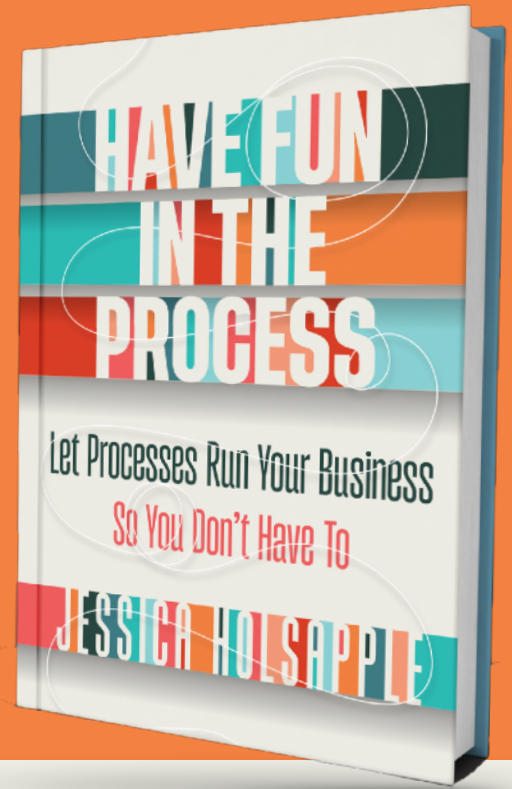


A 90-DAY GUIDE
A companion for the book

Enjoy more freedom & fun running your business

A simple guide to improve & document your business processes. And to manage it for the long-term.



Everyone on
the same page



Everyone knowing
what to do



Everyone improving
the business

Ever feel like the business is running you?

It's all too common. Thrown into the job with too little training. Too many inefficient & undocumented processes. Too many communication channels. And too many misunderstandings across the organization.

Breathe. This guide will help.

Step-by-step
guide to improve your
processes

A set of worksheets
to build
your processes

Know how to
implement these processes
—in 90 days

How to use this guide



Read & follow
the steps



Download & complete
the worksheets



Build, run & improve a
better process

1

Buy-in to the process

Week zero

The leadership team prepares via this 3-step process:

Decide & commit

Get buy-in by top-level leadership to...

- ✓ **Determine top leader** to own the project...
- ✓ **Ensure the project** gets completed by next quarter...
- ✓ **Sign off** on this project

Define your purpose

Write the purpose statement to...

- ✓ **Clearly define** the why of this project
- ✓ **Make it known** to everyone
- ✓ **Add it** to the project plan

An example: *“A plan to grow the business, serve clients better & help the team perform at its best.”*

Share the purpose

Share this initiative (and purpose statement) with the team at the next quarterly team meeting:

- ✓ Everyone knowing **about this plan**
- ✓ Everyone knowing **this is a priority**
- ✓ Everyone knowing **why this will help the organization**



Download & complete the worksheets

Download the following documents to achieve the steps above:

[Project plan](#) · [Working Groups](#) · [Working Group Agenda](#)

2

Build the process

Follow the steps below to map, document & create common understanding for new processes.

Map the process

Weeks 1, 3 & 5

Discuss, agree on, & define the process:

- ✓ **Working groups to meet** 90-120 minutes (typically) to map processes
- ✓ **Appoint facilitator** for each meeting
- ✓ **Appoint scribe** to map & document process steps
- ✓ **Create reference document** to outline high-level steps of the process

Notes

- **Map processes how you like...** using tools, board, flip-chart or document. Evolve it over time
- **Document the highest level steps**, from start-to-finish—with last step leading to next process
- **Scribe to capture topics** to be resolved in the future, along with ideas from the group
- **Scribe to finalize document** & send to process owner before testing (see next section)

Test the process

Weeks 2, 4 & 6

This phase ensures the documented process works as intended -or- to alter the process if needed.

- ✓ **Perform the process** according to the document (3 times, ideally)
- ✓ **Note differences** between what was performed—against documented
- ✓ **Note any missing** or incorrect steps in the document
- ✓ **Share findings** in next working group meeting
- ✓ **Make any edits** to the process document
- ✓ **Repeat above steps** until testing is complete

Sign-off on the process

Week 7

The process owner signs off to...

- ✓ **Confirm testing** has been completed
- ✓ **Documentation is complete** & accurate
- ✓ **The team responsible** for executing—has approved the plan

Train around the process

Weeks 8 to 11

Everything now in place for everyone to be trained according to the documented process:

- ✓ **Each process owner** conducts training & gets employee signatures
- ✓ **Continue training** as scheduled, or...
- ✓ **Until all employees** have completed & signed off on training

Wrap up the project

Week 12

A full team debrief, via meeting, survey or forms to collect feedback to...

- ✓ **Identify key things** learned
- ✓ **Determine *how to do better*** for future initiatives
- ✓ **Celebrate wins**
- ✓ **Know what's *coming next***, including kick-off for next phase

3

Run the process

Document, test, train & agreement to follow the process... all worthy achievements. Now, it's time to let the process run the business.

Kickoff

Communicate to the team how to...

- ✓ **Use the process document** to manage the business
- ✓ **Make updates** to the process over time & learnings
- ✓ **Perform sign-offs** for updates

Daily

Accountability, recognition & empowerment for your people—all held to the same standards:

- ✓ Assist team to be **accountable** for process, metrics & outcomes
- ✓ Provide **recognition** to performers who optimize work
- ✓ **Empower** teams to solve issues by following the process

Weekly

Keep learning from last week to improve how to do better this week:

- ✓ **Publicly recognize** key performers for successes the prior week
- ✓ **Share learnings**, track & communicate metrics & outcomes
- ✓ **Repeat methods** for capturing ideas & improvements—& how you resolved issues

Remind the team to **follow the process** as often as needed. And **highlight stories** around collaboration, resolving issues & other positive outcomes.

Monthly

- ✓ **Track & share results**—measuring data, not opinions
- ✓ **Dedicate time** to solve issues, filter ideas & improve processes
- ✓ **Ensure new changes** get communicated, tracked, retrained & signed off

Quarterly

- ✓ **Conduct performance reviews** for each team member
- ✓ **Identify deliverables** where others may need help & why this might be occurring

- ✓ **Recognize consistent performers** at companywide meetings, newsletters & other channels
- ✓ **Update LMS** to capture info around retraining, retesting, metrics & outcomes
- ✓ **Process owner to report performance** for improving the business to leadership team *

** **FOR REPORTING:** How many employees have been trained · Percentage of teams yet to be trained · Metrics showing how the business has improved · Key learnings of interest to top leaders*

Annually

- ✓ **Show improved employee performance** using data from quarterly reviews & coaching
- ✓ **Develop plan** for how employees can excel during the upcoming year
- ✓ **Prepare for annual meeting** so executive team is ready to help solve process issues

Others

- ✓ **Onboard, train, test & receive sign-off** for new hires
- ✓ **Perform the above** for any employees promoted or that changed roles

Do better. Live better.

Yes, work is work. But when we systematically improve our processes, understanding & results—life improves too. For everyone involved—employees, managers, leaders, vendors & customers.

I hope this guide helps you sleep better, enjoy work more & have more freedom & fun with a repeatable process for you and your people.