WORKSHEET

PROCESS CREATOR

ONTRAPORT

ABOUT THIS WORKSHEET

Well-documented and established processes are the core of your business. They are the intellectual property that makes your business successful and ultimately sellable. This worksheet will guide you through creating processes for every role in your company. You'll learn the best practices for documenting, organizing and improving your processes to set yourself up to scale your business.

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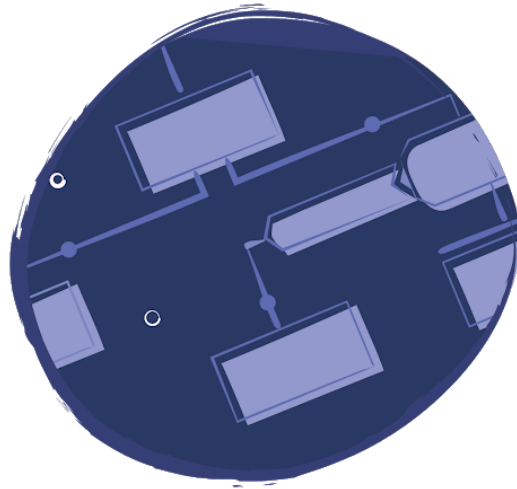
CHAPTER 1

WHY YOUR BUSINESS NEEDS PROCESSES

Creating systems and processes is key to building a business that is easily scaled and improved. When your business is broken down into processes, every key task that keeps your business running becomes predictable, delegatable, measureable, improvable, scalable, automatable and sellable.

Processes are:

PREDICTABLE

Creating processes ensures that tasks are completed in the exact same way every time, leading to predictable and consistent experiences for your employees and customers.

DELEGATABLE

With clearly defined processes, you can easily train any team member with the required skills for completing the tasks. Being able to delegate processes ensures you're not reliant on specific employees to keep your business running and allows you to reallocate tasks based on each employee's skills.

MEASURABLE

By performing your processes the same way each time, your results become measurable. This means you can easily track your results and predict outcomes from each task.

IMPROVABLE

When something is measurable, it is also improvable. When your processes are performed the same way each time, you can look at your measured results to pinpoint what's working and what's not — allowing you to continually enhance your processes for optimal performance.

SCALABLE

Once you have systems that are predictable, repeatable, measurably working and clear enough to successfully delegate, doing more becomes a simple matter of adding resources.

AUTOMATABLE

Once your processes are documented, you can automate all or part of the process to improve consistency and scalability. This frees up time for your workforce to focus more on tasks that require creativity and human intelligence.

SELLABLE

People don't buy your business, they buy your business's systems. This means that even if your whole team left, customers could count on your business's systems and processes to still create the experience they paid for. Creating optimized processes is the key to selling your business.

When Should You Implement Processes?

Any business at any stage, from new startups to large companies, should set up processes as soon as they perform their first task. If you don't have any processes in place yet, though, it's never too late to start.

The sooner you start setting up processes for each task within your business, the easier it will be to change or scale those processes, train others to perform the processes and, most importantly, sell those processes — often a company's ultimate goal.

Are you ready to implement processes? If any of these statements sound like you, creating processes for every job performed within your business is your next step.

- You want to a run a business that is organized and optimized for selling.
- You perform repeated tasks in your business.
- You train new employees (or will in the future) or delegate tasks to other team members.
- You're interested in automating some of your processes to improve efficiency.
- You're struggling to keep up with all the tasks and to-do's within your business.
- Difficulty managing the internal workload is negatively impacting your ability to attract and retain customers.

CREATING A PROCESS: WHAT DOES IT LOOK LIKE?

Developing processes is as simple as documenting the exact steps involved in correctly executing a project or task. By keeping a record of these steps, you'll be able to easily spot areas for improvement, automation or growth to consistently optimize your processes and delegate these tasks to other members of your team.

Start With the "Why"

The first and most important step in developing any process is to explain the "why" behind it. What is the point of this task; why is it important, and what is this process trying to solve? By explicitly stating the purpose of the process, any employees who take on the project in the future will know the value of what they are doing.

Human beings are going to be running your processes in the beginning. If you don't explain why you're asking them to do certain things, they might not be motivated to successfully complete them, and you'll eventually lose some the value of implementing the process in the first place.

Document Responsibilities

The next step in creating processes is to list all the responsibilities of each position in your company and have employees write the detailed processes involved with those responsibilities.

Employees may not always remember every task they perform daily, so it's recommended that you start by having them keep track for a week or two. They can simply jot down their processes as they go, or use an online time tracking tool. After they've documented their tasks, you can create and document a process for those tasks.

Keep in mind that even if your business is a one-person show right now, creating processes from the very beginning will lead to smooth employee onboarding and delegating in the future. Also, documenting your current processes will allow you to uncover the time-consuming tasks that don't require your specific skills so that you can determine what type of skills to look for when you're ready to hire an employee. This also helps you spot areas that you can automate to streamline your efficiency.

Pay Attention to Details

When writing out detailed processes, be sure to cover all the little things, such as how often the process is completed, who the process owner is, links to pertinent resources, and login information for software used to complete the process. You want to ensure that whoever needs to complete these tasks has all of the information and tools needed to do so.

Organize Your Processes

Documenting all of your processes is a great start, but if there's not a process for storing your processes, then team members will struggle to benefit from your hard work.

Storing your processes in an easy-to-find, communal platform means employees can easily find the information they need without distracting managers or wasting time searching for instructions. Further, when an emergency arises, your employees will know exactly where to find the processes for handling each scenario.

Process documentation can be distributed many ways. Smaller companies might opt for physical binders in communal work areas or for each employee, while others might go digital and put their processes in a knowledge base, such as Google Drive, or use a more complex tool, like Confluence, that can link to project management software.

Although the documentation of your processes might take time and effort upfront, your processes will ultimately reduce the time it takes to complete tasks and keep you from the cycle of impromptu scrambling.

Three Places to Start Creating Processes

1. Any role where a new employee needs to be trained or an old employee needs to leave and be replaced
2. Any role or task you urgently need to delegate
3. Wherever your business most urgently needs improvement

Where should you begin creating processes for your business? Fill in your response to each of these statements that is true for your business to help you determine a good starting place.

1. I have a high employee churn rate for these positions:

   _____

2. I am or will be training employees for these positions:

   _____

3. I perform daily, repeated tasks that take up too much of my time, such as:

   _____

4. My business urgently needs improvement in these areas:

   _____

5. Parts of my business are just rote, repeated tasks that must be done to keep the business running, such as: _____

6. I have employees who could take over some of my tasks, such as:

   _____

7. I want to know how my employees do certain tasks, such as:

   _____

Your responses should give you an idea of a few processes you should start documenting now.

CHAPTER 3

THE PROCESS CREATOR WORKSHEET

To effectively document your processes following the guidelines mentioned above, we've developed the Process Creator Worksheet. It includes step-by-step instructions on how to create processes with an easy-to-use, fill-in-the-blank template.

Every task in your business should fit easily into the worksheet, from managing payroll to allowing membership access to your site. Using the worksheet should be the basis of documenting your processes and can be followed by printing out or digitizing the worksheets for organization.

When filling out the Process Creator Worksheet, think about additional details that will make your processes more user-friendly. For example, how will you title your processes? Where will you list the links, tools and login information needed to complete the tasks? Each business is unique, and changing or adding additional sections to the worksheet to fit your business model might be necessary.

You'll use one worksheet per process, so you'll end up with numerous process documents that you can store for your team to access.

THE PROCESS CREATOR

SECTION ONE: PROCESS OVERVIEW	
WHY: What is the purpose of this process?	
TITLE: What is this process called?	
SUMMARY: Describe the process.	
INTERVAL: How often does this process need to be completed?	

SECTION TWO: PROCESS EXECUTION	
STEP 1	
STEP 2	
STEP 3	
STEP 4	
STEP 5	
STEP 6	
STEP 7	
STEP 8	
STEP 9	
STEP 10	

SECTION THREE: REPORTING	
WHO: Who should this be reported to?	
WHAT: What are you expecting to see in the report?	
WHEN: When would the person reviewing this report like to get it?	
HOW: How should the report be delivered?	
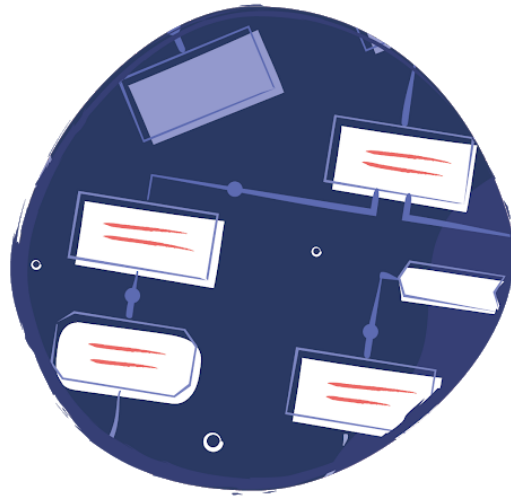
CHAPTER 4

IMPROVING YOUR PROCESSES

After you've documented your processes, you'll have a clearer picture of the tasks your company runs on and be able to identify areas for improvement, now or in the future.

Delegating

Your job as a business owner is to be constantly working on your business, not in it. This means that tasks that don't require your specific knowledge and skills and won't lead to innovation and growth, can and should be delegated.

Look through through the processes that both you and your employees perform. Starting from the top (with you) will allow you to disperse your roles downward, making sure that each task is being handled by the best person for the job.

For example, if you perform a task that is difficult but can be done by others on your team, delegate that task to them and see if there's a task they do that can be delegated to someone else, too. The delegation process might end up with the need for additional employees or a change in roles and should, no matter what, end with each employee utilizing his or her individual skills and knowledge to better your business.

Automating

Some processes that are delegatable might be best delegated to an automation system. Automation is one of the most compelling benefits of process creation because it can cut costs, save time and, most importantly, help scale your business. That means you can do everything at a higher volume and at a higher profit.

When choosing to automate, first make sure your processes are simple and clear. Automating bad processes is a quick way to turn out a lot of poor experiences. If possible, do things manually before turning anything over to automation.

Improving

After you've created your processes, you should still be consistently looking to improve and update them. Keep your processes in a place where they can be easily updated, refined and improved upon. When employees perform the tasks and find that something can be more easily done or can be more effective performed a different way, you'll want to be able to change the process in a way that everyone on the team can see, learn and use. An agile software can help you do this, as well as any internal record keeping tool like Google Drive. Improving your processes means improving your business.

ONTRAPORT

ONTRAPORT's mission is to support entrepreneurs in delivering their value to the world by removing the burden of technology. We deliver on that mission by creating software, offering services, and educating the entrepreneurial community.

For over a decade, we have made a difference for thousands of businesses, their communities, and our own staff, which is why we've received countless awards for innovation, revenue growth and company culture.

Our flagship marketing automation product is a subscription software that provides our customers with all the tools they need to start and grow their businesses through the advantage of an all-in-one platform. In addition, we offer a large collection of free resources, courses and educational products that support entrepreneurs at all stages throughout their journey.

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