Workflow Comparison Guide

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Quick reference showing what makes each workflow unique

Side-by-Side Comparison

Aspect	Financial Access	Membership Inquiry	Volunteer Interest
Primary Purpose	Governance & transparency	Information & joining	Engagement & service
User Type	Members only	Anyone	Anyone
Login Required	Yes	No	No
Recipient	Secretary-Treasurer	System Administrator	President
Recipient Email	figaro1226@gmail.com	wgmilleriii@gmail.com	lspitzer@nmsu.edu
Also CC'd	President + WF Manager	WF Manager only	WF Manager only
Response Deadline	14 days	**7 days**	14 days
Special Form Fields	**Document checklist**	None	None
Tone	Formal	Helpful	Welcoming
Handbook Basis	Section VI (required)	General membership	Committee participation
Oversight Level	High (President involved)	Standard	Standard

What's IDENTICAL Across All

These settings are the same for every workflow:

Response required: All need responses

Auto-CC originator: Submitter always copied

Closure approval: All require workflow manager approval

File uploads: Same types and limits for closure

Email notifications: Same notification types

Status tracking: Same status progression

Event logging: Complete audit trail

Why? Consistency = easier to use and maintain

The ONE Custom Field: Financial Document Checklist

Why Only Financial Has This?

Financial records are:

- Standardized (every organization has similar documents)

- Well-defined (ledger, budget, audit = specific things)

- Regulated (handbook requirements)

- Objective (document either exists or doesn't)

Membership/volunteer questions are:

- Varied (everyone asks different things)

- Exploratory (don't know what they don't know)

- Conversational (dialogue needed)

- Subjective (depends on individual situation)

Example:

Financial: "I need the 2024 budget" ← Specific document

Membership: "How does PMTNM help my career?" ← Open question

Volunteer: "I love technology and want to help" ← Personal exploration

Checkboxes work for financial. Free-form works for the others.

Response Time Differences Explained

7 Days (Membership) - The Sprint

Why faster?

- Information requests (not document gathering)

- Competitive advantage (other orgs exist)

- Conversion optimization (strike while iron is hot)

- Simple answers (usually)

Psychology: "Wow, they responded in 3 days! This organization is active and cares."

14 Days (Financial, Volunteer) - The Standard

Financial - why 14 days:

- Gathering physical/digital records

- May need to coordinate with accountant

- CPA reports might be periodic

- Quality matters more than speed

- Secretary-Treasurer has other duties

Volunteer - why 14 days:

- Thoughtful committee matching

- May need to consult chairs

- Identify best opportunities

- Coordinate introductions

- Quality placement > quick response

Recipient Selection Logic

Why These Specific People?

Secretary-Treasurer for Financial:

- Legal responsibility

- Access to records

- Financial expertise

- Handbook designation
- **Can't be anyone else**

System Admin for Membership:

- Database access
- Account management
- Technical knowledge
- Routine handling efficiency
- **President delegates this**

President for Volunteer:

- Strategic importance
- Personal touch
- Committee knowledge
- Leadership development
- **Too important to delegate**

Could Workflows Be MORE Different?

Yes! You Could Add:

Different Required Fields:

```
Volunteer:
- □ Areas of interest (checkboxes)
- □ Time availability (dropdown)
- □ Leadership experience (yes/no)

Membership:
- □ Membership type (individual/institutional)
- □ Teaching level (elementary/secondary/college)
- □ District location (dropdown)
```

Different File Requirements:

```
Financial:
- Require file attachments for closure (proof of delivery)
```

```
Membership:
- No files ever needed (info only)


Volunteer:
- Optional resume/CV upload
```

Different Approvers:

```
Financial → President approves closure
Membership → System Admin self-approves
Volunteer → President approves closure
```

Different Deadlines:

```
Financial → 7 days (faster for transparency)
Membership → 3 days (ultra-fast)
Volunteer → 21 days (more time for matching)
```

Current Design Strengths

What Works Well

Similarity is a feature:

- 	Users learn one system

- 	Predictable experience

- 	Less code to maintain

- 	Easy to add new workflows

- 	Consistent quality

Differences are intentional:

- 	Financial checklist serves governance

- 	Membership speed serves growth

- 	Volunteer routing serves engagement

- 	Access control (login) where needed

What Could Improve

Potential enhancements:

- Custom fields for other workflows

- Different closure approvers

- Workflow-specific templates

- Auto-escalation rules

- Priority levels

But: Start simple, add complexity based on actual needs.

User Perspective

From a Member's View

"I use workflows for different purposes, but they all work the same way:"

1. Fill out form

2. Get ticket number

3. Receive email updates

4. Track progress

5. Confirm completion

The differences (checklist, deadline, recipient) are invisible to workflow mechanics.

This is good UX - learn once, use everywhere.

Technical Perspective

From a Developer's View

One workflow engine handles all three:

```
WorkflowManager->createTicket($type, ...)
    ↓
WorkflowRouter->routeTicket($ticketId)
    ↓
Email sent based on config[type].recipient_routing
    ↓
```

```
Same status progression for all
    ↓
Same closure approval for all
```

Configuration-driven differentiation:

```
workflows_config.json determines:
- Who gets it (routing)
- How fast (deadline)
- What's required (fields)
- Who oversees (CC list)
```

Benefits:

- Add new workflow = add config entry

- No code changes for routing

- Consistent behavior

- Easy testing

Strategic Rationale

Why These Three First?

Financial:

- Legally required (handbook)

- High risk if mishandled

- Formal process needed

- Must get right

Membership:

- Growth driver

- First contact often

- Represents organization

- Must be welcoming

Volunteer:

- Retention strategy

- Leadership pipeline

- Engagement critical

- Deserves attention

These are the foundation. Other workflows can build on this base.

Evolution Path

Phase 1 (Current): Three Core Workflows

- Financial (governance)

- Membership (growth)

- Volunteer (engagement)

Phase 2 (Potential): Add Specificity

- Event management workflow

- Technical support workflow

- Committee communication workflow

Phase 3 (Future): Full Customization

- Per-workflow closure approvers

- Custom form builders

- Workflow templates

- Auto-routing rules

Start simple, grow deliberately.

Comparison to Other Organizations

Typical Organization Workflows

Small org: One "Contact Us" form

Medium org: 5-10 specific forms

Large org: 20+ department-specific forms

PMTNM (current): 3 purpose-driven workflows

This is appropriate for:

- Organization size
- Complexity of operations
- Member needs
- Administrative capacity

Key Takeaway

The Three Workflows Are:

Intentionally similar - Same user experience, same engine
Meaningfully different - Serve distinct purposes
Appropriately simple - Not over-engineered
Ready to grow - Easy to add more

The financial checklist isn't random - it's the only workflow where standardized documents exist and governance requires specific handling.

This is good design:

- Simple enough to understand
- Different enough to matter
- Flexible enough to grow

Bottom Line:

You have **one system** with **three configurations**, where **one has a checklist** because it's the **only one dealing with standardized, governed documents**.

Perfect balance of consistency and customization!