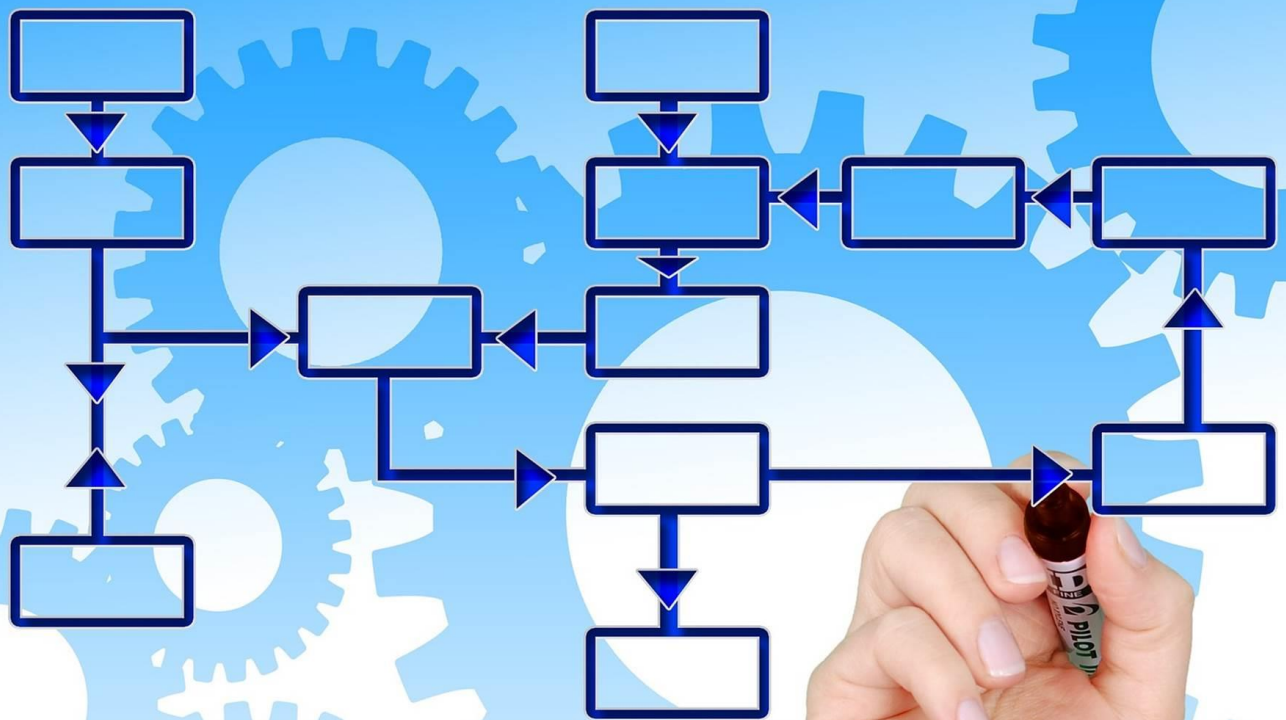


## 3d CONSULTING NUGGETS

# Five Key Steps For Implementing Simpler, Safer & More Productive Business Processes Faster



## 3d Consulting Services

## Magnify Your Mission : Multiply Your Reach

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# **Five Key Steps For Implementing Simpler, Safer & More Productive Business Processes Faster**

**Tim Dodd**



**3d Consulting Services**  
*Magnify Your Mission : Multiply Your Reach*

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## **Introduction**

Every business, no matter how large or small, has regular business processes to manage. These are everyday tasks like submitting invoices, writing, and publishing blog posts and answering customer queries. Even a freelancer or solo entrepreneur has to have established workflows to get everything done efficiently. Sometimes these processes need to be improved and tightened up.

You may not realize it, but you may be wasting resources. Money, time, and labor might be spilling out here and there. You may find yourself bogged down in the mundane daily tasks that keep you from getting more important work done. The result is that you're earning less than you should be. Inefficient processes can also hurt your customer service, company culture, and stress level.

Businesses regularly revisit these processes and look for ways of improving them for better efficiency. They take one task and use a system for analyzing the process, identifying problems, and implementing solutions. Improvements happen one task at a time rather than in one massive overhaul of the company operations.

Here is an outline of the five-step process you should be using on a regular basis to streamline your own business.

### **1. Identify a Business Process to Simplify**

The first step is to identify the areas where your business is struggling. You might already have a good idea of some task that needs streamlining. Business processes can involve many areas such as:

- Customer service and support
- Product development
- Sales processes
- Recruiting employees
- Online or offline marketing
- Management of staff
- Accounting and managing cash flow

There may be a particular task that seems to put a drain on your resources and doesn't deliver much in the way of results. If you think about it now, you may

already be able to identify an inefficient and wasteful task. If nothing springs to mind, here are a few things to look for:

- Time-consuming tasks. Monitor your workday to discover the tasks that are putting the greatest strain on your time.
- Highest impact or most important tasks. Which task makes the biggest difference in your business? Streamlining this task will likely have a major impact on everything else you do.
- The most expensive tasks. Look at tasks where you invest a great deal of money but don't see the ROI you'd like to.

When considering tasks to streamline, you should also consider that some tasks simply can't be cut. For example, you may find that you need all of the time and resources it takes to write your blog. You can't outsource to someone else with a different voice and different ideas. In this case, you might decide that you can do nothing, and so find other ways to make the most of your efforts.

## **2. Map Out the Process**

Once you've identified a process to be simplified, map it out. Create a visual workflow from start to finish so that you can see the task in big-picture form at a glance. A flowchart is a good way to do this, but a bullet point list of tasks will do as well. We don't want to overcomplicate our simplification process!

Include in detail every single step along the way to getting this task completed, and note what resources you use at each step, including human resources. Document every detail, action, and decision.

It's important for each step to be detailed and specific because this is where you'll find something to trim.

*For example, if you've chosen invoice submissions, your flow might look something like this:*

- Opening last month's invoice (Word version)
- Saving as a new file
- Changing date
- Erasing last month's details

- Adding this month's details
- Calculating total
- Double-checking name, address, and other details
- Converting to PDF
- Sending to client

At this stage, it's good also to identify the goal of the task. Sometimes keeping the goal in mind helps you see steps that you can cut. There might be a step that doesn't help in attaining the goal.

Enlist your employees to help you outline your tasks, especially if they're in charge of carrying it out. If they're performing the task on a day-to-day basis, they'll be better able than you at outlining the specific steps in detail.

### **3. Analyze Your Workflow**

Now, look at your detailed steps and find areas that can be removed, tightened up or improved. If something doesn't immediately jump out at you, look for:

**Bottlenecks.** Some area of the workflow where work piles up and so stopping the efficient flow of other work. An example of this would be an inbox that piles up so that you spend too much time dealing with emails to answer new ones.

**Communication Relays.** You might lose time with relaying information. For example, you have a customer service call center where the person answering the phone has to enter the issue into a database, contact the appropriate specialist, send the information to the specialist, receive the answer from the specialist, and so on. Avoid these delays by creating a system where specialists get automated alerts when issues are needing their attention.

**Confusion.** Look for any part of the process that's not clear, ill-defined, or confusing. The problem could be a part of the task where you or your employees are getting caught up due to lack of understanding.

**Lack of Visibility.** There may be a task where Management or others who might have an interest in the task can't see what's going on. They can't view the processes' status or progress. They may not have a clear idea of how they're performing overall.

**Integration Issues.** Sometimes, the technology behind a process doesn't integrate well with existing systems. The lack of integration can cause communication problems and malfunctions. For example, you may have two computer systems that can't talk to each other. The resultant problems mean that your employees have to take up the slack.

**High Costs.** Look at tasks or steps where the cost is high. Look at the cost and compare it with the results you see from the task.

**Delays.** Look for areas in your business operations where there are typically delays. If you have delays, there's a good chance that things need changing. The important thing is to ask why there is a delay happening.

**Missing Steps.** Although we're simplifying, you might find where crucial steps are missing. When steps are missing, you're expecting your staff to make snap decisions they may not be prepared to make, and this can lead to inefficiency.

**Disordered Steps.** Once you lay out the steps, you might find that they're not in order, or that a different sequence may be more logical and efficient.

Again, enlist your employees to help you identify problems, especially if they're involved in the task.

## **4. Redesign the Process for Better Efficiency**

Starting again with the goal of the task, redesign it so that it removes the problems you identified in the last step. Focus on:

- Removing duplicate tasks
- Widening bottlenecks
- Saving on costs
- Cutting down on time
- Delegating tasks
- Automating tasks or parts of tasks

Consider how the change you're making will affect other parts of the task. For example, widening a bottleneck might cause another bottleneck to occur. Or it might add more work down the line. If you make any changes, put a plan in place for dealing with issues created in other tasks.



Also, keep in mind that any of the above changes could inadvertently result in worse efficiency or more problems. For example, if you choose to outsource, you'll now need a process in place for outsourcing. The same goes with automation. Automation can lead to another inefficient process showing up which could make the overall task more complicated.

Once your team has agreed on a change, you need to create a new diagram or flowchart of the task incorporating the change. Write each step and all details in as concise a way as possible. Make sure the wording is clear and ask your staff or someone else to see if everything is easy to understand. Clarify what resources you need at each step and design them in such a way that the oversight of a supervisor isn't necessary.

The new process needs to be one that is easy for anyone to teach. You'll need your employees to learn the new process, and it also helps if they can train other employees. The point is to simplify, so make the new process simple as well.

## **5. Test Thoroughly and Implement**

Start with a trial period. You've made some changes, and you're going to try them out. Things may be shaky for a while. You now have new processes to deal with, so there will be kinks you didn't anticipate, but you should see things coming together.

If you've implemented a change and it doesn't seem to be working out, you might want to go back to the fourth step and repeat. Although you tried to anticipate any problems the change might create, possibly it's created issues that make the task less efficient than it was before. If this is the case, you should either rethink your change or go back to the third step and try to solve the problem again.

Make sure that you communicate the changes clearly and thoroughly to everyone involved. Also, ask them to communicate with you if there are any problems with the new process and seek their feedback.

When there are changes to working processes, there is often resistance on the part of employees. Be prepared for this. Hold meetings and air opinions. Try to explain to those who resist why you're implementing the changes and what the benefits are for them. You might want to schedule regular meetings to follow up on the changes for several weeks or months (depending on how big the changes are).

## **Make It An Ongoing Process**

Once you've implemented changes for one task, it's time to start thinking about the next. This continual progression is how long-lasting changes get made. Businesses tackle one process after another, taking all of the time necessary for each to make sure it's running smoothly. Pretty soon, you'll find that you have more time, energy, room for creative work, and cost savings.

Has this this short report proven helpful?

Hopefully, it's provided you with a solid introduction as to how you might start to implement simpler, safer and more productive business processes that help to accelerate your business growth, if that's one of your primary, long-term objectives. And I'm sure that you also realise that there's a great deal more you'll need to do in order to get your business to the level that you truly want.

So, if you want to grow your business quickly, head over to...

**[www.3dConsultingServices.com](http://www.3dConsultingServices.com)**

and see how else we can help you achieve your long term goals faster.

We guarantee you'll be delighted you did!

## About The Author:



Do you ever wish there was an easier way to attract clients?

If you're thinking "Yes, I do!" you're certainly not alone. Many professional service providers feel exactly the same way as you because their expertise is in providing the service that they're qualified to provide, rather than in the selling of it.

And just imagine for a second how much easier it would be, how much happier you'd feel and how much more you could be earning if suddenly you discovered the secret to having a crowd of clients wanting to engage you, rather than you having to go out searching for them.

If our paths haven't crossed before, let me introduce myself. I'm Tim Dodd, a former chartered accountant and specialist business workflow consultant. In simple terms, I help clients put in place processes that attract potential new business automatically.

If you're an entrepreneurial business owner or professional service provider, who would like to automate their lead generation, prospect follow-up and business relationship building processes in order to spend more chargeable time working with your best clients, doing what you enjoy doing most, then I'm certain that I can help you to achieve that goal.

If you like the idea but aren't convinced I'd be able to help your particular business, make an appointment to speak with me today and find out why I'm so confident that I can.

Just head over to [www.3dconsultingservices.com/call](http://www.3dconsultingservices.com/call) and select the appointment time that's most convenient for you.

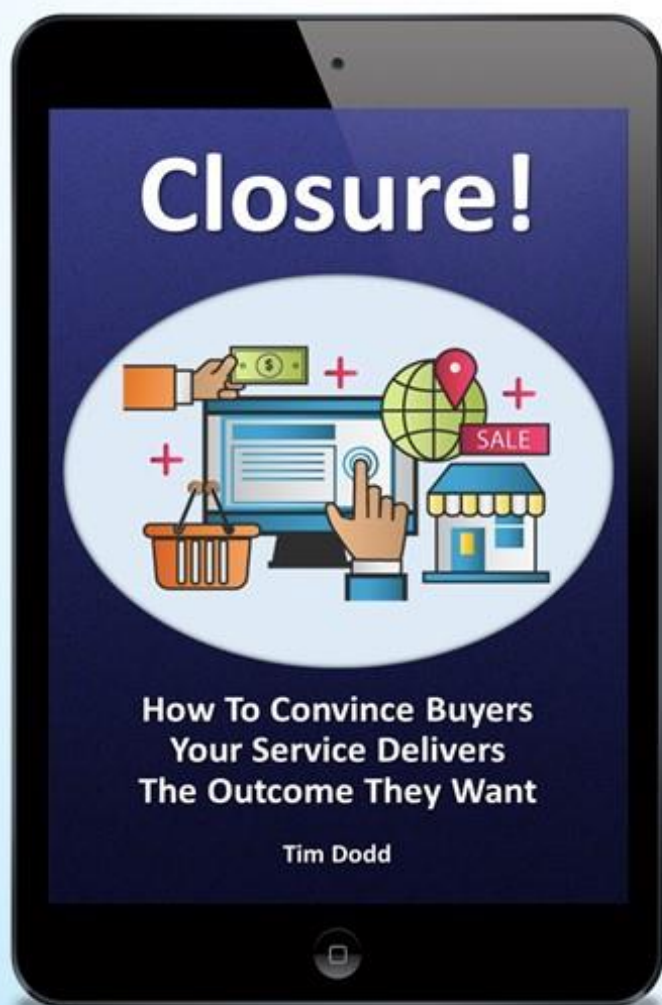
There's no charge, and when we talk I promise to provide you with at least one strategy you could implement immediately which would transform how you won new clients in the future!

And, whether you decide to get in touch or not, may your God always be with you and continue to guide you along the path you've chosen and were created to pursue in order to prosper and live a uniquely fulfilling life.

I truly look forward to speaking with you.

*Tim*

**These Days Traffic Generation Isn't A Problem.  
Convincing Browsers To Buy Is The Challenge!  
Yet, A Few Little Tweaks To Your Website Can  
Soon Fix That When You Know What To Change...**



**Readers Who Implement These  
Changes Truly Appreciate The  
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Every self-respecting business owner would like more paying customers. It doesn't matter what you sell, the end goal of being in business is to keep finding people who want and, more importantly, are in a position to buy the product or service you offer.

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