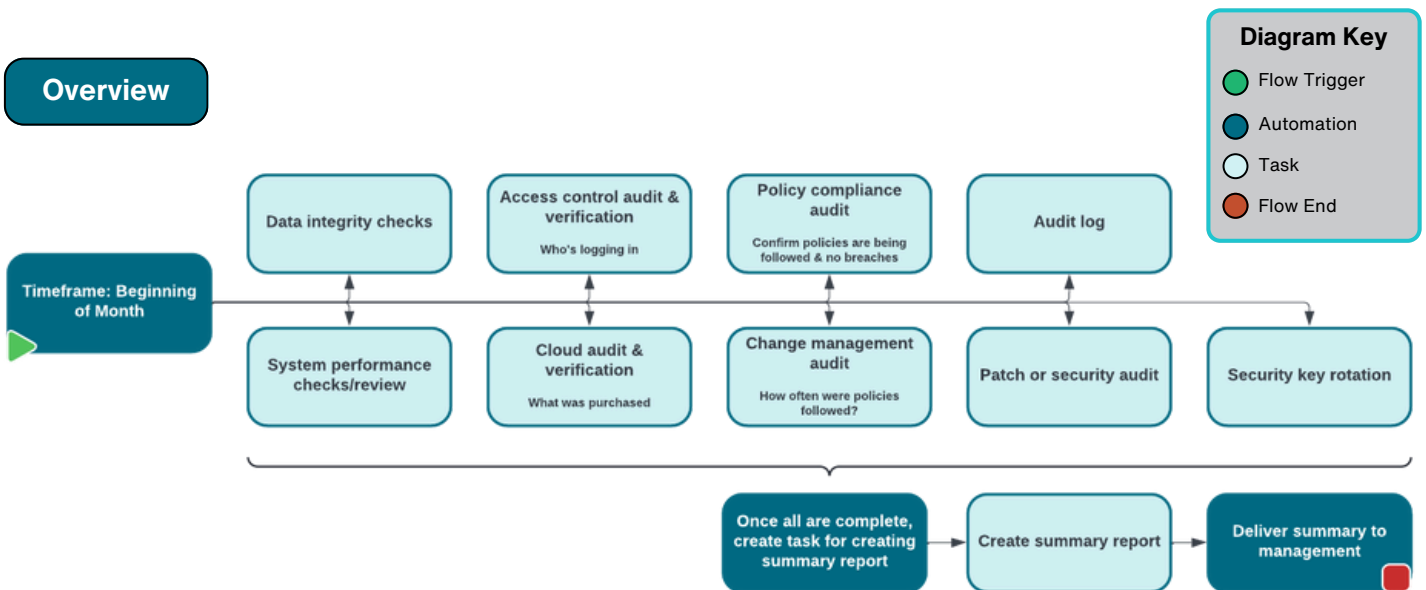


TaskApp View



CYBER SECURITY MONTHLY AUDIT PROCESS

OptimallyFlow helps SMBs establish a consistent auditing process for IT operations, ensuring regular checks for data integrity, compliance, cyber security, and maintenance with a detailed audit trail



TaskApp View

