Profit Optimised
Processes

Supercharge Your Business and Simplify Your Life By Optimising Your Key Business Processes...

...especially if you always find you're too busy!

Tim Dodd ACA

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3d Consulting Services
Making Selling Simple

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Introduction and Overview

"If you can't describe what you're doing as a process, you don't know what you're doing."

W. Edwards Deming

To get things done effectively, we use processes frequently in our everyday life. They're a set of linked tasks or activities that produce a result. Even our morning routine may consist of a whole series of processes, starting with something as simple as taking a shower:

Turn on shower →	Get into shower →	Wash hair with shampoo ↓
Wash feet ←	Wash body ←	Wash face
↓		
Rinse off well →	Get out of shower →	Dry off with towel

- ➤ Turn on shower
- ➤ Get into shower

➢ Wash hair with shampoo
➢ Wash face
➢ Wash body
➢ Wash feet
➢ Rinse off well
➢ Get out of shower
➢ Dry off with towel

And after your shower, you'll have a process for getting dressed. Unless you want to channel your inner Superman, that will involve putting your clothes on in the correct order.

Of course, these are very simple examples from daily life, but the principle is the same for business processes.

A business process shows the relevant people in your business exactly how to do something and how to do it as efficiently as possible. It's a well-defined and structured step-by-step process that ends with the achievement of a business objective such as the delivery of a service or product for your clients.

A well-designed business process will simplify and streamline the way that you and your team work together.

Common areas for processes in small businesses include:

➢ Customer service and support
➢ Product development
➢ Product launches
➢ Recruitment
➢ Marketing
➢ Managing team members
➢ Accounts/cash flow
➢ Social media

Business processes in specific areas of your business combine to create a system. So, your marketing system may be made up of multiple processes, each designed to achieve one objective that contributes to achieving your marketing goals.

For example, one aspect of your content marketing might define the process for writing a blog post. The result, depending on your preferred way of doing things, could look something like this:

1. You start with your idea for a topic
2. You research your topic/keyword(s) and take notes
3. Then you create the structure of your post with headings, subheadings, and key points
4. Next, you write the main content of your blog post, filling in the details surrounding your headings and key points
5. Proofread and edit

6. Add images/screenshots and any other visuals to the body of the post
7. Optimize for SEO – including title, categories, tags, internal links, meta description, snippet preview, images, etc.
8. Schedule the post for publishing

Your content marketing system may also include a separate process for reviewing, accepting, and editing guest posts. You may have another system for promoting and sharing blog posts, and yet another for gathering and recording analytics information on your blog posts. You need whatever is relevant to you and necessary for achieving your business goals.

Inefficient business processes are at the heart of many problems facing small business owners. Documenting and optimizing them is the key to remedying those problems.

How efficiently, or otherwise, you run different parts of your business has an enormous impact on things such as:

- Team overwhelm
- How others perceive your business
- Customer loyalty
- Time management
- Marketing consistency
- Costs
- Your sanity

➢ Your team's levels of frustration, fatigue, and overwhelm

- The way others perceive your business
- The loyalty of your customers to you
- How you spend your time in your business (e.g., putting out fires vs. strategy)
- The consistency of your marketing messages
- The overall cost of doing business
- Your sanity!

When you find ways to simplify, speed up, and streamline processes that you do over and over, you'll have happy team members, delighted customers, lower costs and higher revenue. You'll finally end up with the breathing room needed to focus on moving your business forward.

Your business will have a professional image that helps you gain and maintain a competitive edge. You'll provide world-class customer service experiences, and grow stronger relationships with customers and clients as you spend more quality time with them.

You and your business will be flexible and able to react quickly and efficiently to change or emergencies. You'll reliably and consistently meet deadlines. Profitability, productivity, and quality of work produced will increase exponentially.

Best of all, you'll be able to enjoy the time you spend on your business and have more freedom to spend time outside of your business too. Your business will run smoothly and efficiently without your constant involvement in all its aspects. Your stress levels will plummet as you create a better work-life balance.

By the time you complete this course, you will be able to:

- Identify where you have processes in your business that you perform on a regular basis, so that you can see which ones make sense to focus on

- ➢ Document or draw out a current, frequent business process that you want to improve, so that you'll know exactly what you're doing now and where it impacts your business and your team

- ➢ Analyze the process you mapped out, using best practices and input from team members, to identify where the inefficiencies lie and where there's room for improvement

- ➢ Decide how you will change, outsource, or automate elements of your selected process, so that things run more smoothly and reliably

- ➢ Map out and document the details of your redesigned process, so that you know exactly how it will work and who will be involved in implementing it

- ➢ Test your new process to ensure any team members involved can easily and efficiently carry out each step

- ➢ Communicate and roll out your new process to everyone who is affected by it, so that it becomes part of your regular business operations

Brainstorm Time:

1. Think about the way you currently run your business and then answer the following questions:
   - ➢ Which areas do you feel could benefit most from some focused attention?
   - ➢ If you could dramatically improve the way those specific areas run, what impact would that have?

Step 1: Identify Your High-Impact Business Processes

So, you've considered and set down in writing which areas of your business need to be improved, and the impact of dramatic improvements to those areas. Now it's time to take a closer look at the processes within those areas so you can begin to make those improvements.

It seems to be human nature to overthink and overcomplicate everything. We often create complexity even where simplicity is needed and is more efficient. We say more than we need to because we think it makes things clearer and more valuable. We have a tendency to believe that things should be difficult, so we anticipate things going wrong and want to prepare for that.

This tendency to overcomplicate extends into our business life. The result is that instead of realistic and well-defined business goals (with well-designed processes to achieve them) we have stress, frustration, and inefficiency.

Inefficiency in business commonly occurs in 5 key areas. You may already recognize some of these as areas of your business that are particularly inefficient:

1. Hiring (including contractors or freelancers)
2. Sales
3. Marketing
4. Product Development
5. Customer Service

The key to eliminating inefficiencies in your business is to simplify and streamline by having efficient and straightforward business processes in

place. Whether you document and map out the processes to run your business or not, there are probably many processes involved. To make the improvements needed you first need to identify the most inefficient processes.

Identify Processes

Identify where you have processes in your business that have a big impact on your success.

Business processes usually come under one of three categories:

Operational processes include:	Support processes include:	Management processes include:
Customer support	Hiring/recruitment	Process improvement
Product/service development	Training	Planning
Marketing efforts	Technical support	Budgeting
Sales	Purchasing	Getting funding
	Accounting	Product planning

➢ Operational or Primary
➢ Support
➢ Management

Operational or primary processes are the core business processes that deliver value to customers directly. Examples of these include:

- ➢ Customer support
- ➢ Product or service development
- ➢ Marketing efforts including lead generation and nurturing, and social media marketing, etc.
- ➢ Sales

Support processes support your primary processes. They don't provide direct value to your customers/clients but are important because they help you implement your primary processes and achieve your business objectives. These include:

- ➢ Hiring/recruitment
- ➢ Training
- ➢ Technical support
- ➢ Purchasing
- ➢ Accounting, invoicing, paying affiliates, paying employees/contractors/freelancers

Like support processes, management processes don't provide direct value to your customers or clients. But they're important to your business because they support your primary support processes and help to ensure your business runs efficiently. They help you achieve your business goals. Management processes include:

- ➢ Process improvement
- ➢ Planning
- ➢ Budgeting
- ➢ Getting funding
- ➢ Product planning

The processes that will have the biggest impact on your success are most likely those that fall within the operational/primary category. These are the processes that deliver value directly to customers.

However, success means different things to different people. Success could mean increased income, improved customer satisfaction, achievement of specific business goals, more funding, better training, better working conditions for employees, reduced stress, more time away from your business for you, or any combination of those.

Think about where you have processes in your business. As part of the learning activity in this step, you're going to identify where there are processes in your business that you spend a lot of time on or which have a big impact on your success.

Identify High-Impact Processes for Improvement

Once you have a good sense of what processes you have in your business, you need to identify which are the most inefficient, complicated, or costly. And, even more importantly, which processes will have the highest impact on your business if they can be streamlined.

There are various ways you can do this, starting with asking for feedback and input from team members. You'll get a wealth of information from the people directly involved with the tasks involved.

Also useful is any feedback, complaints, or frequently repeated questions you know you've already received from clients/customers, team members, and contractors or freelancers.

Take time to reflect on the current situation in your business and note problem areas that you already know or can guess are inefficient.

Ask yourself, what is working, and what isn't? For example, are there any visible areas where there seems to be a lack of communication between

team members. Are there areas where employees don't appear to have a clear direction or are spending too much time on trivial tasks. Are employee and company targets and deadlines being met?

Where are resources, time, money, etc. are being used most? Where are you spending the most time in your business, or on which aspects of a task?

Ask your team members, contractors, and freelancers the same questions.

From those areas that you've identified as having the biggest impact on your success, and those needing the most improvement, choose one business process to focus on for the remainder of the course.

In Step 2 we'll move on to how to document/map out this process. You can then move on to analyse the process and identify specific problems.

Keep your list of processes that need improving, so that you can return and address them later.

Brainstorm Time:

1. Complete the worksheet in the workbook. List all the major processes in your business that you feel could benefit from improvement or streamlining. (column 1)

2. For the remaining columns, put a checkmark next to the ones that:

   a. Have the highest impact on the success of your business (eg, on sales, profits, customer satisfaction, employee retention, product quality, etc)

   b. Are currently the most inefficient (eg in time, money, resource use, etc)

   c. Have had the most negative feedback (eg, complaints from customers/employees, questions, etc)

To help you with filling in the worksheet, get input from team members or others who are affected by each process.

3. Review your completed worksheet and select one high-impact process to focus on for the rest of the course. Note why you picked that process to start on.

   You don't necessarily have to select the process that checks off the most boxes. You can also look at which one will be easiest to improve or will have the biggest impact on your business, or even on the stress in your life.

Step 2: Document What You're Doing Now

In this module, you'll work on the high-impact process you selected for improvement in Step 1. You'll precisely document what you're currently doing in that process, so you have a clear picture of all the steps.

Only when you have a clear idea of how you're currently doing things will you be able to move on to identify exactly where the problems lie, and where you'll be able to make improvements.

Ultimately, the person best placed to document a process is the person who usually carries out the tasks. At the very least it should be someone who has good knowledge about the context of the process, its start and end points, and its objective or outcome.

Now, document your business process as it is now:

Do a High-Level Outline

Start out by going through the process as you normally would, step-by-step, creating a simple bullet point list of the main tasks. This is your high-level outline.

A pen and paper, whiteboard, or Word document is perfectly adequate for documenting at this stage.

Document the Details

When you've finished outlining the main steps, work through your process from the beginning once again, documenting what you do at each step in as much detail as possible.

Write down every action and decision, no matter how small or insignificant

it may seem.

Again, you don't need to bother with complicated or fancy tools for this job. Simple pen and paper, a whiteboard or sticky notes. Readily available tools such as a mind map, spreadsheet, Word document, Google Docs, or PowerPoint, will be just fine. Choose the method that is easiest and simplest for you.

Note where activities or tasks in your process are sequential. Look for events that cannot occur until the other is complete.

Note any activities that are parallel. Look for events that can occur at the same time in the process.

Include everything you need to get the job done. For example:

➢ Include links to any resources that will be needed to carry out the tasks. That may include things such as templates, checklists, tools, websites, etc.
➢ Where available or appropriate, include examples of how the finished tasks should look. For example, a completed image for social media created using Canva.
➢ Include example text where text needs to input, e.g., tweet content.
➢ Any login details that the user of the process will need to carry out the tasks, for example Facebook login information.
➢ Include any useful 'front-end' information for tasks, e.g., to give useful background information or reasons why a task is important.
➢ If there is essential information that needs to be carried over between steps, make sure to include that too.
➢ Identify who does what at each step.

Everything You'll Need

- ☐ Links to resources needed

- ☐ Examples of finished tasks

- ☐ Example text

- ☐ Login details

- ☐ Front-End information

- ☐ Information that needs to be carried over between steps

- ☐ Who does what

Note where screenshots, screencasts or videos of tasks will be helpful for clarity instead of written instructions.

If appropriate, you could even have a colleague or employee take a video while you or a team member completes each task and provides a running commentary of the process. You may have you and a colleague or employee discussing the tasks as they're being carried out.

A very simple initial documented process for a freelance writer hired to write weekly blog posts could look something like this:

Title of Process:

Weekly blog posts for [client name]

Description:

1 x 1000-1500 word blog post per week to be written for [client name and client blog].

[Links to example blog posts]

[Link to any blog post templates or checklists]

Process:

Select Topics

- During the third week of each month, the writer and client brainstorm the following month's blog post topics on the client's site Trello board. [login link]
- From that list, the client selects four post topics for the writer for the following month.
- On a new Trello board for that month, the client lists those posts and the order they should appear.

Write Blog Posts

- The writer completes one 1000-1500-word blog post for each week to be ready for client approval no later than Tuesday of each week. Write posts either directly within the Ghost.org publishing editor [login link], or copy and paste your draft post into the platform editor.
- The writer formats the post with keyword and topic relevant headings and subheadings. (Dropbox link to document with client keywords)

- The writer adds any other formatting including in-post images. Images selected from the client folder on DepositPhotos. (login link and login details)

Client Approval

- At least three working days before the scheduled weekly publication day (Friday), the writer notifies the client by email that the post is in drafts on the Ghost platform. (client email address)
- The client approves the post or notifies the writer by email of any edits required. Edits can be requested one time only.
- The writer makes any requested edits. By Thursday of each week, the writer notifies the client by email that edits are complete and that week's edited post is ready on the Ghost platform. The client is then responsible for scheduling & publishing the post on their blog.

Payment

- The writer sends PayPal invoice to the client after approval of each post. (client email address for invoices)

Brainstorm Time:

> ➢ Using the examples given in this module as a guide, document the high-impact process you selected in Step 1, so you have a clear picture of all the steps.

Use the Existing Process Analysis section of the Redesigned Process Spreadsheet, or whatever tools are simplest and easiest for you, e.g., pen and paper, whiteboard, mind map, spreadsheet, Word document, Google Docs, or PowerPoint.

Step 3: Identify Where You Can Do Better

In Step 2, you documented all the tasks that currently make up the existing process you've chosen to improve. In this module, Step 3, you'll analyze that process to identify problem areas. You'll decide how you will change, outsource, or automate elements of it so that things run more smoothly and reliably.

When your analysis in this module is complete, you will be able to move on to Step 4 to redesign your business process. That redesign will include all the improvements you identify here in this module.

Define Your Process's Scope

Start by defining the scope or boundaries of the potential changes to your process, so that everyone involved knows what constraints you must work under when identifying areas for improvement.

Documenting now what will not or cannot be done to improve your process avoids future problems such as the addition of resources that are not budgeted for, or the unplanned expansion of the extent of the improvements you want to make. And so avoids the end result of a process that still doesn't match what you need or can do right now.

The types of things you need to consider are:

- ➢ What are your overall budget limitations for improving this process?
- ➢ Are you willing or able to purchase new technology or software?
- ➢ Are you willing to increase your training budget?
- ➢ What's the timescale or time limit for getting this process completed?

> ➢ Can you hire new employees?
> ➢ Are you willing to outsource any aspect of your process? Or change people's jobs or roles?
> ➢ Are you prepared to make immediate changes to other processes? Changes you make to this process may result in it being necessary to make changes to associated processes – consider whether you're prepared to make changes to your other processes now, if not, then specify that in your scope documentation.

Consider all of these questions before you start identifying the improvements you want to make, since they will limit what you decide to do in your redesigned process.

For example, if you don't have the budget to hire a contractor to take over your accounting, then you'll need to look at other ways to improve that process that you can do with your current resources. Or if you aren't willing to increase your training budget, then you'll need to implement changes that don't require much, or any, additional employee training.

As you're working through your process looking for problem areas, it's easier to say no to possible ways to improve if you've already clearly defined the scope of your process improvements.

Common Process Problems

The main problem areas you should look out for are:

> ➢ The process is not clear enough/it's confusing
> ➢ It's too complicated, there are too many steps, and there are irrelevant steps
> ➢ It's too time-consuming
> ➢ It's too heavy on resources

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                    ┌──────────┐
                    │ Unclear  │
                    └──────────┘
                         │
┌──────────┐    ┌──────────────┐    ┌─────────────┐
│ Too heavy │───│ Main problem │───│     Too     │
│    on     │   │ areas to look│   │ complicated │
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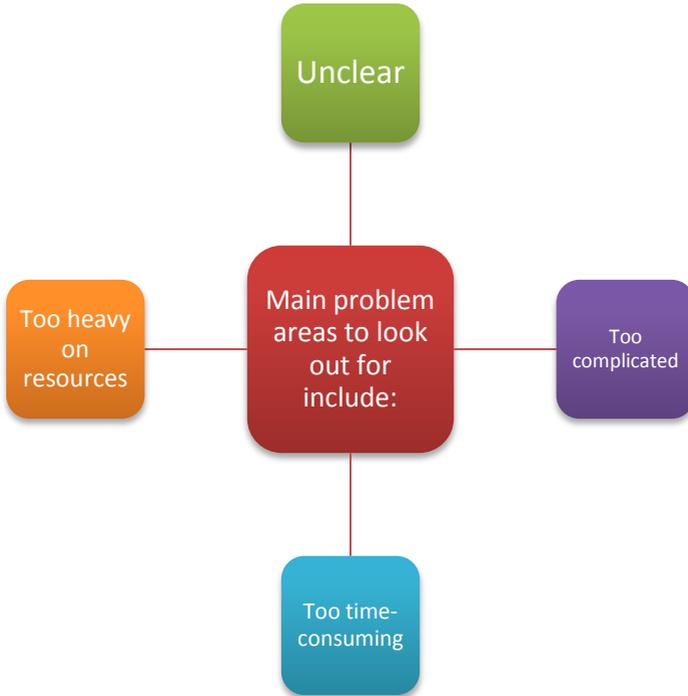
Analyse your Process

When you are working through the process, ask yourself questions. Or if you're working through this with an employee ask them questions. Make a note of their answers next to each step in the documentation you created in Step 2.

Firstly, ask yourself if there any steps missing. If so, where, and what? Your work in Step 2 has most likely already uncovered some obvious gaps. Identifying missing steps is a key part of making sure your process will be as efficient and effective as possible so be sure to spend enough time on this part.

Let's look at a very simple example:

1. Write a blog post

2. Schedule it

3. Publish it

4. Promote it
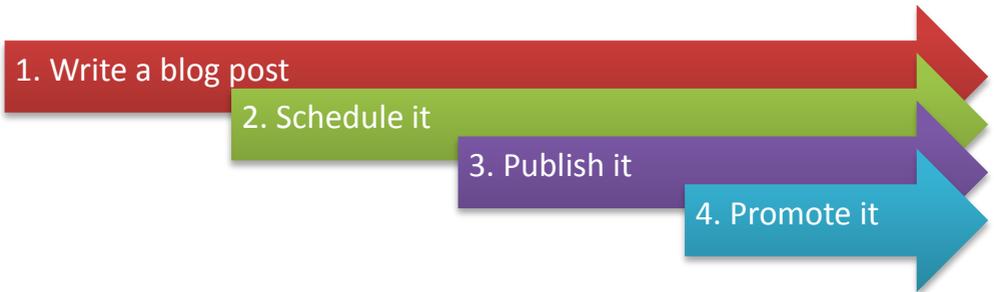
You might think that is a good-enough process. But if someone works through those process steps exactly as you have written them, at the very least they'll find steps missing. Where are the steps for uploading, formatting, proofreading and editing the blog post? All sorts of questions will crop up about what to do next (and how). There just isn't enough detail and information in that process to enable someone to reach the process outcome.

Let's look at another example:

In the hospitality industry, preparing a dining room for hotel guests will include a step for setting the tables. An action called "Set the table," doesn't give enough information to get the job done efficiently. There should also be detailed steps for the correct way to set the table, what items to use, and the order and position to place them.

Getting this process right is not just about making the job easier for your employee, or about making a favorable impression with the customer. Of course, both of these are essential, but it's also about things such as keeping costs down. By using only the number of tableware pieces necessary, this will reduce dishwashing and so save time and money.

If you're wondering how much detail is too much, Marriot Hotels famously has a 66-step manual just for the process of preparing a hotel room for a new guest in 30 minutes!

Remember that your process will ultimately need to be detailed enough for someone to work alone or unsupervised, and to follow it step-by-step to achieve its goal.

Here are some more questions you should ask and answer as you work through your existing process:

- ➢ Are all the steps in the correct or best order to achieve the outcome? For example, could it be completed faster or more easily if you swapped the order of any of the steps?
- ➢ Is a particular step necessary? Can it be removed? What will happen if we remove this step?
- ➢ Where and why does this process slow down or stall?
- ➢ When and why do errors occur?
- ➢ How many employee hours does it take from start to finish?
- ➢ How many employee hours are spent doing work that isn't essential? Could that be reduced?
- ➢ How efficient is it regarding material resources used? e.g., packaging, paper, cleaning products, ingredients, etc. – whatever is relevant to your business.
- ➢ Can I automate the process or parts of the process?
- ➢ Can I outsource the process or parts of the process?

Coordinate with relevant team members, and employees to help answer these questions.

Consider When to Automate

When you have located any problems in your process and removed any non-essential steps, consider which remaining steps could be automated.

The benefits of automation for your business include increased productivity, more efficient use of time and materials, better product or service quality, and reduced workload/work hours for you and employees.

However, before you decide whether to automate parts of your process, consider whether automation may complicate your business rather than simplify it. For example, new technology may increase the need for additional employee training to show them how to use it.

Choose software or tools that are easy to use. Some of your team members might not be technically minded, and intuitive and easy to use automation tools minimize the need for time-consuming or expensive training.

Automation is great when it's working efficiently, but have a backup plan in place if the technology fails!

Do not just automate and forget. Monitor your results to check the effectiveness of the automation in achieving its goal, and how well team members are using the tools.

Automation Tools

There are many tools available for automating a wide range of tasks. For example, Zapier is a web automation app that automates your workflow. It can automate tasks that involve Twitter, Hubspot, MailChimp, Wufoo, etc.

Some other tools for automation include:

➢ Finances/accounting: FreshBooks
➢ Email marketing automation: Aweber, MailChimp, ConstantContact
➢ Social media automation: Hootsuite, TweetDeck
➢ Analytics: Google Analytics, Kissmetrics
➢ Marketing automation: InfusionSoft
➢ Task management/collaboration: Evernote, Asana

Consider When to Outsource

Consider whether you should outsource all or part of your existing process.

Outsourcing aspects of your business will free up more of your time for business growth and give you more time to focus on core business activities.

You can maximize productivity and increase efficiency without the expense of a full-time employee, and the readily available technologies for communication and collaboration means you can locate and work with skilled professionals from anywhere.

Examples of commonly outsourced task types:

Admin	Customer support	Accounting
Social media-related tasks	Blogging	SEO
	IT	

To identify a process suitable for outsourcing, think about the tasks where your time is least valuable. Conversely, think about the valuable tasks you spend time on. Which tasks are you currently doing that can easily be delegated, freeing you up to work on areas that you either enjoy more or

are a more valuable use of your time? What could someone else do just well as you, or even better than you?

Consider the potential drawbacks as well as the benefits of outsourcing for streamlining your business. Primarily, consider if outsourcing will add more work for you. You'll need to make sure contractors or freelancers do what you need them to. You may spend extra time answering questions, explaining things, and overseeing work. Of course, having excellent business processes in place avoids or at least reduces potential problems. Your outsourced employees will know what they need to do to achieve the exact results you want.

You can find professionals for your outsourcing needs from your business network, on LinkedIn, on sites such as Freelancer.com and Odesk.com, and in professional groups or associations, etc.

Brainstorm Time:

1. Decide how you will change elements of your process. To help you decide which elements need changing, use the list of questions provided in the module and work through your process asking and answering relevant questions to identify where problems occur. Complete the worksheet provided.
2. Work through your process and identify and note any parts (or the whole) where automation will help things run more smoothly and reliably.
3. Work through your process and identify and note any parts (or the whole) you can outsource.

Step 4: Design Your New, Profit Optimised Process

You've now picked a current high-impact process to improve and documented it to see how you are doing things now. You've analyzed the process to identify problem areas, and where to make improvements. Now it's time to map out the details of your revamped process so that you and your team know exactly how it will work and who will be involved in implementing it.

Start with the Basics

Give your process a title and description

Note down the goal

Identify start and end points

Note down responsible team member names
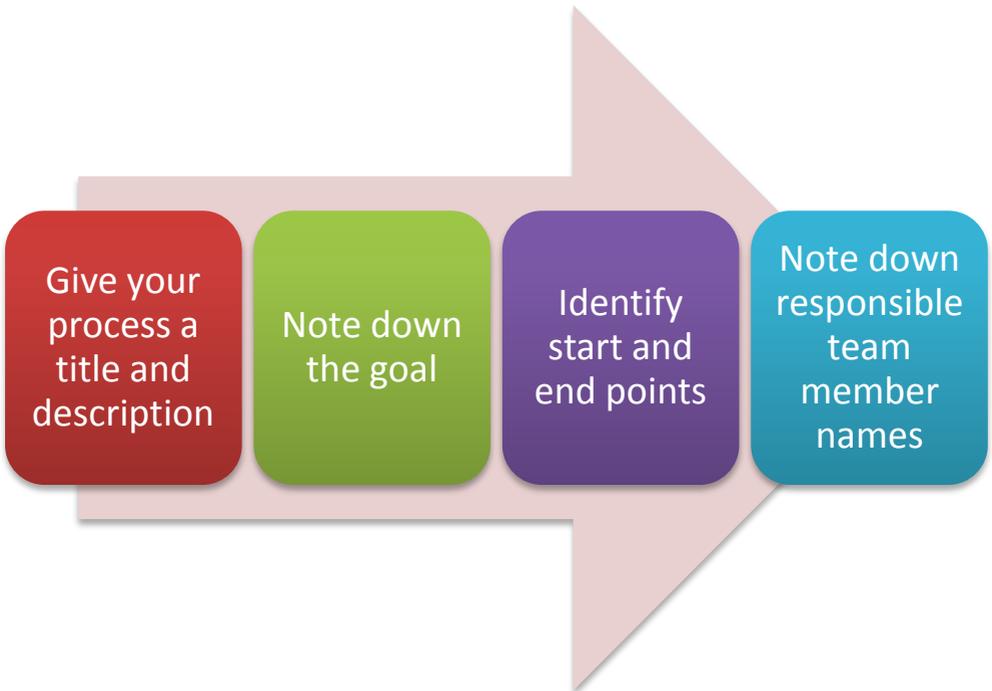
a) As this is to be a detailed and complete process document, start by giving your process a title and a description.

b) Note down the desired outcome of your process. What is its goal or output?

c) Identify its start and end points. Which activity or task is the first step in the process, and which is the last?

d) Note the names of team members who will be responsible for completing the activities/tasks.

Document the Details

Map out your redesigned process using the same mapping tasks outlined in Step 2 when you first documented your process (see below for a recap of those tasks). Make sure to include all the improvements you identified during your Step 3 analysis of the process.

Work through the process from the beginning and document each step in as much detail as possible. Write down every action and decision, right down to the smallest. There should be no room for doubt on the part of the person carrying out the actions in the process.

Document any activities or tasks in your process that must be sequential. And document any activities or tasks that can occur at the same time in the process.

Remember that your process design must include every resource and piece of information that you need to make it work efficiently. You will have identified those necessary for your process during your work in Step 2 and Step 3. Refer to that work when mapping out your redesigned process.

Here's a quick recap of some the types of things you'll have identified you need to include:

➢ Resources such as templates, checklists, tools, and websites

➢ Examples of completed tasks

➢ Login details
➢ Useful background information for tasks
➢ The person responsible for tasks
➢ Details of any visuals such as screenshots, screencasts and videos

Tips and Best Practices for Documenting Powerful and Efficient Processes

Consider the Length of Your Process

Keep your processes as concise as possible, while still including all the necessary steps and information required to carry out the tasks.

Shorter processes are easier to manage and carry out. So, if it has more than ten steps, consider if it's appropriate to break down into two (or more) processes.

Longer processes can appear intimidating. Employees or team members are more likely to rush through the steps, so it's easy for them to miss important points. Longer processes are also difficult to write clearly. By necessity, sometimes a lot of steps may be required to achieve the necessary outcome. In these cases, one option would be to consider if it's useful and appropriate for your business to have a short version of the process. The shorter version could have the general steps outlined (e.g., for people who are already relatively familiar with the process), and a longer more detailed version for anyone new to the process.

Provide Context

Defining your process's position within the wider context of your business, and giving your team members or employees the bigger picture about tasks has various benefits. For example:

➢ It's motivating for the person doing the work as they have a better idea of the value of the work they're doing. It's good to see how the task impacts positively on the business in general, and how it

impacts on those who will follow-on and work through the next process in the system or parallel processes.

➢ It also helps you to identify in future if or when the process is no longer needed.

Use Visuals

Where appropriate, use visuals to better define the steps. Visuals can expand on written instructions, and demonstrate how something looks when completed successfully. Screenshots with annotations, screencasts, images, and videos, are useful visual elements.

For example, you could demonstrate how to do something such as entering customer data by creating a screencast with a tool like CamStudio.

Training videos that show "this is how I/we do it," i.e., exactly how to do something, can be very useful for demonstrating any practical tasks. They can make complicated instructions and tasks easy to understand. Your team members can see every step being carried out and they can see the skills and tools to use. Link to your training videos from your process document.

Make Your Process Teachable

Design your process so that it's simple enough to be understood and taught by anyone. There should be no room for assumptions and guesses, or constant questions and confusion.

More Tips for Writing Your Process

➢ Use simple, informal language and avoid jargon. Make everything very easy to understand. Each step or task should work with very limited or no supervision. It should need little input from anyone not doing the work.

➢ Front-load any useful information that people need to know before they start the tasks.

➢ Provide clear timelines and quality expectations where it's appropriate.

➢ Write your steps so they tell people what they *should* do, and not what they *should not* do.

➢ Where possible, anticipate any problems that may occur and include notes or solutions.

➢ Automate where it's possible or appropriate.

➢ Outsource where it's possible or appropriate.

➢ Team members, employees, and freelancers, etc. will change. So, create your processes to be as 'generic' as possible.

Use simple, informal language and avoid jargon

Front-load any useful information before the task starts

Provide clear timelines and expectations of quality

Tell people what they should do, not what they should NOT do

Anticipate problems and provide solutions

Automate where it's possible

Outsource where it's possible

Create processes to be generic as possible

Tools for Mapping Processes

There are many tools available for creating flowcharts, mind maps, and other diagram types suitable for mapping your processes, here are some suggestions:

ConceptDraw

Edraw

LucidChart

Visio

And of course, there's standard software like Google Docs, Word, PowerPoint, and various spreadsheet tools such as Excel.

An online search for process map templates will bring up useful templates you can download or use for ideas.

Similarly, an online search for best practices for layout, flow, notation, etc. of your mapped process will bring up useful ideas.

Get Ideas and Input from Internal and External Sources.

For help with the redesign of your process, coordinate with relevant team members for their suggestions and feedback. Contractors or freelancers may have experience of similar processes in other small businesses and may have useful ideas to add.

Every small business is different, but some processes are similar or generic across small businesses. For example, developing new products, order fulfillment, customer service support. You can adapt these processes to your own needs and uses. An online search will bring up examples of generic processes you can use for ideas, instead of reinventing the wheel. You may also have colleagues who run small businesses from whom you could get ideas for streamlining generic business processes.

Brainstorm Time:

1. Map out your redesigned process in detail using the Redesigned Process spreadsheet. Include all the improvements you identified during your analysis in Step 3. Include details of any visual elements required, such as screencasts, screenshots, images, and training videos.
2. Create any visuals required.
3. Create any training videos required.

Step 5: Show Time! Test, Implement & Communicate

Now that you have designed your new process with the improvements it needed, it's time to test it out to ensure team members involved can easily and efficiently carry out each step and reach the process goal.

And once you've satisfactorily tested your new process, it's time to communicate and roll it out to everyone who is affected by it. It will become part of your regular business operations.

Test Your Process

When the time comes for your team to test your new process, anticipate, and be ready to resolve, potential resistance to the changes you've made. Make sure your team knows the exact reason for the changes and make them aware of the benefits they will bring.

Pilot Your Process

Before you implement your new process widely, it's a good idea to pilot it first. The pilot gives you the opportunity to gather more feedback, and discover and address any previously unseen problems.

Continue to ask questions of the process (see Step 3 if you need a reminder of the types of questions you need to ask), and specifically request feedback from those carrying out the pilot. Note any questions they ask and any steps or instructions where they need clarification.

Based on the feedback you receive during the pilot, edit and improve your new process, and retest.

Involve Your Team

When they're involved and have input into the testing and fine-tuning of your new process, your team members will get a valuable sense of ownership. This involvement makes the implementation easier.

There are various ways you can involve your team in the test phase. Let's look at some of those now.

Perhaps you designed and created the process, but are not the person who will carry it out day-to-day. You need to have the person who will be responsible complete the process on their own, while you watch and take notes. As they work through the steps, make a note of any questions they ask, or problems they identify. Also, note any inefficiencies or problems you identify yourself as you see the process in action.

Have the person who'll be responsible for carrying out the process demonstrate it to another employee, or have them teach another employee how to work through the tasks. These are both good ways of gauging their level of understanding of the new way of doing things.

If it's appropriate, test your new process on someone who doesn't normally carry out the role. The tester could be a new team member or someone on your team who normally has a different role. As before, note any questions they ask and problems that occur.

Depending on the nature of your business, an effective way to check that each step works efficiently and logically is to create artificial but realistic scenarios. For example, if you run a hotel or guest house, have a team member play the role of guest to check the process of booking and paying for a room. In other scenarios, you could have team members play the role of a client or customer and book services, purchase products, make a complaint, and so on. Consider if this a method you could apply in your business.

Measure Your Success

A key part of this testing phase is deciding how you will track and assess the success of your new process.

The metrics that matter to you will, of course, be dependent on your specific process goal/outcome and the problems or inefficiencies it has been designed to address.

For example, you'll want to know if:

➢ The new process produces the intended outcome or goal
➢ Whether it produces the intended outcome or goal in an appropriate amount of time
➢ Your customers or clients are happy with the outcome
➢ Whether it's cost-effective

And you might want to measure things such as:

Social Media Metrics	Social followers	Facebook page stats	Conversions	Referrals
Sales Metrics	Sales growth	Profit margins		
Marketing Metrics	SEO traffic	Keyword ranking	Web traffic sources	Sales revenue from campaigns
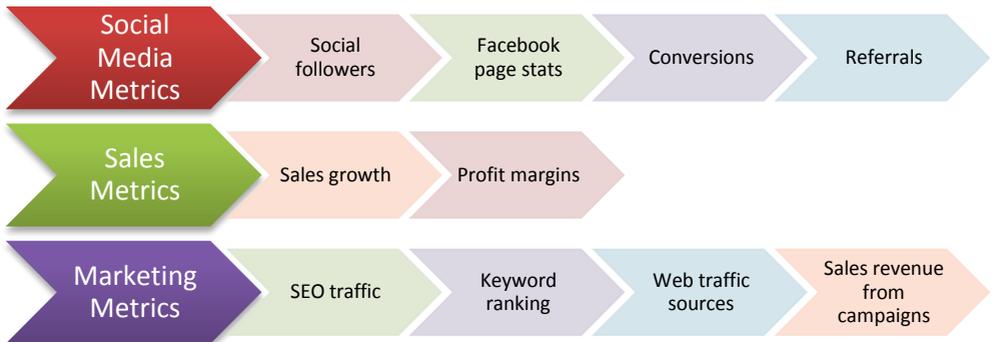
➢ Social media metrics, e.g., social followers versus targets, Facebook Page stats, conversions, referrals
➢ Sales metrics, e.g., sales growth, profit margins

> ➢ Marketing metrics, e.g., SEO traffic, SEO keyword ranking, web traffic sources, sales revenue from different marketing campaigns or sources

The metrics you select for tracking your new process will entirely depend on its nature and your goals. So, select from the ideas here or pick something more relevant for you.

Implement Your New Process

You and your team have put a lot of work into creating your new business process, and now it's ready to become a significant and positive part of your regular business operations.

When you're ready to go ahead, you need to let everyone concerned know about the upcoming implementation. You must carry out employee training if needed to make sure everyone understands the changes and can carry them out properly.

To help implementation go as smoothly as possible, be a visible champion of the new way of doing things. Show enthusiastic support and commitment to it, and be available to answer any questions that may come up.

New procedures take time to implement and become fully established. Remember to track whether employees seem to be reverting to old methods. If so, remind them of the importance and reasons for the changes. i.e., because of the business problems the old process was causing, and reiterate how the new process will benefit them personally. Ask them why they seem to be resistant to the changes, and whether there are any previously unidentified issues or problems. Provide additional training where necessary.

If you're confident your process is efficient and comprehensive, and your employees are still not reaching its outcome easily, then the problem may

be with training or compliance. Provide additional training, and also consider whether you need a better, more effective way of teaching the new way of doing things. Explaining why the changes are important and beneficial is helpful for encouraging compliance.

In the weeks and even months after implementation, continue to track and assess how well the process is working, and whether it's producing the expected results. Be sure to correct problems as soon as they occur.

Once your process is stable and you know it's working, you can again consider automating some tasks to make it even more efficient. Or consider outsourcing. You may also decide to commit to purchasing new equipment or technology to streamline things even further.

Brainstorm Time:

1. Decide how you will test your process. Will you pilot it? What other measures will you carry out to ensure it's effective? Using the worksheet provided, list your test methods.
2. If appropriate, schedule the piloting of your new process.
3. Decide on your metrics for measuring the success of your new process. Complete the worksheet provided.

Conclusion and Next Steps

You've reached the final module. Now it's time to review and finalize your redesigned business process and determine your next steps and deadlines. Be ready to implement as soon as you finish the course.

During this course, you've learned:

> ➢ How to identify the processes in your business which are the most inefficient, complicated, or costly, that you perform on a regular basis. Identifying these enables you to see which ones make sense to focus on for improvement. After choosing one of these current, frequent business processes to improve you then focused on that for the remainder of the course.
>
> ➢ Techniques for documenting that process so that you know exactly what you're doing now and where it impacts your business and your team.
>
> ➢ How to analyze the process you documented. By using best practices and input from team members, you identified where the inefficiencies lie and where you can make improvements.
>
> ➢ How you can change, outsource, or automate elements of your selected process, so that things run more smoothly and reliably.
>
> ➢ How to map out and document the details of your redesigned process, so that you know exactly how it will work and who will be involved in implementing it.
>
> ➢ How to test your new process to ensure any team members involved can easily and efficiently carry out each step.
>
> ➢ Finally, you learned how to communicate and roll out your new process to everyone who is affected by it, so that it becomes part of your regular business operations.

You're now ready to start streamlining your business with your redesigned

business process. A business process that will improve profitability and productivity, and help you have a better work-life balance.

Once you have implemented your new business process, you need to remember to monitor it closely. Doing so will enable you to identify further areas for improvement.

Brainstorm Time:

1. Make a list of the tasks you still need to complete to finalize your new business process. In particular, you'll need to confirm that relevant team members can easily and efficiently carry out each step to reach the process objective. Set deadlines for each task.
2. Set an implementation target date for your first, revised process.
3. Decide on which process you'll work on next. Use the list of priority processes to be improved that you created in Step 1 to help you decide.

Before you go, here are a few more books & courses that you may find useful if you run a professional services business…
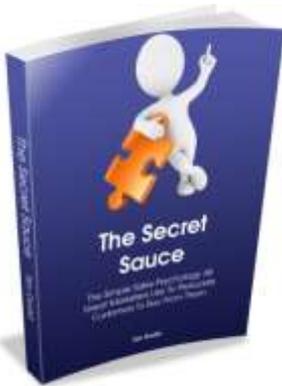
*Understand How Customers
Arrive At Their Decision To Buy*

The Secret Sauce

The Simple Sales Psychology All
Great Marketers Use To Persuade
Customers To Buy From Them
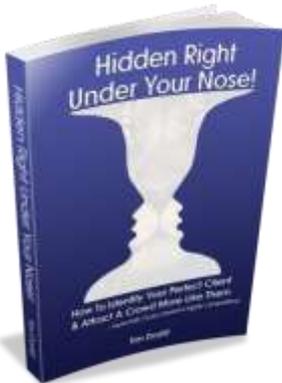
*Clients Are Everywhere, Provided You
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& Attract A Crowd More Like Them
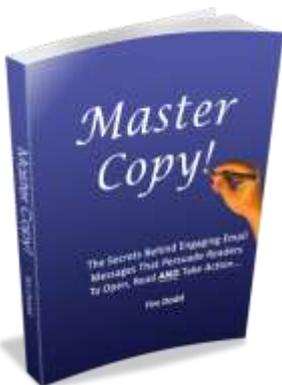
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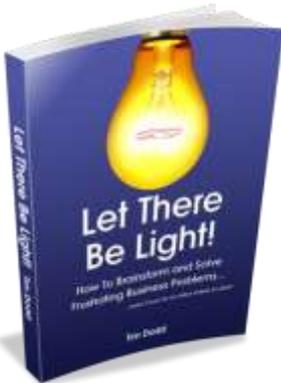
***The Key To Business Success Is The Ability
To Solve The Problems You'll Encounter***

Let There Be Light!

How To Brainstorm and Solve
Frustrating Business Problems
Even If You've No Idea Where To Start.
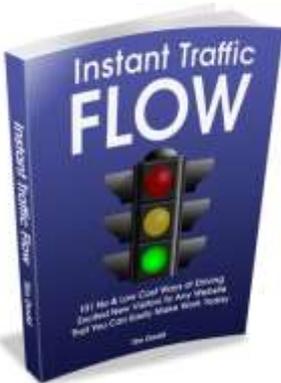
***Drive Web Traffic At Will and
Scale Up Your Business Fast***

Instant Traffic Flow

101 No & Low Cost Ways of Driving
Excited New Visitors To Any Website
That You Can Easily Make Work Today
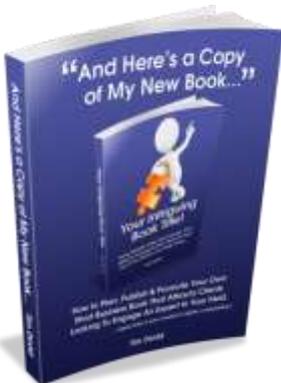
***Authors Have a Level of Credibility that
Sets Them Apart from Their Competition***

"And Here's a Copy
of My New Book…"

How to Plan, Publish & Promote **Your Own**
Short Business Book That Attracts Clients
Looking To Engage An Expert In Your Field

These & several other books are free to download from
www.3dconsultingservices.com/resources/

About the Author:

Do you ever wish you could find an easier way to attract new clients?

If you're thinking "Yes, I do!" you're not alone. Many professional service providers feel like that because they are experts in providing the service that they're qualified to provide, rather than in the selling of it.

As our paths may not have crossed before, let me introduce myself. I'm Tim Dodd, a former chartered accountant and a specialist workflow process consultant. Basically, what I do is advise clients on suitable processes to use when they want to attract a consistent flow of new business on auto-pilot!

If you're a business owner or professional service provider, who likes the sound of having leads generated, prospects followed-up with and client relationships built automatically so that you and your team can spend more chargeable time working with key, fee-paying clients, then I believe I can help you.

Or maybe you like the idea of automating these vital business processes but aren't yet convinced that it will work in your specific market.

No matter which, if business automation is of interest to you and you feel that a no strings chat might be helpful, then please head over to

www.3dconsultingservices.com/call

and book a time that's convenient time for you when I can tell you more.

There's no charge, and I guarantee you'll be both amazed and delighted by the tools we'll talk about and the boost in productivity and profitability that your business could easily enjoy.

I look forward to speaking with you soon.

Tim

At some point in their life, everybody will have been accosted in a shop by an eager young sales assistant desperately trying to sell them something they really didn't want! No doubt, you'll also have received loads of direct mail through your letter box from marketing companies, trying to persuade you to buy some new, miracle product or other from them. And I'm almost certain you'll have come across those long, rambling, seemingly never-ending web sales pages that have you scrolling down forever & ever.

If you're a professional services provider, like me, you'll absolutely hate the thought of being categorised alongside any of the above. Yet, finding and winning new business is becoming more and more competitive. And, no matter how much we dislike it, we all have to sell something in order to survive.

When I first started my consulting business I used to feel exactly the same way I imagine you're probably feeling right now; overwhelmed by everything you know should really have been done by yesterday!

However, everything changed for the better, when I engaged a truly inspiring business coach with an unthreatening, future focussed, education-based coaching style that enabled me to discover several hugely effective strategies of my own. Strategies that have been proven to work for virtually any type of professional service provider with an online presence.

The most important of these are my client finding strategies. Clients are all around us. The secret is to have a process that quickly enables you to identify who will be the best clients for you and how you can discover where they'll all choose to congregate together!

If you don't already have an effective client getting process that's working well for you and you want to learn how to identify who your perfect client is and where you can find more people who meet your ideal client's profile then you'll quickly realise that this book was written specifically with you in mind!

Just a quick word of advice: Make sure your business can handle a rush of new clients, always provide outstanding service to every client who engages you and understand that, above all, the secret of success is to have fun!

3d Consulting Services

UK £5.99 USA $8.99