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Novice to Advanced Marketing System

POWER OF PROCESSES:

SUPERCHARGE YOUR BUSINESS

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Introduction and Overview

As you go through this Textbook, keep your Workbook handy so that you can do the assignments in the Workbook as you go through this Te

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"If you can't describe what you're doing as a process, you don't know what you are doing." ~ W. Edwards Deming

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We use processes in our daily life: a set of linked tasks that produce a particular result. These processes include something as simple as taking a shower or washing the dishes.

Turn on the water

Get into the shower

Wash hair

Wash face

Wash body

Wash feet

Rinse well

Get out of shower

Dry off with a towel

Turn shower water off

Then, you have a process for getting dressed.

While these are very basic, simple processes, the overall idea about processes is the same for business processes.

A well-designed business process will simplify and streamline the work that you and your team use. It will be structured as a step-by-step process that leads to a particular result.

Basic Processes for nearly all small businesses

- ➢ Marketing
- ➢ Manage Team Members
- ➢ Customer Service and Support Services
- ➢ Product Development
- ➢ Product Launches

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➢ Social Media
➢ Accounts/Cash Flow
➢ Recruitment

Specific areas or departments in your business may have particular 'topics' or 'categories' unique to them. Each of those process group to create a designed end result, which should tie into your marketing goals for success.

Take content marketing, for example. There could be a process for writing a blog post. The designed result may look like this:

➢ Start with an idea or topic for the post
➢ Research keywords and take notes
➢ Structure the post with headings, subheadings and key points
➢ Write the main content of your blog post, filling details around your headings and key points
➢ Proofread and edit
➢ Add images or other visuals to the body of the post
➢ Optimize for SEO – Title, categories, tags, internal links, outbound links, snippet preview, meta description, etc.
➢ Schedule the post to publish

Your content marketing plan may include other processes, such as an assigned person who reviews, accepts, edits guest posts.

There could also be a system to promote and share the blog posts, and yet another to gather data an analytics on your posts. These should always lead to what it important to you and achieving your business goals.

Inefficient business processes can be linked to the lack of not reaching your business goals.

THIS CANNOT BE STRESSED ENOUGH:
Documenting and Optimizing your systems is key to building a
successful business!

Efficiency in your various areas of your business has a large impact on such things as:

➢ Customer loyalty
➢ Team overwhelm, fatigue or frustration
➢ Overall cost of doing business
➢ How others perceive your business
➢ Marketing consistency
➢ Time management
➢ Your sanity ☺

When you simplify, streamline and develop missing processes in writing that is done over and over, your team is empowered to do as you expect since the process is written and easily available.

Imagine *finally* reaching the level of professionalism because you have taken your team, customers and your vision to a level of quality and expectations, simply by having strong systems in place.

You will be reliable and meet those deadlines. You will be able to react quickly and efficiently. Your profit, productivity and quality of work will grow exponentially.

The best result – you can enjoy working in your business again. This is that first big step of having a better work – life balance.

By the completion of this course, you will be able to:

➢ Determine where you have processes in your business that you perform on a regular basis, and evaluate what you need to work on

➢ Document your current, frequent business processes that you want to improve, empowering you to know what you are doing now and where it impacts your team

➢ Analyze the processes you map out, getting input from your team to determine where any inefficiencies exist and where you can improve

➢ Determine what you will change, outsource or automate any processes needing improvement

➢ Examine and document the details of your redesigned process, so you know exactly how it will work and who is involved in implementing it

➢ Test the new processes to ensure that the team members can easily use them

➢ As you create and update your processes, communicate it to your team as it becomes part of regular business operations

Consider these questions, as you think about the way you currently run your business:

1. What areas can benefit the most right now with focused attention?
2. If you could dramatically improve the way those specific areas run, what impact would that have?

Lesson 1 Determine the High-Impact Business Processes You Have Right Now

Time to make some immediate improvements to your processes.

We tend to overcomplicate things, where many business owners overthink this and freeze.

The result of this type of thinking is that instead of having realistic, well-defined business goals, we find stress and inefficiency. We freeze in place, doing nothing.

There are five common areas of inefficiency in businesses:

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

Identify Your Processes

What processes do you have in place?

Here are some that many businesses use:

➢ **Operational processes**:

- Customer support

- Product/service development

- Marketing efforts

- Sales

➢ Support processes:

- Hiring/recruitment

- Training

- Technical support

- Purchasing

- Accounting

➢ **Management processes:**

- Process improvement

- Planning

- Budgeting

- Getting funding

- Product planning

These processes should have a detailed description on what each one needs to complete that task. These steps should be simple, yet well documented.

Processes Needing Improvement

It is imperative that you identify systems which are the most inefficient, complicated and outdated.

Your highest impact prosses (systems) should be reviewed to determine if there is a way to streamline them.

Pay attention to what team members, customers or contractors provide as feedback, or with repeated questions or complaints. Those flags indicate where something is not working correctly.

Ask yourself:

➢ What is working?
➢ What is not working?
➢ Are there areas needing better communication?
➢ Is a task taking far too long to implement?
➢ Are deadlines being met?
➢ Where are your resources, time and money used the most?

Once you have identified an area that needs improvement, use the remainder of this course to focus on that one item. Once you have gone through that process, repeat the steps for all processes.

Time to begin building your process documentation:

➢ Go to the worksheet in your workbook and list all of your *major* processes in your business you feel could benefit from updates or improvement or automating (this is for column 1).

➢ For the other columns, check all that apply:
  o Highest impact on the success of your business (sales, profits, customer satisfaction, product quality, etc.)
  o The most inefficient (time, money, resources, etc.)
  o Negative feedback as complaints from customer, team, etc.)

➢ Review your worksheet and select the one area you will focus on first. Note **why** you picked it.

Lesson2 Document What You are Doing Now

Time to document how you currently manage and execute that process. By going through the process step by step, you will find where the inefficiencies are and can correct them.

Begin with an Outline

Ideally, if you have someone designated as the person responsible for the task, they should document it. You can be the one that uses their steps to make sure that everything is executed correctly.

Using a white board, pen and paper or a Word doc, begin with simple bullet points of the step by step process.

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Fill in the Details

Go back to where the process begins and add every detail in a way that a person never performing that task before can follow your documentation and execute that task.

You do not need to have complicated, expensive tools to do this. Use what you already use. A whiteboard, paper, mind map, etc. will handle this nicely.

Pay attention to the 'order' that you document the steps. For example, there may be a step which needs to be done before another. Look for opportunities to streamline the process.

Include everything needed to complete that task.

For example:

- ➢ Log in credentials for anything that will require someone to access, such as Facebook
- ➢ Links to resources, such as templates, checklists, tools, etc.
- ➢ Examples of finished product, where applicable
- ➢ Include 'notes' within the process that are helpful to the person carrying out that task
- ➢ Screenshots or training videos
- ➢ Designate responsible person within a process

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 and 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)

Now, you take this 'template' example and document the steps in the process you selected to create.

Lesson 3 Where Can You Do Better?

Upon completing Lesson 2, you will analyze to discover if there any areas you can improve upon. This can include re-assigning the task or streamlining it.

Define the Scope of the Process

Consider the following:

- ➢ 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 people?
- ➢ 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.

It is necessary to really think through the questions to be prepared what impact on the team or your budget by changing a process will take. Regardless, you need to have current processes fully documented.

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Common Problems in a Process

The main problem areas to watch for are:

- ➢ The process is not clear
- ➢ The process is confusing
- ➢ The process is too complicated (too many steps OR irrelevant steps)
- ➢ It is too time-consuming
- ➢ It is resource-heavy

Analyze Your Process

Have you discovered any missing steps? If so, add the detail for all steps.

Whoever is responsible for the process should have input regarding the documentation.

You may have simplified a Blog Post Process:

1. Write a blog post
2. Schedule it
3. Publish it
4. Promote it
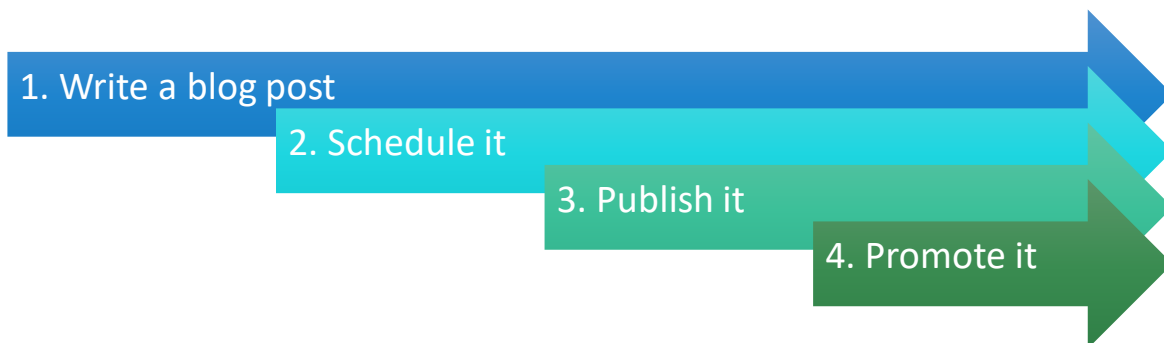
Remember, that while simple is the goal, if you are not fully explaining every step in some detail, the process will not be efficient or correct.

1. Write a blog post
2. Schedule it
3. Publish it
4. Promote it

Can you imagine how a person can feel if this was the only direction she has to do her job successfully?

Can you identify what is missing?

Where are the steps for uploading, formatting, proofreading and editing the blog? Many questions will pop up about how to execute and what to do next. These are the things that cannot be overlooked or assumed that the person 'knows' the details.

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 contractors to help answer these questions.

Can You Automate?

Before jumping into new software and systems, make sure that if fits in your budget and that it is easy for your team to use.

You cannot just 'automate and forget about it' – you will need to make sure it is achieving its goal and how well the team is using it.

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

There are many benefits to outsourcing. The most obvious is the time it will save you. The best part – you only pay for what you need! Plus, skilled contractors mean you do not have to learn and know every tool and software out there.

Some ideas for common outsourcing:

➢ Administrative tasks
➢ Customer support
➢ Accounting
➢ Social Media
➢ Blogging
➢ SEO
➢ Webmaster

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As you identify the holes in your processes and consider outsourcing, be sure to make sure you hire someone already qualified for the tasks assigned to them. You can find professionals on LinkedIn, professional groups, etc.

Determine:

➢ How to change parts of your process. Work through your process using the worksheet in your workbook.
➢ Decide about what you will outsource
➢ Decide what to automate

Lesson 4 Structure Your New Process

Begin with the Basics

➢ Title and Describe the Process
➢ What is the desired outcome?
➢ Determine the beginning and ending points
➢ Assign to responsible person for the task

Document the Details

➢ Have your notes and workbook available.
➢ Include as much detail as possible to avoid confusion or doubt about expectations.
➢ Remember to include all resources and information needed to make it work efficiently from beginning to end. (Refer to previous lessons)
  ➢ 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

Shorter processes are easier to manage and execute. If it has more than 10 steps, you should consider dividing it up 2 or more processes.

Otherwise, the longer process can be intimidating. Some may be likely to rush through our miss important steps.

Provide Context

Defining the position in your overall business can reveal the big picture about the tasks having benefits.

➢ 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.

Provide Visuals

Visuals can be effective, especially when there are long, written processes. You can use graphics, screenshots and even video training clips.

A training video will show the team how you want it done; with the tools they need to execute the process steps.

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.

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.

Lesson 5 Show Time! Test, Implement & Communicate

Once you have completed the Process from beginning to end, you must test it, and have it become part of your Business Operations.

As a person tests it, encourage feedback from them. Assign the person responsible for that process go through it step by step as it has been written. Encourage them to provide feedback about it and make note of anything that is missing or may be unclear.
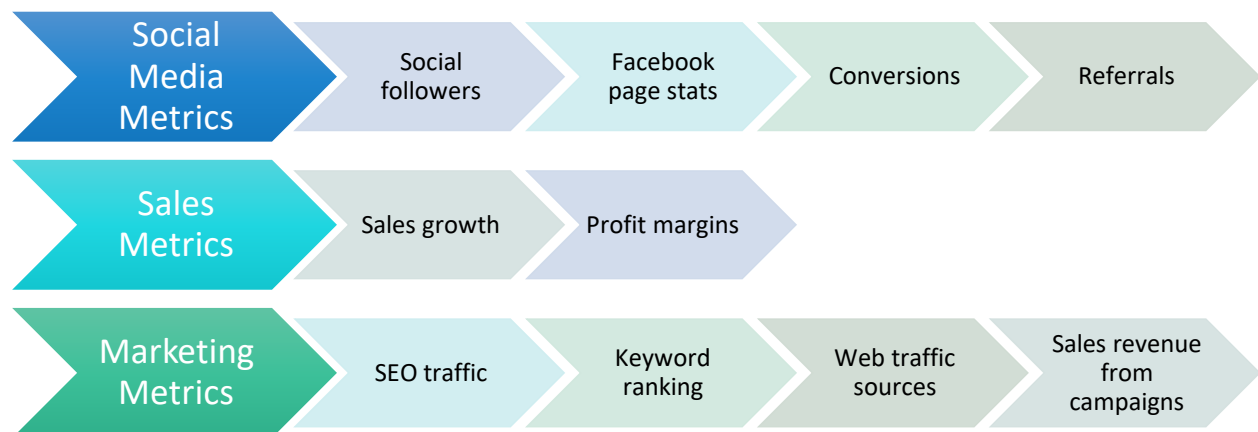
A key part of this testing phase is deciding how you will track and assess the success of your new process.

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

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- ➢ 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. Select from the ideas here or pick something more relevant for you.

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.

Next Steps

Review and finalize the business process and determine the next steps and deadlines. Be ready to implement the process once it has been created, tested and proven to work as you designed it.

Congratulations! Here is what you have learned and created for your business processes:

➢ 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.

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.

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.

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