

THE WHOLES LE FORMULA

Module 6 – Developing a Business Workflow

Hey guys, Eric here. In this lesson, I'm going to discuss why it's important to develop a workflow of each job in your business. A workflow is a sequence of processes or events that work passes through to go from initiation to completion. I realize that is an incredibly technical definition (thanks, Webster). In more common terms, think of your workflow as the path from ordering a product to selling it. Everything in your business is part of your workflow and should be developed to be as smooth a process as possible.

The purpose of creating processes in your business is to reduce the difficulty to complete a given task, and make that task as efficient and replicable as possible. When you simplify a task, you make it easier to outsource which allows easier scaling.

If your goal is to develop a cohesive workflow, you have to understand your current processes. Take a process and break it down into individual steps.

Here are a few questions you should ask yourself as you go through this exercise:

- 1) Why do these individual components exist? This question can help you look for unnecessary or inefficient steps of a process.
- 2) Is this the ideal set of steps to complete this task? This can help you identify ways to improve a workflow. This doesn't have to be complex either. Here's an example. Long ago, we would simply toss these poly bag self-seal strips in the floor while processing items. We would then sweep them up at the end of the day. We soon realized that we were adding an extra step, sweeping, which was completely unnecessary. Instead, we simply tossed them directly into the trash instead of the floor. Nothing complicated or brilliant about it, but that one change saved us several hours over the course of a year.
- 3) Can parts of this process be removed, and the process still work effectively? Here is something that you have to understand. If you can remove a component of the process without reducing effectiveness, you should cut that part of the procedure. Unnecessary steps and actions prevent efficiency.

Whenever we create processes internally in our business, our goal is to strip them down to be as basic as possible. This functions to improve efficiency, but also introduces the element of scale. The more basic your procedures are, the easier they are to outsource and bring on new team members.

Remember, scale is the ability to create repetition in your business to automate or outsource tasks.

When you are looking at a workflow, or the sequence of processes to complete a job, you have to pay extra careful attention to your transitions. In terms of transitions what I mean specifically is changing from one process to the next. Each process needs a clearly defined end and starting point. You need, ideally, for one employee to complete a task, then another to be able to pick it up and run with it with minimal interaction.

Please understand, I realize that you may not have employees yet. This is actually ideal, as setting up true scalable processes is much easier without employees. It is better to introduce employees into a defined process.

When you are developing transitions, look at the following aspects:

- 1) Do they have a clear defined end, and beginning?
- 2) Do they require little, if any, interaction with other parts of the process to complete?
- 3) Are there clear markers for task completion?

Once you have developed a transition, look at the next place a new process is picked up.

Developing a logical workflow is perhaps the most difficult aspect of creating a workflow. Think about, for example, how a product would move throughout your building or how you would go from finding a lead to contact, to account set up to the initial order phase. All of these steps have to be logical and efficient; create little waste by removing unnecessary steps. Think Henry Ford and his famous assembly lines.

The way we have designed our processes is such that one person does as few steps as possible to complete it. This streamlines your employees or team members jobs and makes it much more likely that they will complete the tasks with a high degree of accuracy.

The most important aspects of great processes are efficiency (being able to move through processes quickly and without creating waste or friction) and accuracy (being able to complete a process while achieving consistently desired results). By focusing on those two aspects, this creates an opportunity for you to set standards as results will be predictable. Similarly, it will help you more easily identify or diagnose failing parts of your process and take corrective action. A red flag for us, is when results vary (either in production OR in accuracy), and should be a measuring stick for any processes that you create.

When you are looking for team members, bringing in someone with your personal level of efficiency will be nearly impossible. Those employees are unicorns. Instead, we want to create processes that anyone could do, and we can plug people into roles and have them being highly effective as quickly as possible.

As your business grows, it becomes harder to make these changes. It's harder to make them when you have employees and there will be growing pains. Our suggestion is to set these up, document them early and constantly review and look to refine your individual processes and transition points. That concludes this lesson. Thanks for watching and I'll see you soon.