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

3 Essential Business Disciplines
- Money
- Management
- Leadership

3 Essential Business Processes
- Lead Generation
- Lead Conversion
- Client Fulfillment
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
"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
### Result Statement

| Position with Overall Authority: |

| Participating Positions: |

### Accountable 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

<table>
<thead>
<tr>
<th>Role</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Staffing:</strong></td>
<td>Amount &amp; types of manpower necessary to fulfill the intended result.</td>
</tr>
<tr>
<td><strong>Space and Facilities:</strong></td>
<td>Type of space needed to fulfill the intended result, utilities, environmental factors, etc.</td>
</tr>
<tr>
<td><strong>Equipment:</strong></td>
<td>Office equipment, machinery, vehicles, etc.</td>
</tr>
<tr>
<td><strong>Supplies:</strong></td>
<td>Forms, office supplies, raw materials, components, etc.</td>
</tr>
<tr>
<td><strong>Information:</strong></td>
<td>Reference materials, databases, pricing schedules, operating instructions, etc.</td>
</tr>
</tbody>
</table>
System Diagram
Identify the flow of work steps in the system and diagram them using boxes and arrows
# Action Plan Template

<table>
<thead>
<tr>
<th>#</th>
<th>Benchmarks</th>
<th>Accountable Position</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Benchmarks** (aka “steps” or the actions) needed.
# System Action Plan Template

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

## Description of System Benchmarks

<table>
<thead>
<tr>
<th>#</th>
<th>Benchmarks</th>
<th>Accountable Position</th>
<th>Timing</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
<td>Collect evaluations at workshop site.</td>
<td>Trainer</td>
<td>At the end of the workshop</td>
</tr>
<tr>
<td>2.</td>
<td>Fax evaluations to Client Services with final workshop and trainer scores.</td>
<td>Trainer</td>
<td>Immediately after workshop.</td>
</tr>
<tr>
<td>3.</td>
<td>Write Workshop Summary Report and submit to Sales Person.</td>
<td>Trainer</td>
<td>Within 1 business days of the workshop.</td>
</tr>
<tr>
<td>4.</td>
<td>Review evaluations and highlight key points and items to be aware of.</td>
<td>Client Services</td>
<td>Within 2 business days of the workshop.</td>
</tr>
<tr>
<td>5.</td>
<td>Send the evaluation summary sheet and the evaluations themselves to the Sales Person.</td>
<td>Client Services</td>
<td>Within 2 business days of the workshop.</td>
</tr>
<tr>
<td>6.</td>
<td>Review and complete Evaluation Summary Sheet, adding trainer feedback and key points for discussion.</td>
<td>Sales Manager</td>
<td>Within 3 business days of the workshop.</td>
</tr>
<tr>
<td>7.</td>
<td>Place first call to client to review feedback, key points, and call to action.</td>
<td>Sales Manager</td>
<td>Within 4 business days of workshop.</td>
</tr>
<tr>
<td>8.</td>
<td>Email Evaluation Summary to client.</td>
<td>Sales Manager</td>
<td>Within 5 business days of workshop.</td>
</tr>
<tr>
<td>9.</td>
<td>File Evaluation Summary in client’s “quarterly review” folder to prepare for that discussion.</td>
<td>Sales Manager</td>
<td>Within 5 business days of workshop.</td>
</tr>
</tbody>
</table>
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.
Standards are requirements for performing the work and achieving a result.

- Quantity
- Quality
- Behavior

<table>
<thead>
<tr>
<th>Systems/Standards</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.</td>
</tr>
<tr>
<td>2.</td>
</tr>
<tr>
<td>3.</td>
</tr>
<tr>
<td>4.</td>
</tr>
<tr>
<td>5.</td>
</tr>
</tbody>
</table>
Title/Code: Post Workshop Client Follow-Up

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

*Use additional sheets as needed*
<table>
<thead>
<tr>
<th>System Quantification</th>
</tr>
</thead>
</table>

How will you **measure** the achieved result?
## System Action Plan Template

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

### Resource Requirements

<table>
<thead>
<tr>
<th>Resource</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Staffing</strong></td>
<td>Trainers, Sales Managers, Client Services – enough staff in place for this level of business.</td>
</tr>
<tr>
<td><strong>Space and Facilities</strong></td>
<td>N/a</td>
</tr>
<tr>
<td><strong>Equipment</strong></td>
<td>Fax Machine needed at client site, most already have them, and we may need a portable scanner to be self-reliant.</td>
</tr>
<tr>
<td><strong>Supplies</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Information</strong></td>
<td>Participant comments must be in pen.</td>
</tr>
</tbody>
</table>

### 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:

A. Satisfaction with our company overall
B. Frequency and value of communication
C. “WOW” moments that are referenceable

Annually we will review:

A. Revenue
B. Number of training events
C. Number of training products offered
D. Total # of participants trained
Coffee Making Action Plan

Creating **System Action Plans** are worth every last drop!
Are your systems ROBUST?

R esults Oriented
O ptimize Resources
B alanced
U ser-friendly
S imple
T rackable
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

INNOVATION

QUANTIFICATION

ORCHESTRATION
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
The E-Myth Mastery Program®

Request a free Business Consultation with an E-Myth Program Advisor

Toll Free in the US
800.221.0266

Outside the US
+1 541.552.4636

www.e-myth.com
We’re social!

Follow us on Twitter: twitter.com/emyth @emyth

Find us on Facebook: facebook.com/emythworldwide