



Better Business. Better Life.™

Developing Systems: *Get Organized, Get Systematized*

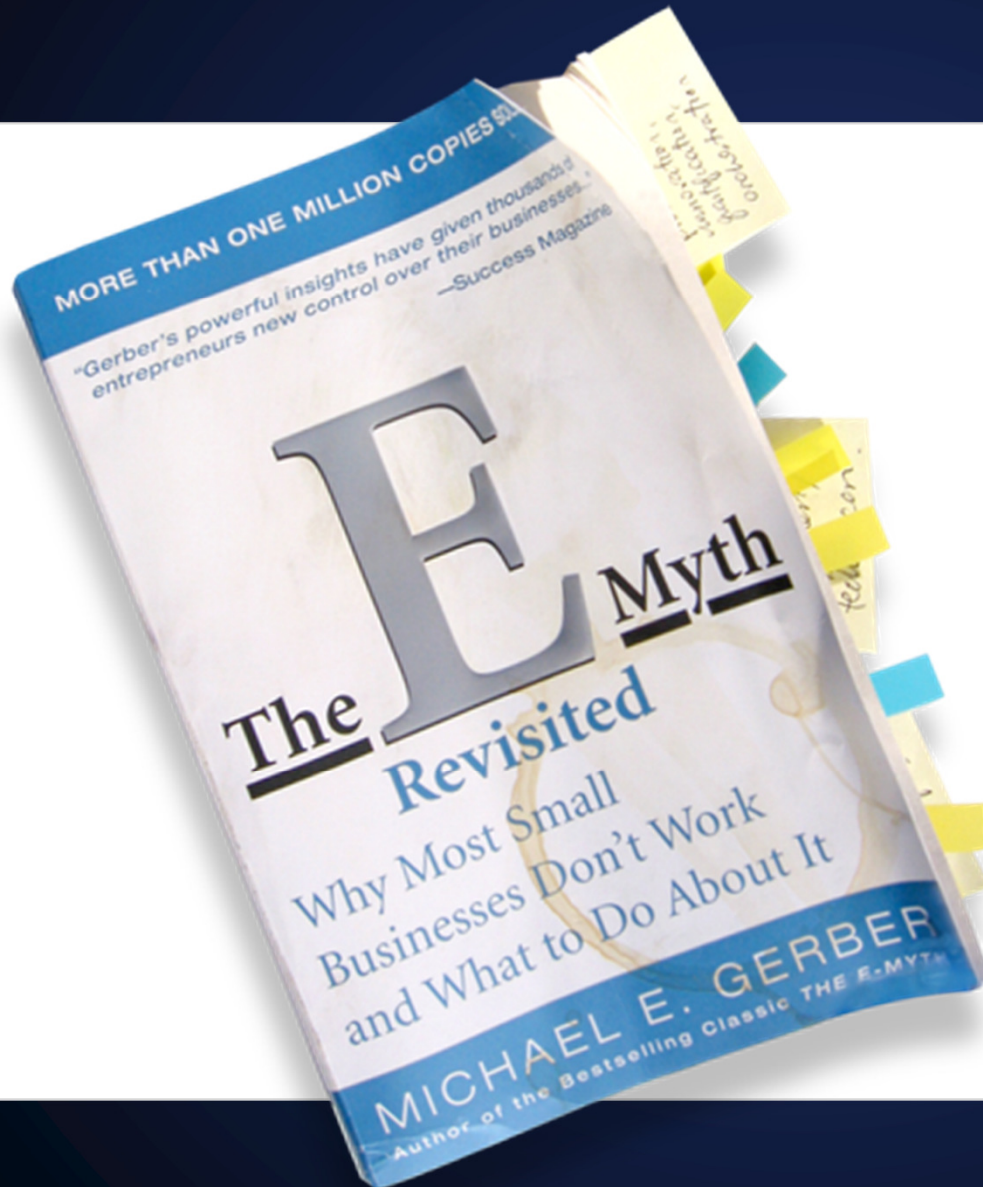
E-Myth Online Seminars



E-Myth Worldwide is the pioneer in business coaching and training, an icon for transformation since 1977. Drawing on the revolutionary principles of the best-selling book, *The E-Myth Revisited*, we provides a universal and comprehensive set of business tools and coaching services delivered via phone, web and events. We serve our clients by challenging the status quo and showing them how they can better manage and grow their business.

Our clients own their businesses.
We help them own their transformation.
E-Myth. Own it.

Systemization



**The Turn-key
Revolution**

**The Franchise
Prototype**

Why Systems?

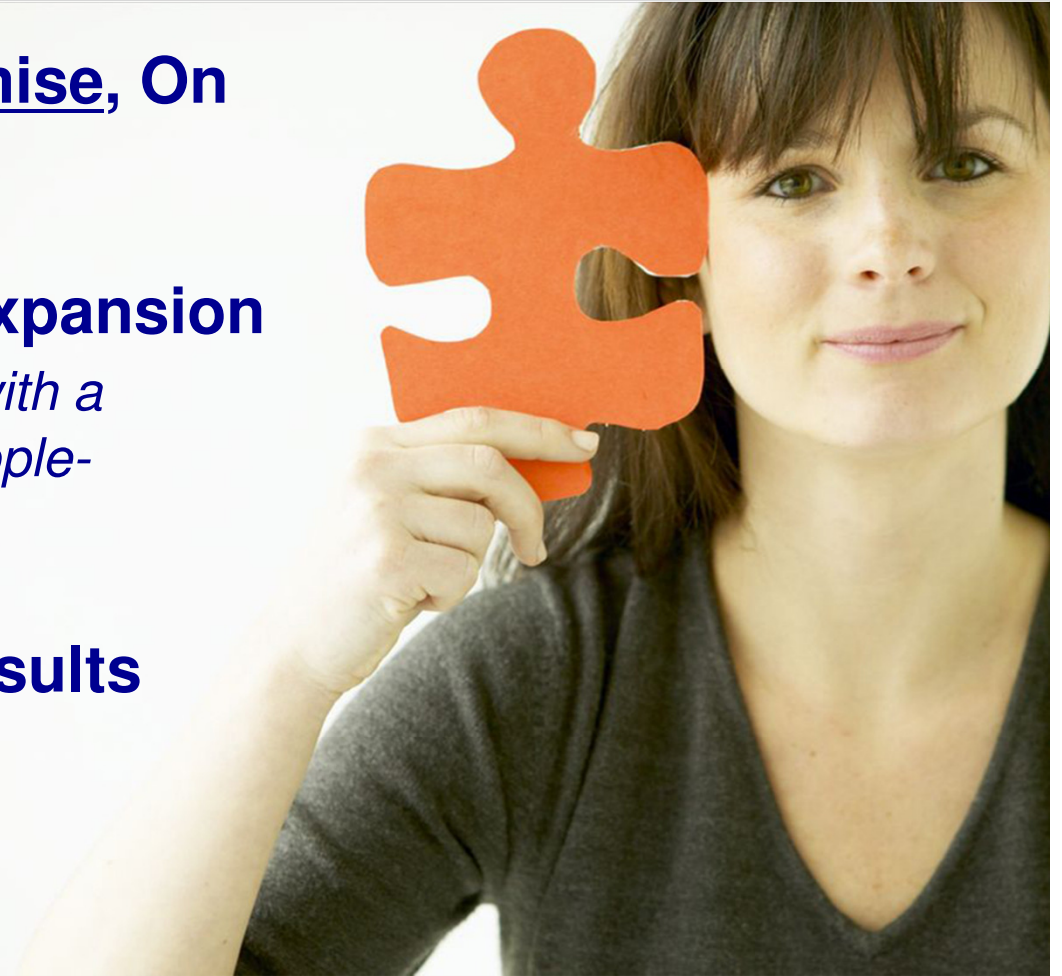


To create consistent and predictable results!



Why Systems?

- **Deliver Your Brand Promise, On Time, Every Time**
- **Company Growth and Expansion Without Chaos** *(Possible with a Systems-dependent, Not a People-dependent Business)*
- **Consistent Business Results Creates Company Value**
- **Drive Innovation**



Why Document?

- **If it's not written down, it doesn't exist.**
- **To create your company's "operations manual" is the definitive "*How We Do It Here*" guide.**
- **Supports training (especially cross-training)**

Companywide Involvement



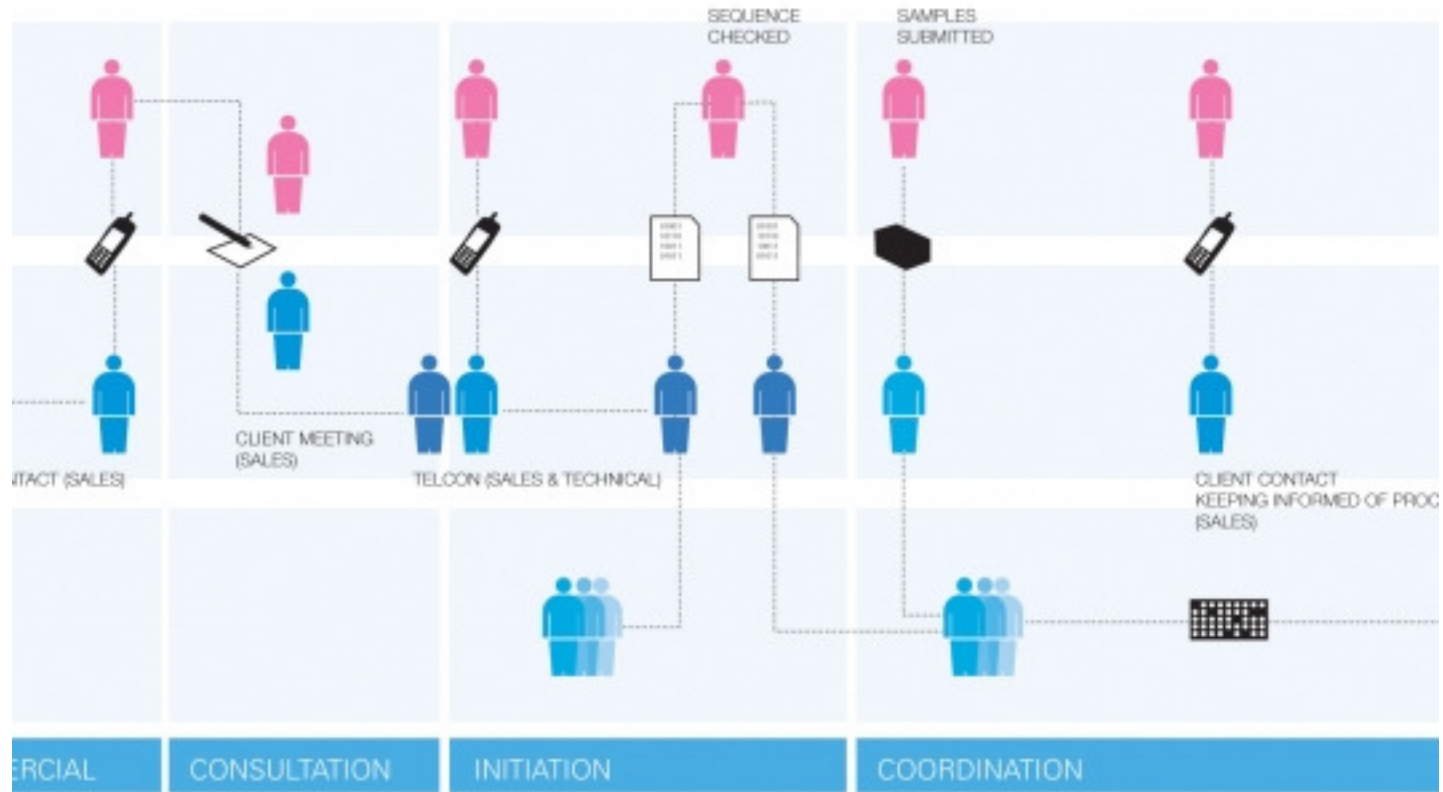
Systems documentation affects the entire company and should occur in all departments.

Getting Started Checklist

- ❑ **Create and Communicate Your Brand Promise**
- ❑ **Educate and Get Buy-In (Company-wide)**
- ❑ **Identify Your Systems**
 - *Take the Customer Journey*
 - *Functional Mapping*
 - *Position Specific*
- ❑ **Make a Systems Listing Tracker**
- ❑ **Establish Your Priorities**
 - *Customer Impact*
 - *Business Impact*
 - *Key Frustrations*
- ❑ **Get Organized**
 - *Establish a Standard Approach to Documentation*
 - *Assign Accountabilities*
 - *Conduct Training*



The Customer Journey



Graphic Source: www.servicedesigntools.org.

E-Myth's Business System Roadmap



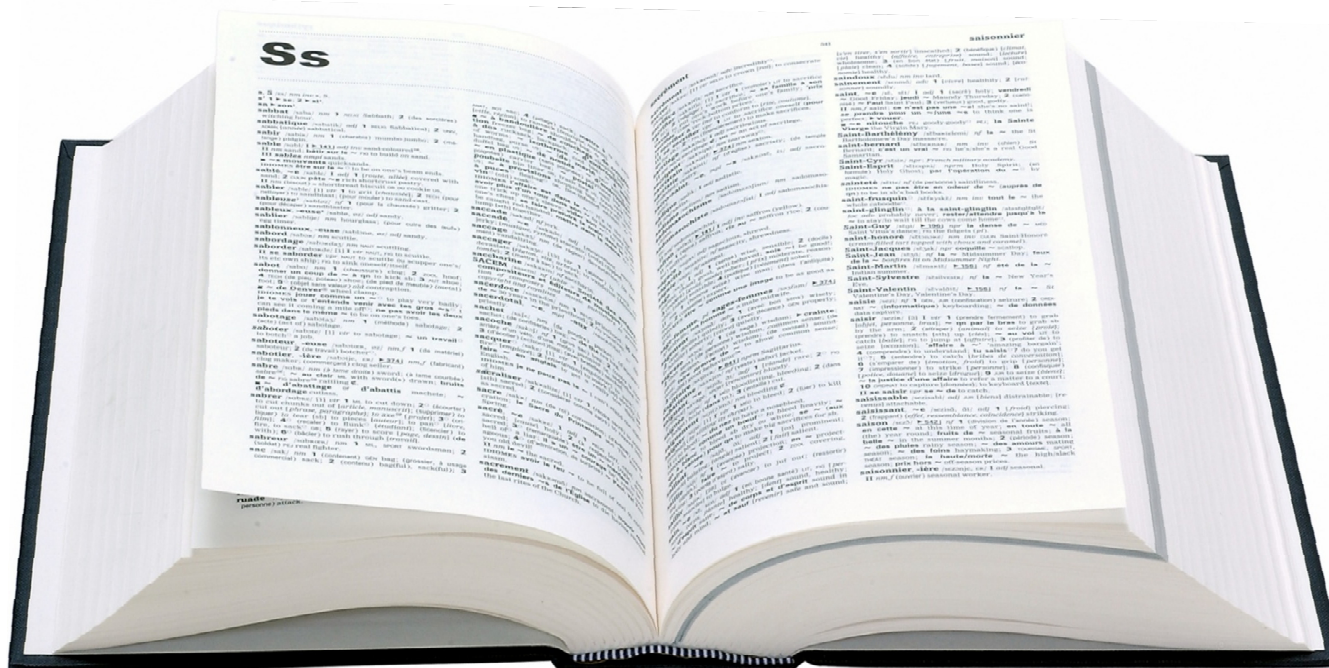
Seven Centers of Management Attention™



Money Center Systems



What is a “system”?

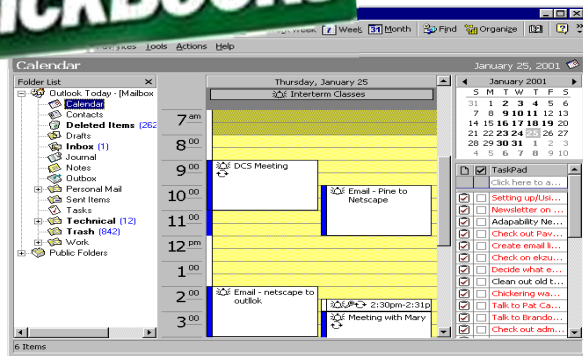
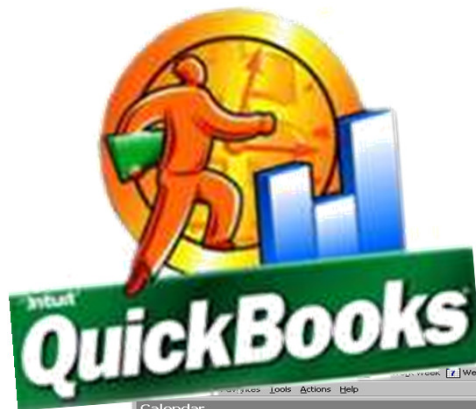


System: n. any formulated, regular, or special method or plan of procedure.

There are lots of systems around you



Off the Shelf Systems



Company Specific Systems

Home Blog Programs Special Offers Success Stories Resources Partners About My E-Myth

Welcome Caitlin Childs (Logout) E-Myth en Español Refer a Friend Contact Us Type Size: A A

Caitlin's Current Tasks

Title	Initial	Est
Reformat CEO Report	Reso	
Create index of all downloadable files in Compass and on the web site	Cent stora down files	
Materials ~ replace graphics in word docs with vector based graphics and enter coaching edits	E-My Grou	
Marketing Collateral for Private Seminar Sales	Semi Colla	
Private Virtual Seminars flyer	Semi Colla	

Time Off Request

Employee Name:

Date Submitted:

Number of Work Days Off:

Specific Dates of Work Days Off:

Date of Return to Work:

Paid

Unpaid (1st 90 days)

Check Type of Time Off

Personal Paid Time Off:

Jury Duty:

Bereavement Leave:

Other:

Comments: (other info)

Instructions for use of this form:

1. Fill in the appropriate field with info by clicking on that field.
2. Please check what type of time off you are requesting (if "other" state what type).
3. Once completed, email to your direct Manager for approval.
4. You're Done!!!

“Systems” in your Business

- Processes
- Routines
- Checklists
- Scripts
- Best Practices
- Policies
- Org. Chart
- Reports
- Meetings
- Training

Documentation Formats

- Action Plan Templates
- **Checklists**
- Flow Charts
- **Documents with Screen Shots**
- Pictures
- **Videos**
- Audio Recordings



A Simple Picture

- Step 11 →
- Step 10 →
- Step 9 →
- Step 8 →
- Step 7 →
- Step 6 →
- Step 5 →
- Step 4 →
- Step 3 →
- Step 2 →
- Step 1 →



Action Plan Template

Result Statement

--

Accountable Positions

Position with Overall Authority:

--

Participating Positions:

--

Sample Results Statements

System Name: Customer Shipping Checklist

System Result: To deliver superior service by insuring all product orders are complete, packed with care and delivered on time, every time which supports customer retention and loyalty.

System Name: Phone Greeting Script

System Result: To communicate how much we care and value each and every one of our customers and their business which drives retention and loyalty.

Action Plan Template

Resource Requirements

Staffing: Amount & types of manpower necessary to fulfill the intended result.

Space and Facilities: Type of space needed to fulfill the intended result, utilities, environmental factors, etc.

Equipment: Office equipment, machinery, vehicles, etc.

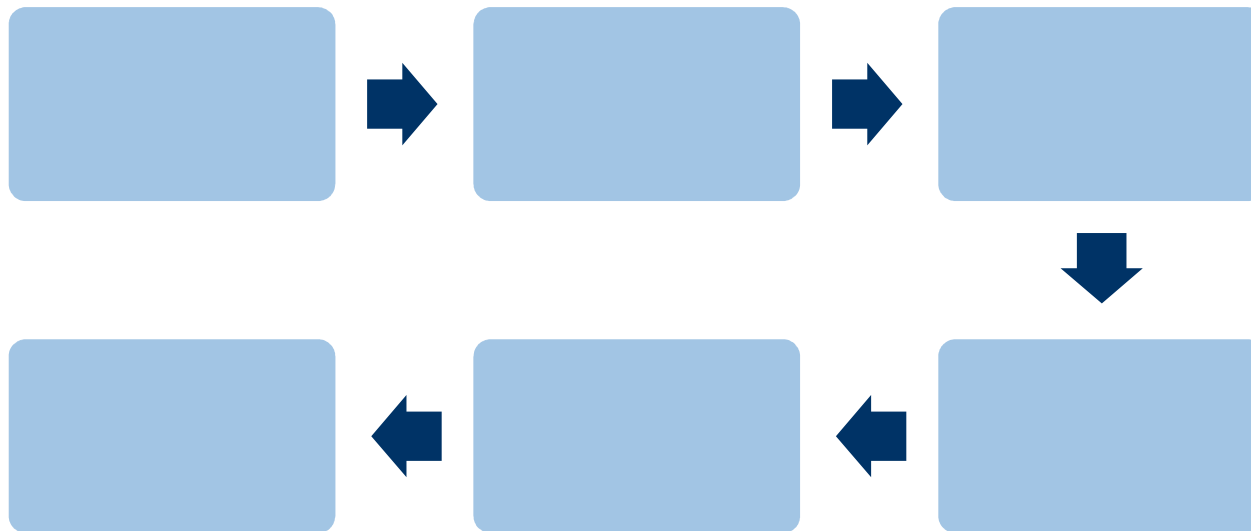
Supplies: Forms, office supplies, raw materials, components, etc.

Information: Reference materials, databases, pricing schedules, operating instructions, etc.

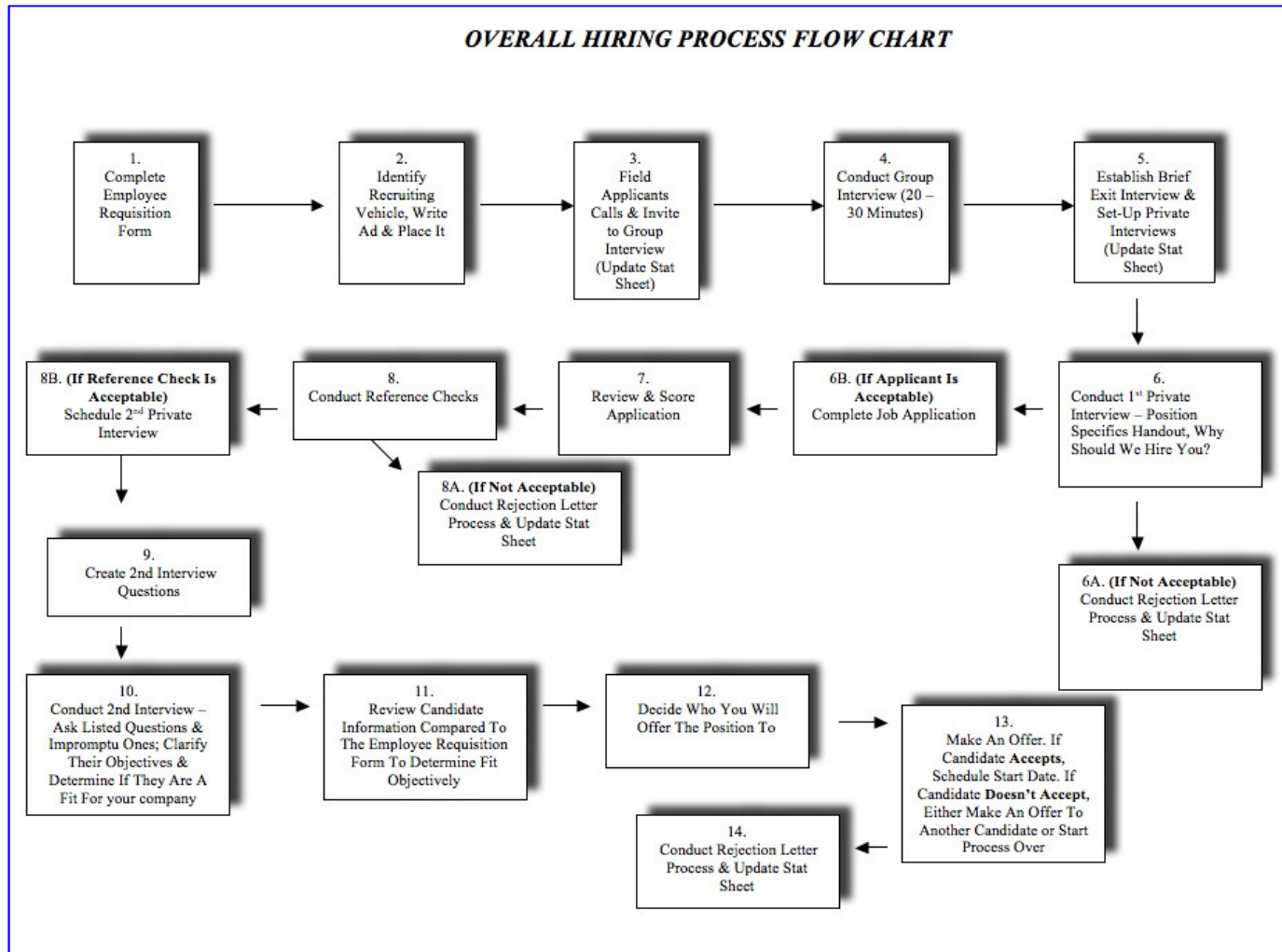
Action Plan Template

System Diagram

Identify the flow of work steps in the system and diagram them using boxes and arrows



Hiring Process



Action Plan Template

#	Benchmarks	Accountable Position	Timing

Benchmarks (aka “steps” or the actions) needed.

System Action Plan Template

Title/Code: **Post Workshop Client Follow-Up**



Description of System Benchmarks			
#	Benchmarks	Accountable Position	Timing
1.	Collect evaluations at workshop site.	Trainer	At the end of the workshop
2.	Fax evaluations to Client Services with final workshop and trainer scores.	Trainer	Immediately after workshop.
3.	Write Workshop Summary Report and submit to Sales Person.	Trainer	Within 1 business days of the workshop.
4.	Review evaluations and highlight key points and items to be aware of.	Client Services	Within 2 business days of the workshop.
5.	Send the evaluation summary sheet and the evaluations themselves to the Sales Person.	Client Services	Within 2 business days of the workshop.
6.	Review and complete Evaluation Summary Sheet, adding trainer feedback and key points for discussion.	Sales Manager	Within 3 business days of workshop.
7.	Place first call to client to review feedback, key points, and call to action.	Sales Manager	Within 4 business days of workshop.
8.	Email Evaluation Summary to client.	Sales Manager	Within 5 business days of workshop.
9.	File Evaluation Summary in client's "quarterly review" folder to prepare for that discussion.	Sales Manager	Within 5 business days of workshop.



Step 4.

Interview Checklist

Use this worksheet "as is" or modify it according to your business' needs to ensure that all interviewers have a consistent guideline for conducting hiring interviews.

- Choose interview team (if other staff members will participate).
- Reserve a quiet space for the interview.
- Review candidate's resume and the notes from the short interview and the follow-up phone call.
- Prepare an information packet about your company and the position for the candidate. (Include an application form if the candidate hasn't completed one yet.)
- Greet candidate and take him or her on a short tour of your facility. Offer beverage.
- Explain the purpose of the interview and describe your follow-up process.
- Give a brief overview of the position.
- Ask any questions you have about the candidate's resume and employment history.
- Ask the questions you've prepared about the candidate's experience, education, job skills, and personal qualities.
- Bring the interview to a close. Describe your process so that the candidate knows what to expect next.
- Ask if there are any remaining questions, thank the candidate, and escort him or her to the door.

Action Plan Template

Standards are requirements for performing the work and achieving a result.

- Quantity
- Quality
- Behavior

Systems/Standards
1.
2.
3.
4.
5.

System Action Plan

Title/Code: **Post Workshop Client Follow-Up**



System Standards

1. Sales calendars will be kept up to date with workshop date information and clearly identify when actions are required.
2. Trainers will use the “workshop debriefing format” to communicate focused information to sales director.
3. A live client conversation will be required for all evaluation results rated below 4.0 for either workshop or trainer.
4. Voicemails to clients communicating 4.0+ evaluation summaries will mirror participant comments in tone and will be less than two minutes in length.

Use additional sheets as needed

Action Plan Template

System Quantification

How will you **measure** the achieved result?

System Action Plan Template

Title/Code: **Post Workshop Client Follow-Up**




Resource Requirements	
Staffing	Trainers, Sales Managers, Client Services – enough staff in place for this level of business.
Space and Facilities	N/a
Equipment	Fax Machine needed at client site, most already have them, and we may need a portable scanner to be self-reliant.
Supplies	Process of creating evaluation summaries will need to be developed and streamlined so we can initiate evaluation summaries, and so the Sales Managers can quickly complete them with client-critical information.
Information	Participant comments must be in pen.



System Quantification	
Describe how you will quantify and evaluate the effectiveness of this system on an ongoing basis:	
Every 6 months, we will conduct client “quick surveys” to determine:	
<ul style="list-style-type: none"> A. Satisfaction with our company overall B. Frequency and value of communication C. “WOW” moments that are referencable 	
Annually we will review:	
<ul style="list-style-type: none"> A. Revenue B. Number of training events C. Number of training products offered D. Total # of participants trained 	

Coffee Making Action Plan



Action Plan

Title: Making Coffee
Result: To assure that there will always be a fresh cup of coffee.
Materials Needed: Coffee pot, coffee filter, ground coffee.
Position With Overall Accountability: All coffee-drinking E-Myth Worldwide employees.
Reporting Positions: None
Staff Positions: None

BENCHMARK	ACCOUNTABILITY	DUE BY
1 Gather necessary materials. Coffee filters and plastic storage containers of ground coffee are kept in the cupboard directly above the coffee machine. If a coffee container is empty, coffee can be replenished from appropriately-marked bags in the same cupboard.	All	As required
2 Grasp handle of coffee basket and slide it out of the machine. Empty used coffee filter (if applicable) into the trash.		
2a Place new coffee filter into basket.		
2b Using measuring cup taken from the top of the plastic coffee storage container, fill with coffee to black line or use 1 packet of pre-measured coffee.		
2c Fill filter/basket with measured coffee.		
2d Replace coffee basket in coffee machine.		
2d.1 Press the "Brew" button once, it may take a moment for the coffee to start brewing.		

STANDARDS

1	Every coffee drinker is responsible for making a new pot of decaffeinated or regular coffee when we find the coffee low. Coffee will be made when less than one inch of coffee is left in the pot.
2	Fresh coffee will be available until 4 P.M. daily.
3	Decaffeinated coffee will be made in the orange-rimmed coffee pot. The other types of coffee brewed will always match the label on the front of the pot.
4	Any mess created when making coffee will be immediately cleaned up.

Creating **System Action Plans** are worth every last drop!



Are your systems ROBUST?

Results Oriented
Optimize Resources
Balanced
User-friendly
Simple
Trackable

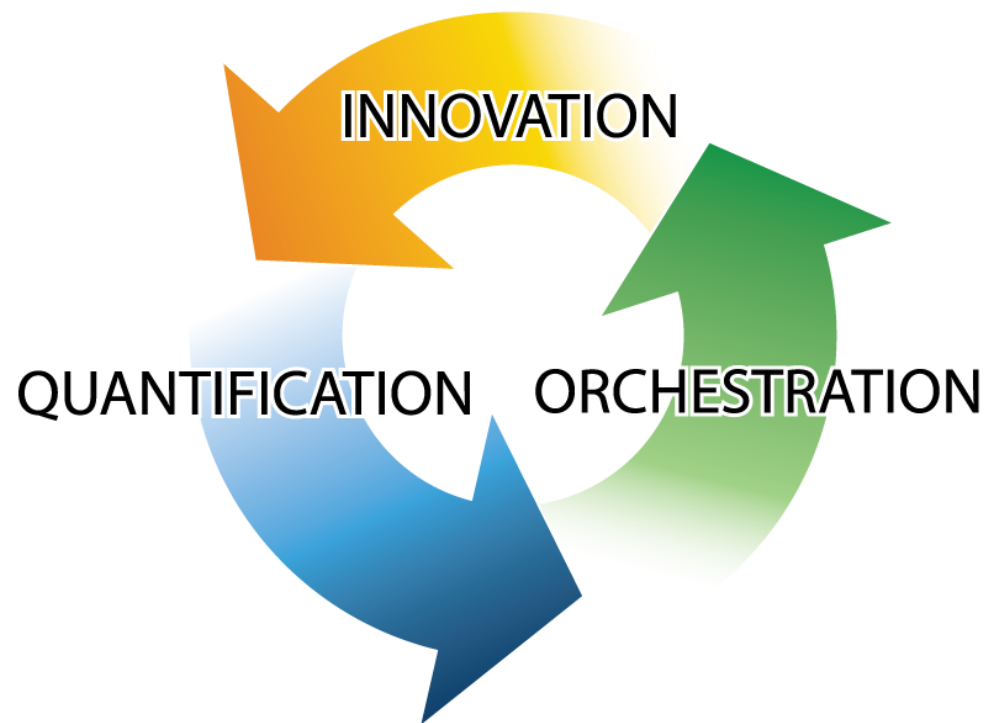
It's Not About Documenting

It's about:

- ✓ Getting superior results consistently and predictably
- ✓ Great teamwork
- ✓ Efficiency and productivity
- ✓ Delivering on your Brand Promise

It's about excellence.

Continuous Improvement



Follow-up Activity & Discussion

- Choose a desired result or routine to work on.
- Document the system using the Action Plan template.
- Break into pairs, exchange and evaluate worksheets and results.
- Ask: *“Could you follow this Action Plan?”*
- Roundtable Discussion



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Consultation with an E-Myth
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