SYSTEMology

The system for systemising your business.

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The 7 myths of business systemisation

Myth 1:

Myth 2:

Myth 3:

Myth 4:

Myth 5:

Myth 6:

Myth 7:

Define:

Assign:

Extract:

Organise:

Integrate:

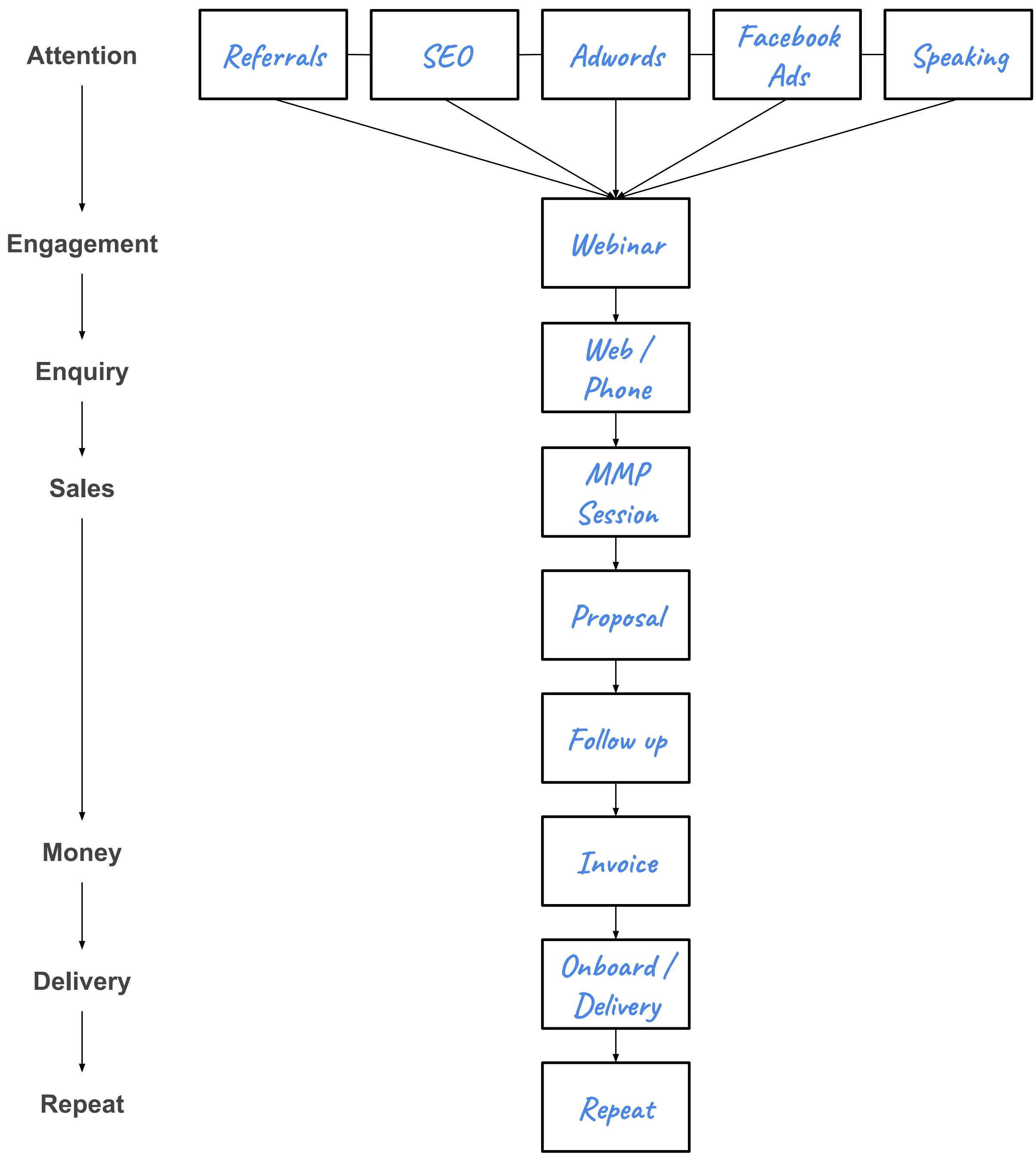
Scale:

Optimise:

Critical Client Flow (CCF)

Target: Franchisors

Product: Authority Website Builds

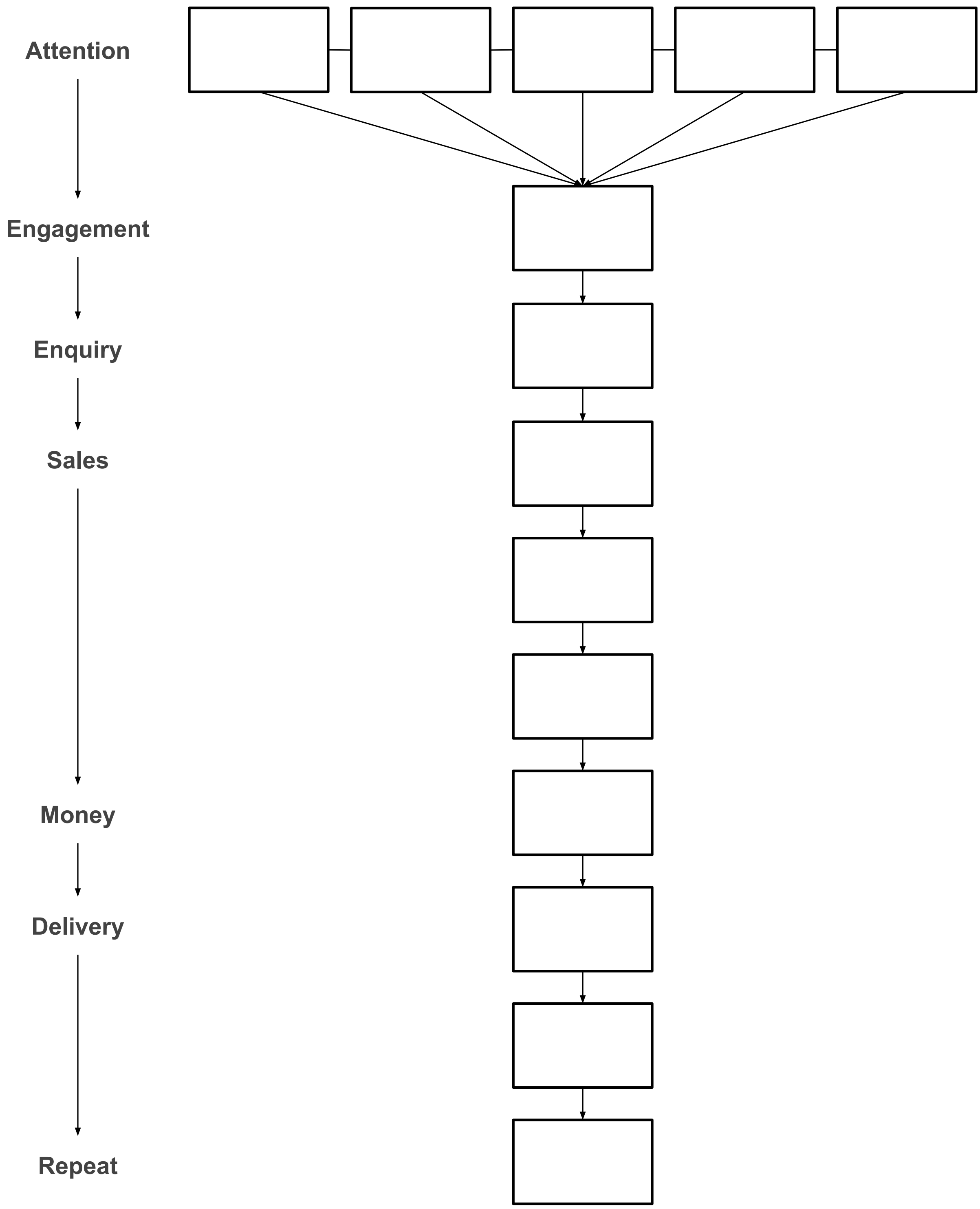


Critical Client Flow (CCF)

Target:

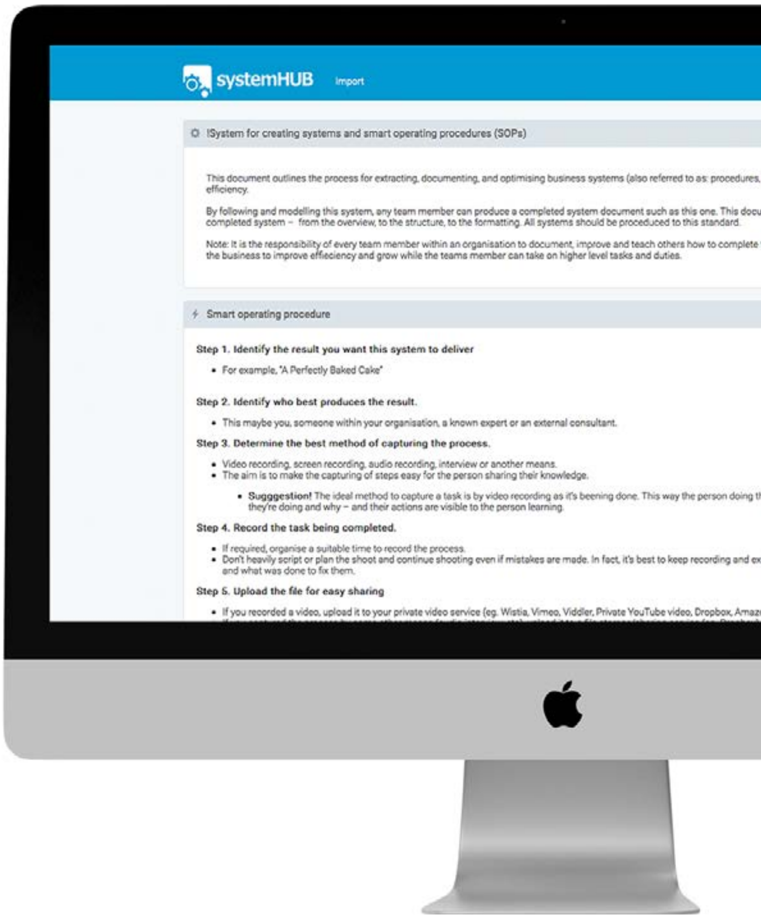
Product:

your logo HERE



SYSTEMology®

As the business owner, you're the worst person to create systems within your company. And the best news is, you don't have to create the systems yourself—I'm going to give you the system that enables your team, and the people you work with, to do it for you.



Using the *System for Creating Systems*, any team member can document, organise and optimize how they did things—this system completely takes you out of the loop! This system, coupled with a few smart team members, will set off a chain reaction in your business like knocking down the first domino in a series.

So, here it is... **my System for Creating Systems** - click here.

Please note: We're always testing, tweaking and improving it so the active link above ensures you're reviewing the most recent version.

Click: **www.systemHUB.com/SOPtemplate**

Tap for offline reading

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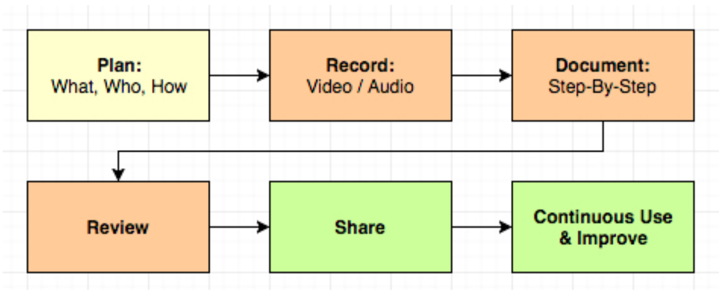
! The System for Creating Systems

This document outlines the process for extracting, documenting, and optimising business systems (also referred to as: procedures, processes, SOPs) for maximum efficiency.

By following and modeling this system, any team member can produce a completed system document. This document is an excellent example of a completed system – from the overview, to the structure, to the formatting. That's not to say your systems will be to this standard with your first draft but rather one to aspire to. Systems often take time to mature with regular use and continued improvement.

Note: It is the responsibility of every team member within an organisation to document, improve and teach others how to complete tasks within their role. This creates business efficiency and new opportunities for each team member.

Smart operating procedure



Step 1. Identify the result you want this system to deliver.

- For example, "A Perfectly Baked Cake".

Step 2. Identify who best produces the result.

- This maybe you, someone within your organisation, a known expert or an external consultant.

Step 3. Determine the best method of capturing the process.

- Video recording, screen recording, audio recording, interview or another means.

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- The aim is to make the capturing of steps easy for the person sharing their knowledge.
    - **Suggestion!** The ideal method to capture a task is by video recording as it's beening done. This way the person doing the task can simply talk through what they're doing and why – and their actions are visible to the person learning.

Step 4. Record the task being completed.
- If required, organise a suitable time to record the process.
- Don't heavily script or plan the shoot and continue shooting even if mistakes are made. In fact, it's best to keep recording and explain mistakes if/when they happen and what was done to fix them.

Step 5. Upload the file for easy sharing.
- If you recorded a video, upload it to your private video service (eg. Wistia, Vimeo, Viddler, Private YouTube video, Dropbox, AmazonS3 etc).
- If you captured the process by some other means (audio interview, etc), upload it to a file storage/sharing service (eg. Dropbox).

Step 6. Create new system in systemHUB.
- Identify the best location for the system.
    - **Suggestion!** Create folders based on business departments (Sales, Finance, Operations, etc.) and subfolders as needed.
- Keep the system names clear, concise and contains keywords that team members would use when looking to locate it.
- Add an overview that covers: what is the system is about and what results/deliverables are achieved from following the system.
- If applicable, post the link to the video of the task being completed in the videos section.
- If applicable, post the link to any other files used in capturing the process in the "Supporting Notes" section.
- Assign the system's primary owner (the person who is taking ownership of the system) and secondary owner (usually a 'backup' person for the task).
- Assign any additional team members who should be able to view/assist in the system's development.
- Change the status of the new system to to reflect the stage it's in:

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- **Grey – New system, nothing done.** You may be just 'dumping' data in a system with this status but haven't looked at organising anything in it yet.
- **Yellow – Under construction.** You have started working on the data in the system, but it's not at a point where others can use it yet.
- **Green – Ready to be used.** The system is completed enough to the point that others can reference it and get to the end result by following the steps.
- **Red – Do not use.** The system may be obsolete, incorrect or inaccurate, so you don't want others to use it. But it may have some value in it still so you don't want to delete it altogether.

- Notify the new system's owner (if not you) that the system is ready for review.

Step 7. Create the step-by-step documentation.

- The new primary owner of the system (which may be you) should either complete or delegate this step.
- That person should watch the video recording (or reference the link/s supplied in the Supporting Notes section) and note down the steps to a linear fashion. That is, Step 1. Do this. Step 2. Do that.
- Save those direclty into the "Smart Operating Procedure" section.
- Include additional sub bullet points for further details and clarification comments.
    - **Suggestion!** Once done, a reader should be able to get a good overview by simply reading the numbered steps – bulleted items simply provide extra detail for someone new to the task.
- All steps should be clear enough to allow anyone with a basic understanding of the subject to complete the system.
    - **Suggestion!** Ensure that the formatting of the text is uniform. Each step should have its own number and each number should have bullets only relating to that step.
- Also ensure email templates and/or any documents mentioned in the system are attached to the relevant spot in either the "email templates" and/or "attachments" sections.
- Add any additional useful information which isn't necessary to be added within the SOP itself (sort of like a 'footnote' in a book) in the "Supporting Notes" section at the bottom of the system.

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Step 8. Review system on the next use.

- Review the system on the next iteration of the task.
    - **Suggestion!** With fresh eyes, review the entire system from top to bottom with fresh eyes.
- As you work through the task using the system, add any missed steps and/or make improvements where necessary.

Step 9. Submit for review and discussion.

- Once satisfied, the system is ready for review by the supervisor and/or to be discussed at a team meeting.
    - **Suggestion!** System owners are responsible for having their systems reviewed and approved.
    - Reviewers can add comments to a system with suggested changes.
    - The system gets tweaked based on additional feedback.
    - The system owner makes adjustments and replies to comments regarding any changes.
    - Once done, the system's status is set to green - indicating it's now ready to use.
        - **Suggestion!** You can also notify assigned users that the system is now ready for use.

Step 10. Teach this system to another team member.

- Ideally it's best for the system owner to teach their SOP to someone who hasn't previously done it before.
- During this process, areas of confusion, issues and missed points can easily be spotted and fixed.
    - **Suggestion!** This is best taught in 3 steps – 1. Show the task being completed 2. Do the task together 3. Allow the task to be completed by the team member and review and give feedback.
    - Continue step 3 until the team member completes the tasks succesfully without feedback required.

Step 11. Use every time the task is to be completed.

- When new team members needs to complete the task, they're assigned access to view the system.

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- The system is improved and tweaked at each opportunity making it as simple/efficient as possible.
    - **Suggestion!** Unless you are a system owner or secondary owner, suggested changes should be made as a comment on the system itself - to be then reviewed and approved by the system owner.

Videos

A video explaining "The System For Creating Systems" in more detail.

Supporting Video: TEDx Presentation:
A Better Life With Simple Systems

Supporting Notes

- Suggested Reading:
  - [The System for Creating Systems] - David Jenyns
  - Checklist Manifesto – Atul Gawande
  - The E-Myth Revisited – Michael E. Gerber
  - Built to Sell – John Warrillow
  - Work the System – Sam Carpenter

Organise

Important: Don't get hung up on finding the perfect software. As long as you split SOP management and project management and tick the main boxes, you're on the right track. This guide is simply to help you should you not yet have something in place.

Project Management Software Buying Guide

Purpose: Manage the “who does what by when.”

☑ Ensure your team likes it since they’re the ones who will use it!
☑ Intuitive, easy to use, and doesn't require lots of training to start using it.
☑ Allows assigning of tasks, deadlines and tagging team members.
☑ Creates task list templates that can be duplicated.
☑ Tasks allow descriptions and links can be added.
☑ Sub-tasks can be added under tasks.
☑ Provides a single, central location for your project managers to know status of all projects.
☑ Control permission levels and project visibility at the team member level.

Recommend platform: www.asana.com

SOP Management Software Buying Guide

Purpose: Stores your “how to” and policy documentation.

☑ Intuitive, easy to use, and doesn't require lots of training to start using it.
☑ Ensure the included features are relevant - unnecessary complexity is the enemy of great systems.
☑ Ensure it's dedicated to its purpose. Project management software is good at project management, SOP management software is good at managing SOPs. But when either tries to do both, efficiency disappears.
☑ Ability to assign users to roles/departments.
☑ Control permission levels and restrict what team members can and can't see.
☑ External sharing feature for members outside your organisation.
☑ Ensure it works independently of your other tools.
☑ Comes with best practice systems, processes and policy templates.
☑ Ability to embed videos, files and email templates directly to systems.
☑ Allows for easy data export so you're not locked in.

Recommend platform: www.systemHUB.com

Selected project management software: ____

Selected SOP management software: ____

We ❤ systems.

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