YOUR **VA** VIRTUAL ASSISTANT

A COMPLETE GUIDE TO AUTOMATING & SYSTEMISING YOUR BUSINESS

The Benefits of Automating and Systemising your Business

Planning your Business System

Documenting your Business Systems

Checklist to review your business system

**How To Systemise
and Automate
Your Business**
PART 1

The Benefits of Automating and Systemising your Business

Documenting and implementing your business systems is one of the best things you can do for your company; without them you cannot be scalable, consistent, productive or efficient.

One of the first systems we ever implemented was our client onboarding process and in doing so we reduced our time on admin, improved our client's initial experience with us and most importantly, significantly improved our conversion of prospects to clients.

UNCONVINCED?

Or perhaps not unconvinced, you know you need to prioritise your business systems but you already struggle with time?

In PART 2 of this series, I'll talk about how to systemise and automate your business while you're working in it, I won't tell you porkies... you're going to need to invest time, but it's doable.

For now, let's concentrate on the benefits!

HOW TO ONBOARD AND QUALIFY YOUR CLIENTS

9 Benefits of Automating and Systemising your Business

INTEGRATE NEW HIRES INTO YOUR TEAM WITH EASE

Whether you work virtually with an outsourcing partner or have in-house employees, procedures help new team members to get up to speed quickly with no negative impact on your business (and no huge time resource required from other team members training them). Induction is a critical part of any company, why not systemise (and automate) it?

CUSTOMERS LOVE SYSTEMS!

If you've developed systems across your marketing and customer service they'll feel pretty impressed, not to mention important and valued! Customer complaints are resolved quickly, marketing is used effectively to engage with and attract ideal clients (and existing ones!), service is consistently high, no matter which team member they are interacting with, in short, your clients know what to expect from you … a consistent high level of service.

REDUCE COSTS THROUGH SYSTEMISATION AND AUTOMATION

Repeating the same task over and over leads to inconsistency, quality issues and cost. Systemisation includes templates and automation to replace manually repeated tasks. *For example*, instead of repeatedly drafting new email replies to frequently asked questions, set up an email template linking to an FAQ page on your site triggered by an inbox rule driven by keywords in the subject line, the template can still be personalized but your not re-inventing the wheel every time. Or respond to Facebook messages using a chatbot (i.e. ManyChat). These automated tools save time (saving costs) while improving your customers' experience.

DOCUMENTING A PROCESS HELPS YOU TO THINK IT THROUGH AND IMPROVE IT

When you focus on one activity for a period of time you're able to look at it with new eyes, seeing inefficiencies you can improve on.

9 Benefits of Automating and Systemising your Business

SYSTEMISING YOUR BUSINESS HELPS SEE WHERE THE PROCESSES FIT TOGETHER

Documenting all parts of your business help you and your team see the bigger picture. What happens if you skip this process and go straight to x? What happens if each month marketing sends accounts a link to this month's landing page to go on your invoices? By working as a team, you improve results.

BUSINESS SYSTEMS TURN A 'JOB' INTO A COMPANY

By moving IP from inside your head into a documented system 'you' are no longer your company. Well organised systems give you the freedom to move from 'working in' the business to 'working on' the business, meaning you can improve your work-life balance while spending more time on higher value-add activities.

IMPROVE THE VALUE OF YOUR BUSINESS

Whether or not you have an exit plan in place, having systemised your business dramatically improves its value. Anyone purchasing your business knows it will run smoothly (without you!) after acquisition.

BUSINESS SYSTEMS IMPROVE CONSISTENCY OF QUALITY ACROSS YOUR COMPANY

Having systems for your business results in a consistency of performance no matter who performs the task or when the task is carried out. Continuous review of processes ensures quality is the same or better each time the task is performed.

YOUR COMPANY WILL BE IN A STATE OF CONTINUOUS IMPROVEMENT

As you develop your business systems you'll incorporate quality control, feedback and review across your business. This helps to highlight problems as they occur and monitor your business, technology and industry for change. A business fully systemised with automated processes is flexible, proactive, reactive, efficient and productive, and should be a leader in its industry.

NOW WE'LL LOOK AT WAYS TO IDENTIFY YOUR CORE BUSINESS PROCESSES AND HOW TO CREATE THE PLAN TO SYSTEMISE YOUR BUSINESS.

How To Systemise
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PART 2

Planning your Business System

LIKE EVERYTHING YOU DO IN YOUR BUSINESS, THE FIRST STEP IS TO PLAN.

By taking time to plan now you'll save time in the future and have a clear goal to work towards, that goal being to create systems for your business to prepare it for the future, while increasing productivity and profitability today. No time like the present! Before you even put pen to paper (or fingers to keyboard) there's a couple of questions to ask yourself and your team.

HOW ARE YOU GOING TO USE YOUR SYSTEMS?
They'll very quickly lose their value if filed and forgotten. Work them into your day to day routines so they remain current. We'll discuss further in this eBook a system to keep your systems up to date but as an example, we refer directly to SOPs from our project management template tasks.

WHO WILL HAVE ACCESS?
Some businesses have areas of their SOPs available to clients as a way of adding value for them. Some examples may be access to templates they use on a regular basis, resources you refer them to, or examples of your SOPs they can use in their own business. Other businesses prefer to keep internal and external processes in completely separate systems as a quality control.

WHERE WILL YOUR SYSTEMS BE STORED?
If you can, use something your team is familiar with and will be confident using – it should be accessible across devices and secure. We have a Google site for our own systems and do the same for each of our clients when setting up their systems. This is our 'library' and reference point and as such is version controlled and audited regularly.

ARE YOU ALREADY USING A SYSTEM?

IF SO, NO NEED TO RE-INVENT THE WHEEL…

The fundamentals of setting up a business system outlined in this resource apply whether you're using Word docs, Dropbox, Asana templates, dedicated procedural software or another system already integrated into your business.

The final stage of planning your business systems is to decide where your documentation will be saved.

You may choose to invest in software written specifically for your processes (such as *Sweetprocess*, use a *Google Site*, or cloud based storage such as *OneNote*, *Drive* or *Dropbox*.

GO TO SWEETPROCESS.COM

If you can, use something your team is familiar with and will be confident using, it should be accessible across devices and secure. We have a Google site for our own systems and do the same for each of our clients.

PLANNING THE PROJECT

When helping clients with their business systems we use a project brief template ensuring we have key information outlined at the start of the project for stakeholders to see.

CLICK HERE TO DOWNLOAD YOUR FREE PROJECT BRIEF

[Complete the template for your project systemisation and upload it into your project management system or a shared space your team can easily access]

This is a living document and you'll find you edit it constantly as you systemise your business. Use it for your team meetings to measure and review progress.

NEXT WE'LL TALK ABOUT HOW TO USE THIS BRIEF TO TRACK YOUR PROGRESS, SO SAVE YOUR BRIEF SOMEWHERE SAFE!

BUSINESS PROCESSES

A small business in start-up phase will have the following four core processes:

- Customer Strategy & Relationships (Marketing)
- Employee Development & Satisfaction
- Quality, Process Improvement & Change Management
- Financial Analysis, Reporting, & Capital Management

As you reach your growth phase you'll start to develop the following:

- Management Responsibility
- Customer Acquisition (Sales)
- Product/Service Development
- Product/Service Delivery
- Accounting Management
- Technology Management

CLICK HERE TO DOWNLOAD THE SPREADSHEET YOU'LL USE NEXT
[In a spreadsheet, write each of the above core processes in a separate column]
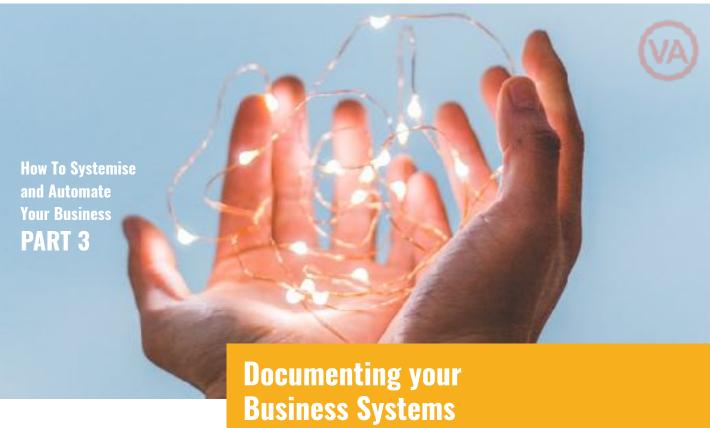
Over the next month, add each activity, task and project you and your team work on as a sub-process in the relevant column (1 row per sub-process).

This spreadsheet forms the foundation of your business system.

As you and your team populate the spreadsheet, making notes on desired outcomes, tools/apps/software used, quality control and feedback, measurements, critical factors (risk prevention), strengths and weaknesses. Refer back to these notes as you start the next part of your business systems: the documentation.

You've now planned the systemisation of your business. Well done you!

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PART 3**

Documenting your Business Systems

Now it's time to fill in the gaps and cement that foundation we started to build last week...

○ You have your project brief.

○ You have your processes documented in your SOP Master Spreadsheet

○ What you don't have is the documentation to back up those processes. Time to roll your sleeves up!

[Open your SOP Master Spreadsheet again, now I want you to add some columns (see columns K to P in our example)]:

○ Priority (how critical is this process to your business)

○ SOP Stage (standard operating procedure – in progress, testing, completed, reviewed)

○ AOR (area of responsibility – who is creating the SOP)

○ Creation date (when was the SOP created)

○ Tested date

○ Review date (we recommend quarterly but this may change depending on the priority of the SOP)

DOWNLOAD SPREADSHEET   **DOWNLOAD PROJECT BRIEF**

Documenting your SOPs, while having the obvious benefit of documenting IP in your business, also helps to improve how efficient, effective and productive your processes are.

The very act of videoing, screenshotting or writing how you do what you do means you and your team think about what, how and why you do what you do.

HOW TO DOCUMENT YOUR SOPs

○ Next time you do the actual task you're creating a standard operating procedure for, open the SOP template and save in your SOP library.

○ Link to this doc from your master process spreadsheet.

○ Fill out the SOP as you're doing the task. You want anyone in your organisation (with the required skillset) to be able to complete this task by following the SOP. Use a mixture of text, screenshots and video to document instructions.

○ Once completed, update status in your SOP tracking sheet and move to testing.

DOWNLOAD EXAMPLE OF SOP TEMPLATE

TESTING THE SOPS

An SOP has no value if it cannot be used by members of your organisation to perform a task or process. Testing ensures the SOP is clear, accurate and has all relevant information needed to be a complete SOP.

HOW TO TEST YOUR SOPs

○ Identify a team member who can review the procedure, preferably someone not familiar with the task.

○ Ask them to perform the task using the SOP as a guide.

○ Get feedback of areas of weakness or confusion.

○ Update where needed.

○ Update version control details with date of testing/approval.

○ Update status in your SOP tracking sheet.

NEXT WE'LL LOOK AT THE MOST IMPORTANT PART OF YOUR BUSINESS SYSTEMS, REVIEW. UNTIL THEN, HAPPY DOCUMENTING!

VA

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PART 4

Checklist to review your business system

	YES	NO
Are all processes in your system now documented?		
When reviewing feedback (internal and external satisfaction) and quality control checks, are there opportunities to improve the process?		
Are the SOPs being used		
Are the SOPs being updated as needed or when it comes time to review are major changes needed?		
Which performance standards are being measured and are these same measurements improving?		
Is their sufficient focus on system details to eliminate most bottlenecks, inefficiencies, waste and rework?		
Are tools/apps/software being leveraged to their full potential?		
Do your business systems mean every process can be performed without impacting customers or your business independent of individuals?		

IN ORDER TO GET THE MOST OUT OF YOUR BUSINESS SYSTEMS AND USE THEM AS A TOOL FOR CONTINUOUS IMPROVEMENT, REVIEW IS ESSENTIAL

A process will become obsolete with something as simple as a software update for one of the tools you're using.

Constant review means the work you have done today continues to add value tomorrow and is an opportunity to improve how your business grows.

CHECKLIST

Review your SOPs

	YES	NO
Can the task be performed using the SOP independently of individuals (assuming skill level is consistent)		
Is the SOP up to date?		
Is there a manual or routine function within the SOP that could be automated?		
Are all hyperlinks up to date?		
Is there a quality control and feedback element to the SOP?		
Is this process being measured and reported?		
Is best practice being followed for the SOP?		
Are instructions in the SOP implemented in the business (i.e. are staff following the correct SOP)		
Are there multiple versions of the SOP in various locations (document control)?		

THIS CONCLUDES OUR GUIDE ON HOW TO SYSTEMISE AND AUTOMATE YOUR BUSINESS.

YOU SHOULD BY NOW...

○ Understand (and believe!) the benefits of business systemisation

○ Have planned your own business system

○ Starting documenting your business SOPs

○ Have a process for continuous review and improvement of your business systems.

As new technology, automation, industry advances, customer needs and opportunities arise, you are now in the best possible place in terms of operational excellence to take advantage of change.

In having business systems in place your organisation is prepared for scale and well on it's way to being a leader in your industry.

GO FORTH AND CONQUER!