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POWER OF PROCESSES:

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WORKBOOK

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Analyze Your Processes

Lesson 1: Determine Your Current Business Processes

The purpose of this Workbook is to identify existing processes and to develop new processes for areas in your business that currently do not have anything documented.

Complete the worksheet on the following page.

List all the major processes in your business that needs some documentation improvement or streamlining. (column 1)

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

- Have the highest impact on the success of your business (on sales, profits, customer satisfaction, employee retention, product quality)
- Are currently the most inefficient (in money, resource, resource use, time)
- Have had the most negative feedback (complaints from customers/employees, questions)

Review your completed worksheet and select one **high-impact** process to focus on from beginning to end. Why did you pick that process to focus on?

As a business owner, it is important to make sure you have systems in place and documented. Many overlook or do not understand the value of having things in place in case someone needs to step up and execute them on behalf of the process owner.

Major Processes	High Impact	Most Inefficient	Negative Feedback

The process you'll focus on and why:

Lesson 2: Document What You're Doing Now

When you begin to document the high-impact process you selected in Lesson 1, mentally imagine all of the steps it takes from start to finish.

Use mind maps, spreadsheets, whiteboards or your favorite tool to jot down your thoughts so you can refer back to drill down the documentation process.

Ready?

Create a High-Level Outline

- o   Actually *go through* the process as you typically would
- o   List the main tasks

Document the Details

- o   As you go through your steps, add them to your document with as much detail as possible
- o   Pay attention to actions that cannot happen until others are complete
- o   Pay attention to actions that can be done at the same time as others
- o   Be sure to include everything you need in order to complete the entire process
- o   Would video content be helpful to clarify things for the user?

Lesson 3: What Can Be Done Better

As you are going through your process, pay attention to areas where improvement can be made.

Using the questions below can help you identify if there are any 'holes' or areas where more detail is necessary to complete that process.

- Are you open to explore or invest in new technologies for automation?

- Is the process unclear or incomplete?

- Is it too complicated or involve too many steps?

- Is it a time-drain?

- Is it too resource heavy?

- Are there missing steps?

- What are those missing steps?

- Are the steps provided in the right order?

- Can any steps be removed, or is it necessary that every step remain?

- What will happen if a step is removed?

- Where and why does this process slow down?

- When and why do errors occur?

- How many employee/VA hours does this process take from start to finish?

- How many of those hours are spent on non-essential work?

- How efficient it is regarding material resources use?

- Can the process, or part of it, be automized?

- If you currently do not outsource this, can you?

Where Automation Will Help

As you work through the process, discover and note any areas where automation will help better and more productive.

Lesson 4 Create Your New Power Process

Redesign the process to include the improvements you have identified during your analysis in Lesson 3. Detail with visual elements (screencasts, screenshots, images video).

- o Create all of the visuals
- o Create any training video you want to include

Lesson 5 Show Time! Test, Implement and Communicate

Determine how you will test your process. Will you do it, or have someone run through it, to be certain it is effective?

If necessary, schedule the piloting of your new process.

Determine on your metrics for measuring the success of your new process.

Create a list of any tasks you need to include in order to finalize your new business process.

Have the team member in charge of the process go through the steps to reach the process objective.

Set deadlines for each task.

Task	Deadline	Notes

Set the implementation target date for the first revised process.

Repeat until the process is complete.

Determine on which business process you will work on next. Refer to the first lesson to select based on priority.

Next Steps

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.

Task	Notes	Deadline

Set an implementation target date for your revised process.

Decide on which process you'll work on next. Use the list of priority processes to be developed that you created in Lesson 1 to help you decide.

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