

The smartest way to **GROW** your business...

Systemise, document
and delegate successfully



Prue Keen

Systems2Grow.com



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delegate successfully



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Content

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Smarter procedures to leverage growth
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Welcome

The question

Why do I need good, usable operations and procedures to promote business growth?

The question

We've tried and my documents just don't work

The question

Where do I start - it's just so overwhelming?

The question

How do I document tasks so my staff and/or franchisees will use my operations system?

The question

How can you help?

What others say

The next step

Welcome

**I believe every great business deserves to
achieve its full potential and enjoy
extraordinary growth**

We help business focus and clarify their business structure to meet their goals.

And then produce smart operational procedures, so staff know what to do without constant input from you.

Experience tells us by taking this action...

- You increase business turnover, profit and asset value
- And you're able to move out of the day to day to work on (not in) the business gaining time to manage growth into the future

Even better, you gain more time for family and fun.

We have been working with businesses for over 35 years, helping each move from stalled to take-off.

And we know you, like our other clients, will love the outcome.

Before you get there though, you might like to explore some of the more common questions we often receive from business owners thinking about systemising and producing smart procedures to help manage their staff performance and business.

So, we have put together this booklet to run through some of the more frequent questions we hear.

The question

Why do I need good, usable operations and procedures to promote business growth?

The Case Study

The first steps rationalizing my business showed I should focus on the strata cleaning market.

I found that in Perth we had 56,000 potential clients and 2000 more were added to this number each year. Then, if each year, we only had contact with 20,000 of those clients and only converted 1% of them, we would gain 200 clients for our own business and turnover an additional \$6m a year.

And by adding operations so staff had systems to follow, we turned from disorganised to amazing with a turnover to match – up by 49% in the first six months

Shannon Daniels
Triumphant Property Services

The question explained

Over the years, so many have said to me...

'If I have an idea, do good work, and offer a good product at a fair price, people will find me, and my business will be successful, whatever the size.'

The question answered

My answer...

'Maybe and maybe not'. There are many aspects behind what makes a business expand and getting the right product in place is just the first component.

Business growth follows a pattern

Way back in the early 80's, Harvard researchers Churchill and Lewis, found there was a significant pattern behind the growth of every business.

They found every business, however big or small and however well-funded or resourced with knowledgeable staff had to go through five distinct phases to achieve business growth.

They also found each stage is associated with learning to manage a specific business tool.

Yes, even Richard Branson's successful startups will go through each of these stages, all be it faster than most because each of his startups are well resourced with skilled staff and adequate funds. Even so, Branson's team will decide to abort those which don't make it, keeping only businesses which have what it takes to grow to maturity and remain successful in the long term.

The five stages are discussed over the page

1. Existence

Every startup begins at Existence. The focus at this point is to find out if there is a market or not. The organisation is simple, and the business owner does everything, worrying about getting more customers, managing stretched capital funding and the few staff or contractors on board. The aim is to stay alive and move to a point where the business brings in enough customers to cover expenses.

Marketing is the key tool to learn.

2. Survival

The business is now a proven, workable business entity with a customer base. You know your customers and you have developed your brand entity. So, your management focus moves to looking after money. Will there be enough to break even and generate a cashflow to stay in business and grow?

Operational business size is still modest, and owners are often hands on, closely supervising staff and operations to make sure things are done their way and brand integrity is protected.

Money management is the key tool to learn.

3. Success

By now, the company is stable and profitable. Some management staff come on board and basic financial, marketing, and some undocumented, production systems are in place. Usually in the owner's head!

Business owners still control the day to day and many decide to stay at this stage because it funds their lifestyle and they do not wish to let go.

Business planning is the key tool to learn.

4. Takeoff

But many business owners are looking to expand. If so, key issues are usually around how to make that growth happen and how to manage the finances needed to control it without losing control of the brand.

Making growth happen

The Harvard team found that to enable growth, the number of staff will have to increase beyond a size where one person or small team can manage everyone involved. We know this expansion usually involves the duplication of the sales and delivery functions.

So, it becomes essential tasks can be delegated consistently so other people can do them the same way, your way, every time without your input. The only way you can make this happen is to put in good usable documented operational systems, so everyone knows what to do.

Systemised operational procedures are the key tool for managing the delegation needed for growth at this point.

5. Maturity

If business leaders and their teams do understand the need to be organised and manage successful delegation, the company will arrive and have the advantages of size, financial resources, and managerial talent. Provided it can preserve some entrepreneurial spirit and flexibility, the business will become a formidable force in the market.

The principle

If you want to grow your business beyond a ceiling where you and a small team can oversee everything and keep brand integrity, you need to be able to delegate important tasks responsibly.

You must step out of the day to day and, replace the need for your constant input with good, documented procedures people will use.

The question

I've tried but no one uses my documented systems

The Case Study

We put in our operations and insist our staff use them. My first question when they come to me is – ‘Have you checked the system?’

The result is astounding. Staff use our operations manuals.

We would never have been able to run and expand our business through COVID without these operations and our leadership.

The ability to change the rules fast to reflect the different States requirements has meant we could stay safe and look after our customers throughout Australia. Today we can even remotely open and set up new outlets and train staff using the operations and training in our software.

Lisa Hellwege
Earworx

The question explained

Over the years, so many business owners and franchisors have commented to me that they just cannot get their franchisees or staff to use the operations manuals they are legally required to produce. The bit I found shocking is that even some of the biggest franchises in Australia have this problem. What isn't surprising is that these are the groups who seem to have the most problems.

Admittedly, in my early days these documents were paper-based and difficult to keep up to date. It was also time consuming and clumsy for staff to find anything meaningful – so they didn't try. But the problem still exists today in businesses with comparatively sophisticated operations systems.

The question answered

However, there are businesses and franchise groups across the world which do have great operations systems in place. The best could not have achieved what they do without easy-to-use, relevant procedures to manage the way important tasks are completed.

These are the rules successful businesses follow.

Make your operations easy to access

Today, your operations manuals must be cloud-based. No one is going to the back office to look for the dusty paper manual hidden on a bookshelf. This especially applies to service-based businesses such as a gutter maintenance company owned by one of our clients. When his teams need to be reminded how to put tricky gutter parts together, they will not be happy having to climb off the roof to access the information on a computer or document in their vehicle.

So, even if you do put your operations into the cloud, use a system which is easy to use, and each procedure can be found on a phone within a couple of clicks.

And use a system which has everything integrated.

Procedures need attached downloadable documents and to be supported by images and video where relevant. Not possible with most systems around.

Keep each task description short, relevant, and as simple as possible

Operations manuals can become complex and unwieldy at the drop of a hat. It is so easy to think that everything must be covered.

The truth is keeping the manual as simple as possible is important. Only cover issues which are essential and relevant to getting key tasks done your way.

An example comes to mind. We were checking out a manual prepared for an ice cream shop. Obviously, cleanliness is important, and it is essential that the floors are mopped at the end of service each day. But you probably don't have to specify that the mop is to be swished side to side rather than backwards and forwards – does it make a difference?

Think about it though, because sometimes it is the little things which set you apart from your competition and those things need to be recorded.

Base your training on your operations systems

Your operations systems must become the hub around which almost all your staff and franchisee management will revolve. So, get your core procedures prepared first.

Then don't repeat your operations in your training processes. Training processes will use your operations and just cover how you train people.

For instance, a training process may involve:

- Going through relevant procedures in the operations manual
- Second, attend head office for a role play exercise

- Then, complete tasks under supervision
- And finally, using relevant procedures on the job when they need reminding about the correct process

Answer questions with a question

When someone calls you to ask how to do something – you only have one response.

'Have you checked the system?'

The beauty is – if the answer is, 'Yes' —Something needs updating.

Follow up

The best way to keep everyone realizing how important it is to do tasks your way and follow documented procedures is to base performance management on your operations.

Training is an ongoing process. Things change. People forget. Timely reminders help the message that you think your processes are important. You want tasks done your way – not theirs.

Keep your procedures up to date

Finally, remember, the fastest way to lose people is to let your operations manuals go out of date.

Maintenance is an ongoing task and you do need to employ someone capable to be responsible for keeping them relevant.

The principle

Become the leader they need

Your cloud-based operations must be relevant, intuitive to use, simple to understand and available at the click of a button so make sure it is.

As the leader in your business, get everyone to use your systems and always let them know how important it is for things to be *'done our way'* – in line with the brand and in accordance with your ops.

The question

Where do I start? It's just so overwhelming...

The Case Study

We were working with a small retail chain, putting in systems to manage the way the stores operated. The client decided to use contractors to do the job which is great. Engaging experienced contractors is a good way to go for the first stages of building a system like this.

However, initially the project slowed when the contractors could not contact staff on the job to get the information needed about how tasks were to be documented.

Once a management team was put in place with clear management tools and processes to make sure the documented systems could be captured and reviewed to ensure relevance, the process took off.

Today, these operations are a succinct multimedia system which meet the needs of different people and different processes through this complex organisation

The question explained

Having worked in this area for many years, I have so often been told – ‘I just don’t know where to start!’

So...

- *‘Either procrastination takes over and I don’t do anything at all*
- *‘Or I just put things down as they came into my head and it’s a mess — none of us can find anything.’*

The question answered

Start with your business

Business is about people. Especially today, in the age of better relationships, and the most important people of all, your customers, so structure your business around them.

First, identify the product they really want and present it to wow them into choosing your service.

Second, check your business structure to make sure you are giving your money-paying customers just that – a wow service.

Third, drop everything else. So many of us add things as the next bright and shiny object takes our fancy, and so many of those shiny things take away focus but don’t bring in the money. Simplify and focus your business on what your customer wants — be customer centric! .

Fourth, make sure people you bring in to look after your clients (sales, service and delivery) will relate to your customer and have the skills to do the job, making them happy along the way.

Finally, fifth, structure your business around supporting your sales and delivery staff so they can focus on the most important job – bringing in the money.

Identify what's important

Once you're completely clear on the focus of the business, it's time to identify what's important.

The focus is still your customer and what is important to them, and what's important for you to do your way every time.

Most businesses I work with have a priority list something like this.

- How to attract customers
- How to communicate with customers, both before you make the sale and through delivery of the job.
- How to make and/or deliver the product.
- Your standards of service
- How money is managed.

The list goes on...

Give someone else the job and a team to help them get the work done

Once you have that list, it's time to get the procedures written and there is one thing to remember – you as business owner are the worst person to do this task.

But you do need to manage it, making sure the job is done right – your way. Your operations must ensure your staff know how to do their tasks in a way which protects your brand integrity.

So, your first action is to give the task to someone in your organisation. Someone who can see the big picture of what your operations systems will look like and manage the detail of documentation. Experience tells me it can be tricky to find the right person to do this job.

Then give that person the support to get the job done - well. That way you'll win.

Put a management system in place so the team works as one

Finally, put a management system in place so you can oversee the work done by the team and make sure they get it done right.

The principle

Put a system in place to create your operations systems under your management.

Be very clear about what your business does.

Then get someone with time, enthusiasm, and ability to document your procedures with the help of your team, under your management.

The question

How do I document tasks so my staff and franchisees will use my operations systems?

The Case Study

Some years ago, we worked with a remedial massage business which specialised in geriatric care. The first tasks they completed with us were to restructure their business and put operations in place for the tasks they specifically needed to delegate consistently. This worked. They grew their business 256% within the first six months and continued to grow strongly over the next few years.

As the business expanded though, the operations originally documented needed to expand to take into account a much more sophisticated business structure and our clients suddenly found the job of updating was much more complex than they anticipated. So they brought in the experts to help them reorganise the flow and add new sections where appropriate.

The point - start with what is important now to get your business operating smoothly and don't get sidetracked with unnecessary detail until the detail becomes important for further expansion in the future. Then put a team together under your management to get the job done professionally.

The question explained

I have seen so many operations systems which are not easy to follow or understand.

The result is staff and franchisees just don't use them as a first point of call when they are not sure what to do and often, they just make it up – meaning you lose consistency and brand integrity in the way your business is run.

The question answered

It's a bit like building a house – start with a plan, build the foundations, then make sure everything connects in a way that makes sense.

Set up your operations systems team and get them together to work out what's important.

The first step is to write a list of the main headings for groups of tasks it will be important for your staff and franchisees to do your way.

Then, where you are aware, note the important subheadings.

Even at this early stage, you will notice that some tasks listed in the subheadings will involve issues that come up again and again in other areas. Tasks involving safety, IT, cleaning, managing staff, communication styles all come to mind here.

To avoid duplications and resulting confusion and difficulty with ongoing maintenance, the key to documenting any operations system is – **there must only ever be one point of truth.**

You will find your first groupings will need to change. This is where the overwhelm can kick in – so take a breath and make a first cut at placing tasks into groups you think will make sense, even if sequential tasks seem to need to sit in different areas.

The beauty of using a software platform is you can link the outliers, creating a beautiful web of information which will become intuitive

and easy for everyone to use.

This plan will be your starting point but be aware you will need to be flexible as you start to document your processes and be open to changing your groups at least once.

Prioritise – you can't do everything at once

Even with a team and a plan you can't cover everything at once. Start at the beginning – focus on what's important and don't be distracted by irrelevant detail. As noted elsewhere, the important tasks for keeping your product or service on brand probably sit with sales and delivery and very much involve your customer. So, start with those parts. Background administration probably doesn't matter so much at first unless you want some administration tasks to be done consistently to fit with what you are asking your sales and delivery teams to do.

People are different

We none of us absorb information in the same way.

Today video is king but many of us still absorb information better through text. And audio is useful for listening to on the drive to work.

Different media are also useful for capturing tasks. Again, video is perfect for capturing how to do physical tasks and useful then for giving your documenters something to record more succinctly what is to be done. But still images also work. So, think multimedia and choose what is going to work for most purposes.

And there are different purposes your operations need to fulfill

In any business, operations systems are used for at least three purposes.

- Training
- Reminders on the job

- Performance management

Video is great for training, especially for the first exposure on how to get a task done. But it really is not so great when someone wants to know which is the next click when adding a customer to a website – text and still images work better here.

So, where relevant, keep thinking multimedia and record your tasks so they will be fit for purpose – all purposes.

But not that different

But people are not that different. The foundation of any operations system must be a logical flow and simplicity and clarity of instruction.

A little challenging when you are building the web which must make immediate sense to those using it.

Create a hub

And finally, remember – you are also creating an operations hub. Business today is digital, and we all use a range of apps for accounting, customer relationship management, marketing and more.

The rule of one point of truth means you will not replicate instruction or tools provided by your apps. But you will document instructions important to you on the way they are to be used and then link to the app itself for use and where the app holds a good help center.

The BIG win is the way your operations system will form a hub linking all your apps together in one operations system.

The principle

Create a plan.

Work out what's important to you, the learning styles of your staff and create a plan.

Then start at the top with the highest priority to create an operations hub to manage your business.

The question

How can we help?

The Systems2Grow Systems Success Path



The Systems2Grow Systems Success Path explained

Our operations systems have been structured for staff to succeed—that's important because it's your staff who are responsible for bringing in the money. Busy staff need to be able to absorb necessary information as fast as possible.

The Systems2Grow operations system is:

- Clear & focused
- Organised so the answer is quickly apparent

Free from jargon & journalese. It doesn't matter who you are, what you do or where your business journey is at, there are three core steps you must progressively work through to build successful systems for any business.

Solid Groundwork

We review your business through our Optimal Business or Franchise Structure Workshop to make sure it is focused and optimised to bring in the money. We also check out the personalities most suitable for interacting with your customer and what this means for your administration sections and the support they need to provide to optimise sales and delivery functions.

Successful Systems

We show you how to plan, document and maintain your systems so they are simple, intuitive, easy to use and make sense. We have processes and tools to make this job easier and make sense.

Savvy Staff

However good your operations system, it will never work unless you take a strong leadership position and ensure it is used for training, on the job reminders and performance management. We show you how to have staff savvy in your way of running your business so they do things your way every time.

A little about us



Prue Keen

"I am an experienced writer with a deep understanding of business and legal processes

With over 30 years' skill in the creation of reports, instruction manuals, books and dealing with complex planning and environmental issues for government and running my own successful businesses, I can take complex topics and make them easy for a wide audience to read and understand."

Brian Keen

"I'm passionate about helping people become financially secure and independently wealthy by setting up their own business, wherever they are, whatever their background.

Having worked in the franchise sector for over 30 years and helped business grow by over \$9bn in that time, I know the initial steps of reorganising and systemising results in massive growth.

I know these early steps can help you...

- Expand your business
- Increase its value and saleability
- average yourself out of the day-to-day, work on your business and live your life
- Give you pride in what you can achieve

I've helped many dozens of businesses expand successfully, increasing their profits and allowing their owners to work less."

What others say

Fitclub Boxing

Even though we have been operating for 13 years all our systems were everywhere. The software and Prue's way of putting the operations together means we now have easy to use systems our staff love.

Annie Prestwidge
Fitclub Boxing Studio

Golf Ladies First

Being a professional golfer, I have an eye for detail, and I really appreciated the care with which Brian and Prue took us through the steps to structure and systemise our business and get the basics functioning. Documenting the operations really made us think about why we do things and made us add some needed changes.

Gordon McCullum
Golf Ladies First

A Clean Move

Having the systems done for us was the best decision. We really didn't know where to start. We had to become involved in the process to explain how we ran our business, so we learned along the way. The simple, logical systems we now have are easy for us to maintain and easy for our staff to use.

Damien Kimber
A Clean Move Group

Blast Entertainment

It was worth all the effort to get the operations for the business documented in such easy software. I now can train my staff easily and don't have to field questions all day because they just check into the app to get the answers.

Ben Grew
Blast Entertainment

Next steps



I sincerely hope, by now, you feel much more comfortable about systemising your business.

If you've read this booklet, then I know you've been thinking about how to manage business growth and the need to put in operations systems but perhaps have some questions and reservations.

I hope you are now much wiser about the need to put in usable operations systems, and you are encouraged and ready to take your business to the next level.

If you'd like to have a chat about your developing your business procedures, please contact me on...

prue@systems2grow.com

Or call 1300 960 136.

Good luck to you and please keep me updated on your success!.

Having worked with franchised businesses for many years, Brian and I have helped many owners grow business by duplicating their sales and delivery departments to increase turnover.

We know this method of business growth applies to all businesses, franchised or not, but there are some essential tools to making it work.

The secrets are to focus the business on what customers want and simplify it, then create good, simple operations manuals which are easy to access and attractive for staff and/or franchisees to use.

Tasks can then be delegated without staff needing close follow up or supervision.

We know you cannot grow a business beyond a certain ceiling without effective operations manuals which enable you to delegate responsibly in this way.

We also know it's tricky though, and so many people have told us they have tried, but staff will not use their operations, making effective delegation difficult.

This booklet outlines some of the principles we, at Systems2Grow, know are essential for putting in place usable operations manuals to help manage delegation and your business growth.

**For a complimentary Systems2Grow consultation, visit
Systems2Grow.com or ring 1300 960 136**

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