# LONGS PEAK WORKFLOW

**Key Notes:**

- If, at any point, on any task—internal, client-facing, training, etc.—you are approaching the estimated time allotted, please reach out to the task owner to ensure the expectations are clear and appropriate.

- When you have multiple tasks that fit into the same hierarchical category, please reach out to the PMs to determine which task is the highest priority.

# PRIORITIZATION HIERARCHY

When determining which tasks to work on, use the following guidelines to prioritize your work:

**#1 Your Client Work**
This should be your top priority as it includes ongoing commitments to clients.

**#2 Client Work for Those At/Over Capacity**
Attend to client work for all team members who are at or over capacity.

Ensure the team can meet client commitments. Reach out directly to team members and ask how you can help (ask closed-ended questions like, "Can I help with any part of that 8 hour XYZ Client task I saw on your task list today?" ).

**#3 Pipedrive, Client Maintenance QCs, & Trainual Updates**
Pipedrive, Client Maintenance QCs, and Trainual should be maintained and updated on a regular basis to uphold service excellence.

This should be done regularly, but if you have down time and no other client work is available, this a good time to make sure these updates are made.

Client Maintenance QCs can be done prior to the due date in the workstream.

**#4 Scheduled Trainings**
Ensure training tasks have been completed (mock emails/calls, readings, etc.) to enhance your learning and development.

Training tasks can always be completed prior to the due date noted.

**#5 Internal Projects**
Discuss internal projects with McKinley before initiating them. This ensures alignment with broader organizational goals and priorities.

**Final Notes:**
- Remember to adapt this hierarchy as circumstances change and to keep communication open with the team to ensure everyone is aligned with these priorities.
- If you have gone through all five steps and still need work to do, reach out to your manager.