

CREATE SYSTEMS THAT WORK FOR YOU AND YOUR BUSINESS

Think about your day to day business (or individual) operations and make a list of five problem areas or painpoints.

- 1. _____
- 2. _____
- 3. _____
- 4. _____
- 5. _____

For one of the items above write out the problem you would like to solve.

Ex. Invoicing my clients takes too much time, I can never get them out on time, and no one else knows how to do it.

What is your ideal outcome? This becomes your end goal.

Ex. A simplified process that I can delegate the task to others.

What tools are needed to perform this task?

**Who contributes or will contribute to this task?
And what will be their role/responsibility?**

Person:

Role/Responsibility:

What are the steps to accomplish this task?

Use sequential order as much as possible.

Steps to Refine and Implement the Process

- Document the Process:** Create a document, spreadsheet or chart with all of the steps to your process.
- Perform the Process as documented:** Follow the steps as you have documented them. Make note of any steps or details that may have been missed.
- Revise your Documentation:** Add in any steps that you identified by performing the process above.
- Introduce and Delegate:** Go over the process with those who will contribute or execute the process.