Your Guide to Systemising Your Business

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Introduction

For the stressed, overworked owner of a small business, business systemisation brings a host of significant benefits:

Personal benefits

- You effectively and confidently delegate tasks others can do.
- You claw back more time to work ON your business.
- You claw back more time to do the things you are best at and enjoy.
- You create a business which depends less on you.
- You claw back more time to spend away from your business.
- You regain a sense of control over your business.
- You experience less personal stress caused by mistakes made in your business.
- You feel proud to run a more effective and efficient business.

Financial benefits

- You execute business tasks faster and more consistently.
- You retain happy customers who enjoy an efficient and consistent service.
- Your existing customers are encouraged to buy more from you.
- You gain new customers through consistent, effective sales and marketing systems.
- Your business becomes a more valuable asset to potential buyers.
- You create a blueprint for your business which you can replicate.

Team benefits

- Your team members feel empowered through knowing how to do their jobs without running to you.
- Your team members have access to business knowledge and can effectively and efficiently fill in for one another.
- Your team members have an input on the improvement of your systems and the pursuit of best practice for your business.
- New team members are more quickly (and cost effectively) inducted into your business.

We appreciate that approaching a business systemisation project can feel overwhelming and that this can lead to a business owner putting it off and missing out on these benefits.

This guide breaks down the process of systemisation and shares the logical, effective steps you can take to help you get going with systemising your business.
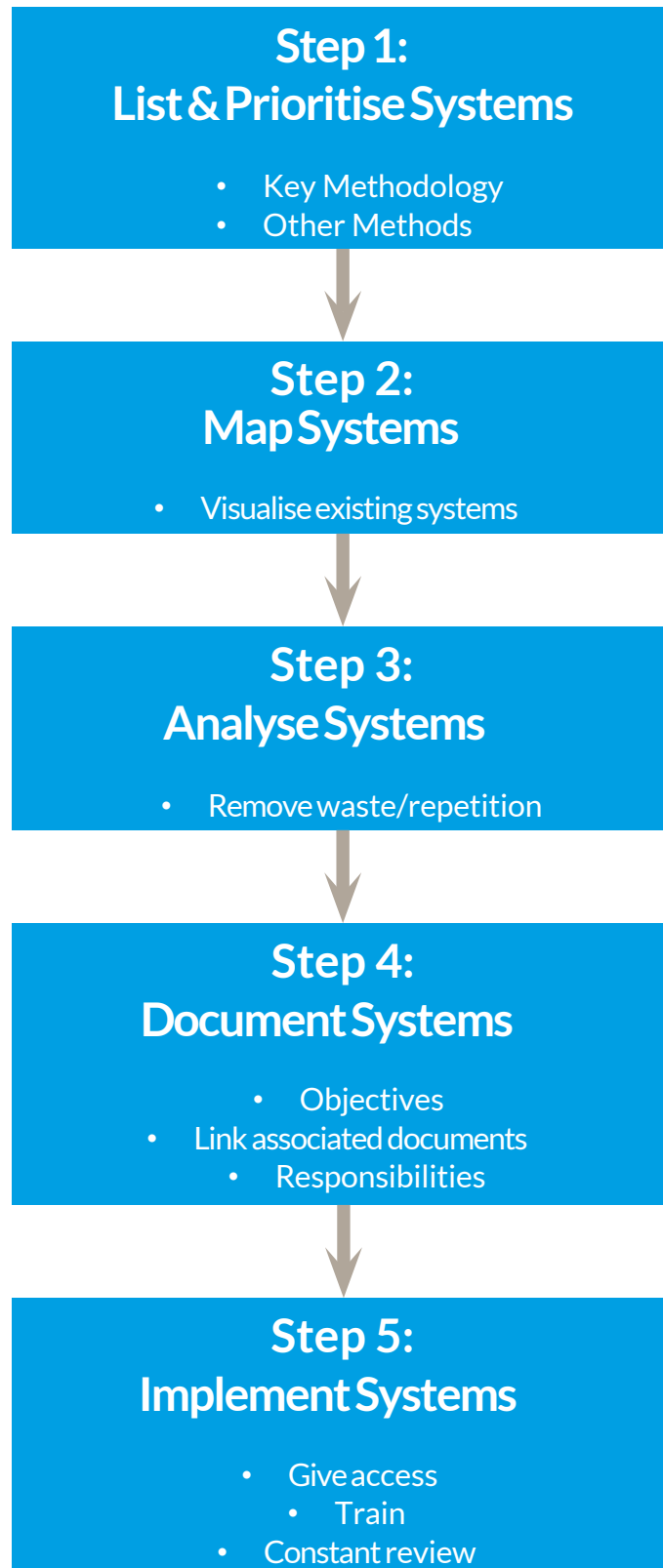
Support with your Systemisation Project

Successful business systemisation requires a systems culture in your business.

As the leader of your business, it is down to you to gain your team commitment and buy in to the systemisation process, before you kick off the project.

This involves a considered introduction to the project, as well as ongoing effective communication and a structured plan to roll out your prioritised systems across your business.

Contact us on 01249 712074 or email theteam@cvag.co.uk if we can help you to get this right. We'll gladly share our experience and insights of systemising our business and supporting our clients to do the same.

The Systemisation Process

Step 1:
List & Prioritise Systems

- Key Methodology
- Other Methods

Step 2:
Map Systems

- Visualise existing systems

Step 3:
Analyse Systems

- Remove waste/repetition

Step 4:
Document Systems

- Objectives
- Link associated documents
- Responsibilities

Step 5:
Implement Systems

- Give access
- Train
- Constant review

Guidance on each of these steps follows.

Step 1: List and Prioritise Your Systems for Attention

- **Key Methodology for Prioritising Your Business Systems**

Start by categorising your existing systems into the following five areas for attention in the following priority order:

1 GUIDING THE BUSINESS	**Your leadership systems, including:** • Holding & running board meetings • Systems to feed back key information (accountability & KPIs) • Strategic review & business improvement systems • Leadership communication systems
2 DOING THE BUSINESS	**Your operational systems, including:** • Customer communication systems • Service delivery systems • Product production systems
3 GETTING THE BUSINESS	**Your sales & marketing systems, including:** • Customer feedback systems • Measuring your marketing return on investment (ROI) • Pricing systems • Business development systems
4 SUPPORTING THE BUSINESS	• **Your HR & team communication systems** • **Your finance systems** • **Your administration systems**
5 PROTECTING THE BUSINESS	• **Your legal systems** • **Your regulatory reporting & filing systems**

This method gives initial priority to the systems that support you in your role as the leader of your business, before focusing on your customer-facing operational systems at which your business must excel in order to maintain performance.

Following this, the systems that promote the growth of your business are prioritised, before the background systems that support your daily operations.

Lastly, the mandated systems that you are obliged to undertake in order to keep your business compliant are addressed.

- **Other Methods for Prioritising Your Systems**

There are other reasons for prioritising particular systems to combine with this initial method of prioritisation. These considerations also highlight new systems you may need:

- **To avoid recurring interruptions and firefighting**

Using a football analogy, as the business leader, you are the attacker. Your managers make up your midfield players and your other team members are your defenders.

You need systems which enable each of your players to maintain their position. Anything that you are interrupted about which should be the domain of your managers, or your managers are interrupted with which should be managed by your defenders, should be systemised in order to stop the unnecessary loss of leadership/management time.

Consider how you spent your time over the last week. Encourage your managers to do the same. Prioritise systems to deal with any recurring interruptions or time spent firefighting.

- **To delegate tasks others can complete with system guidance**

Chances are, there are tasks which you are currently undertaking that others can carry out for you with the right system guidance. Systems which will enable you to spend more time leading your team, working ON your business or away from your business.

- **To eliminate recurring problems**

Systems help you eliminate the stress and cost of recurring problems in your business. For example, you may need to prioritise systems which improve the management of your cashflow and finances, should these need to be more robust.

- **To capture and replicate business successes**

Written a successful proposal? Converted a new client? Prioritise recording the actions you took, to create a system to be used again.

- **To capture current systems**

New team member starting? No recorded induction system to follow? Create one which you can use now and as required in the future.
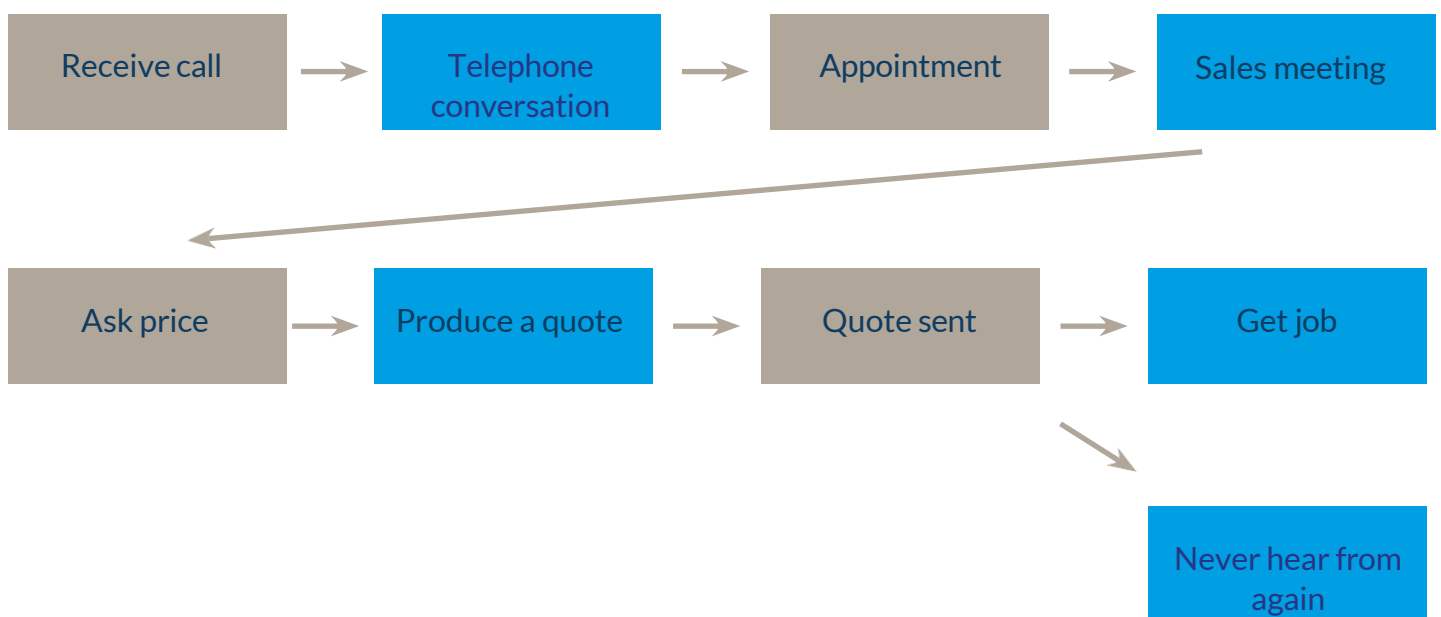
Step 2: Map Your Business Systems

- **System Mapping**

Systems mapping is best done visually as this allows you to analyse the workflow.

You can use a sheet of paper, whiteboard or post it notes to map the steps in your system. Post it notes can be particularly useful for this as they allow you to move steps around when analysing the system.

Here is an example of a mapped basic lead conversion system:

Receive call	→	Telephone conversation	→	Appointment	→	Sales meeting

Ask price	→	Produce a quote	→	Quote sent	→	Get job

Never hear from again

Step 3: Analyse Your Business Systems

Once you have mapped your existing or new proposed system, analyse your visual illustration in order to:

1. Identify any waste and/or repetition

2. Highlight inefficiencies, risks to your business and opportunities for improvement, and

3. Assess the impact of the system at each stage on your customer

Step 4: Document Your Business Systems

Document your system as a step-by-step process, including:

• A description of the system objective
• Links to any template letters, checklists, forms, scripts, videos, agendas etc. involved
• The names of the role(s) with responsibility for carrying out the system

Step 5: Implement Your Business Systems

Here are the actions involved with successfully implementing business systems:

- **Add the system – make it accessible**

Your documented systems should be easy to access for your team.

The use of software to record and house your systems is recommended.

We use and recommend the [Sweet Process software](#) because it is simple to get to grips with and use on an ongoing basis, which makes it easy for your team to adopt.

- **Notify and train your team**

Once a documented system is accessible, the relevant team members should be made aware and provided with the relevant training.

- **Get feedback**

Agree a process for providing feedback on systems with your team.

- **Add to your team member induction process**

This includes giving access to all systems to be followed by the new recruit and discussing and confirming the systems culture in the business.

- **Consistent monitoring and review of systems**

Implemented systems should also be monitored by your managers and the regular review of your business systems should be included in your leadership systems, in the pursuit of continuous business improvement.

The best way to keep your documented systems up to date is for your team to use them all the time, every time.

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