

# Activities / Tasks vs. Workflows

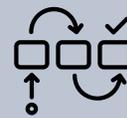
## When to Use What



### Activities / Tasks

- One-off or short-term to-dos
- A simple checklist of action items
- Quick follow-ups or internal reminders
- Items that don't require a step-by-step process

**Ask yourself:**  
*Is this a single action, or does it repeat as part of a larger process?*



### Workflows

- A multi-step process you complete regularly
- A sequence where one step leads into the next
- Structure for onboarding, account openings, reviews, transfers, and similar processes
- Activities to auto-generate based on logic or timing.

**Ask yourself:**  
*Do I want to make sure nothing slips through the cracks during this process?*



### Bonus Tip

- If you repeat a task or workflow regularly, create a template. Templates save time, reduce errors, and improve consistency across the team.
- Take a moment to review your current processes and identify where recurring steps could be automated using workflows.