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Novice to Advanced Marketing System

POWER OF PROCESSES:
SUPERCHARGE YOUR BUSINESS

CHECKLIST

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Summary Checklist

Introduction and Overview

- Processes are a set of linked tasks that produce results
- Business processes show how to do something as efficiently as possible
- Ends with the achievement of a business objective
- Common areas for small business processes include:
- Customer service
- Product development
- Launches
- Recruitment
- Marketing

o Processes in specific areas combine to create a system, such as in marketing
o Include all processes necessary for achieving your business goals
o Documenting and optimizing inefficient processes is the key to remedying them
o How efficiently you run parts of your business has an impact on things like:
  - Team overwhelm
  - How others perceive your business
  - Customer loyalty
  - Time management
  - Marketing consistency
  - Costs
  - Your sanity

o Simplifying processes will result in a number of different benefits in your business:

  - Happy team members
  - Lower costs/higher revenue
  - Create a professional image
  - Provide great customer service

- Grow stronger relationships with customers
- Be more flexible and able to overcome problems
- Consistently meet deadlines
- Increase productivity, profit and quality
- Have more freedom and time

- Learning objectives include:
  - Identify processes you perform on a regular basis
  - Document a frequent process you want to improve
  - Analyze the process you've mapped out
  - Decide how you'll change elements
  - Document details of the redesigned process
  - Test your new process
  - Communicate and roll out your new process

Lesson 1 Identify Your High-Impact Business Processes

- It's time to take a closer look at the processes within the areas that need improvement
- We have a tendency to overcomplicate things
- This results in inefficiency instead of well-defined goals
- Simplify and streamline by having straightforward processes in place
- First identify the most inefficient processes

Identify Processes

- Identify where you spend a lot of time, or processes that have a big impact
- Processes usually come under one of three categories:
  - Operational
  - Support
  - Management

- Operational processes include:
  - Customer support
  - Product/service development

- Marketing efforts
- Sales

  o Support processes include:

  - Hiring/recruitment
  - Training
  - Technical support
  - Purchasing
  - Accounting
  o Management processes include:
    - Process improvement
    - Planning
    - Budgeting
    - Getting funding
    - Product planning

  o Primary processes are likely to have the biggest impact
  o They deliver value directly to customers

Identify High-Impact Processes for Improvement

  o Identify which processes are the most inefficient, complicated or costly
  o Ask for feedback from team members
  o Note problem area that you're already aware of
  o Ask yourself and team members:

  - What's working and what isn't?
  - Where are resources being used most?
  - Where are you spending the most time?

  o Choose one process that you've identified as having the biggest impact and needing the most improvement
  o Keep your list of processes that need improving to return and address them later

Lesson 2 Document What You're Doing Now

- o You need to identify how you're currently doing things to understand where the problems are
- o The person who documents the process should be the one who carries out the task

Do a High-Level Outline

- o Go through the process as you normally would and list the main tasks

Document the Details

- o Go through your steps and add as much detail as possible
- o Look for events that can't happen until others are complete
- o Look for events that can occur at the same time as others
- o Include everything you need to get the job done such as:

  - 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

- o Make a note of where video content could be helpful to clarify things

Lesson 3 Identify Where You Can Do Better

- o Analyze existing processes to identify problem areas
- o Decide how you'll change, outsource or automate elements

Define Your Process's Scope

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- o Define the scope of changes
- o Document what will not be done to avoid future problems
- o Consider:

  - What are your budget limitations?
  - Are you able to purchase new software?
  - Are you able to increase your training budget?
  - What's the timescale for completion?
  - Can you hire new employees?
  - Are you willing to outsource?
  - Are you prepared to make immediate changes to other processes?

- o Responses will limit what you decide to do in your redesigned process

Common Process Problems

- o Main problem areas to look out for include:
  - Unclear
  - Too complicated
  - Too time-consuming
  - Too heavy on resources

Analyze Your Process

- o Ask yourself what is missing and where
- o Make sure the process includes enough detail and information so that it can be easily followed
- o Other questions to ask yourself include:

  - Are all the steps in the right order?
  - Are all the steps necessary?
  - Where and why does the process slow down or stall?
  - Where and why do errors occur?
  - How many hours does it take from start to finish?
  - How many unessential hours does it take up?
  - How efficient is it regarding resources used?
  - Can the process, or parts of it, be automated?

- Can the process, or parts of it, be outsourced?

  - Coordinate with team members to answer these questions

Consider When to Automate

- Benefits of automation include increased productivity, more efficient use of time and better-quality output
- Consider whether automation may complicate your business
- Choose tools that are easy to use to avoid expensive training
- Have a back-up plan in case things fail
- Monitor results to check effectiveness of automation

Automation Tools

- Popular automation tools include:
  - Workflow automation: Zapier
  - 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

- Outsourcing can free up time for business growth
- Maximize productivity and increase efficiency with the expense of a full-time employee
- Commonly outsourced tasks include:

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

- IT

- Which tasks are you currently doing that can easily be delegated?
- What could someone else do as well, or better than you?
- Consider drawbacks of outsourcing
- Could it add more work for you as you may spend more time overseeing work and answering questions?
- Find professionals for outsourcing from your business network, or on outsourcer sites

Lesson 4 Design Your New, Powered-Up Process

- It's time to map out the details of your revamped process
- Establish exactly how it will work and who'll be involved

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

Document the Details

- Map out your redesigned process using the same steps in step 2
- Include all the improvements you identified in step 3
- Document each step in as much detail as possible
- Document sequential tasks
- Process design must include every resource and piece of information necessary to function

Tips and Best Practices for Documenting Powerful and Efficient Processes

Consider the Length of Your Process

o Keep processes as concise as possible, while still including all relevant information
o If your process has more than ten steps, break it into multiple processes
o Consider creating a short version of the same process with outlines of general steps

Provide Context

o Define the process's position within the wider context of your business and give team members the bigger picture
o Motivate team members as they have a better idea of the value of their work
o Identify easier when the process is no longer needed

Use Visuals

o Use visuals to better define steps
o Expand on instructions and demonstrate how something looks
o Make complicated instructions easier to understand

Make Your Process Teachable

o Design your process so it's simple enough to be understood by anyone
o There should be no room for assumptions or confusion

More Tips for Writing Your Process

o Use simple, informal language and avoid jargon
o Front-load any useful information before the task starts
o Provide clear timelines and expectations of quality
o Tell people what they should do, not what they should NOT do
o Anticipate problems and provide solutions
o Automate where it's possible
o Outsource where it's possible
o Create processes to be generic as possible

Tools for Mapping Processes

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- o Some tools for creating diagrams for process mapping include:

  - ConceptDraw
  - Edraw
  - LucidChart
  - Visio

- o Perform a search online for process map templates and best practices

Get Ideas and Input from Internal and External Sources

- o Coordinate with relevant team members for suggestions and feedback
- o Some processes are similar across small businesses
- o Search for examples to use as ideas

Step 5: Show Time! Test, Implement & Communicate

- o It's time to test your process to ensure team members can carry out each step
- o Then you'll roll it out to everyone affected by it
- o It will become part of regular operations

Test Your Process

- o Anticipate and be ready solve resistance to changes you've made
- o Make sure your team knows the reasons for change

Pilot Your Process

- o Pilot your process before you implement it
- o Gather more feedback and address unseen problems
- o Ask questions of the process and request feedback from those carrying out the pilot

Involve Your Team

- o Team members will get a valuable sense of ownership when they're involved in fine-tuning
- o This will make process implementation easier
- o Ways to involve your team include:

  - Have the personal primarily responsible for the process carry it out and make notes
  - Have them demonstrate it to someone else
  - Test the process on someone who doesn't normally carry out the role
  - Create artificial scenarios to test the process

Measure Your Success

- o The metrics that matter here depend on your specific goal
- o You might want to know if:
  - The new process produces the end goal
  - It does it in an appropriate amount of time
  - Customers are happy with the outcome
  - It's cost-effective

- o You might want to measure things such as:
  - Social media metrics
  - Sales metrics
  - Marketing metrics

Implement Your New Process

- o When you're ready to go ahead, you need to let everyone know
- o Carry out employee training where needed
- o Be a visible champion of the new way of doing things
- o Remind employees reverting to old methods of the importance of the changes
- o If employees are still resistant, provide additional training
- o Continue to track the new process
- o Correct problems as soon as they occur
- o Consider outsourcing or automating tasks later on

Next Steps

- o Review and finalize your redesigned process
- o You've learned:

    - How to identify inefficient processes in your business
    - Techniques for documenting processes
    - How to analyse processes
    - How to change, outsource or automate process elements
    - Map out details of redesigned processes
    - How to test new processes
    - How to communicate and implement new processes

- o You're ready to start streamlining your business with your redesigned process
- o Monitor new processes carefully to identify further areas for improvement

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