



FIELD GUIDE

**BUILDING SIMPLE,
TRUSTWORTHY WORKFLOWS**

TANTA GLOBAL ASSIST

WHAT THIS FIELD GUIDE IS FOR

Workflows exist to reduce confusion and protect accountability, not to impress clients with complexity.

This practice focuses on clarity and repeatability.

Why This Practice Matters in Client Work

Clients lose trust when:

- Tasks disappear
- Ownership is unclear
- Deadlines move without warning

Simple workflows prevent these failures.

Core Principles

- Simple systems outperform complex ones
- Visibility beats memory
- Deadlines protect relationships
- Bottlenecks should be surfaced early

Common Failure Patterns

- Tool hopping
- No clear task ownership
- Missing deadlines due to ambiguity
- Informal “mental tracking”
- Overengineering workflows

Practical Approaches That Actually Work

- One intake method per client
- Clear owner and due date for every task
- Visual task tracking
- Regular workflow reviews
- Explicit handoff points

What This Practice Helps You Do

This practice helps you manage work transparently and avoid surprises that damage trust.



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