10 Steps to Creating Systems & Automating Processes to Help Your Business Run Smoothly

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Since you're reading this report you're either at a point in your business where you're ready to start getting things ready so you can start outsourcing tasks or you're already outsourcing but realize you need to get some systems into place to make things easier for everyone involved moving forward.

Before you can set up those systems & start automating things in your business ***you*** have to know your business inside out.

Sadly, even the best virtual assistant probably won't have "mind reader" listed as a skill [if you do happen to find one, please email me ;-)] Putting systems in place will save you time, money & frustration and really, it's pretty simple to do. Here are ten very concrete steps for you to tackle. Go down the list, check each item off and you'll be setting yourself up for great success.

Step One: Set Your Goals

The core of your success is setting goals and meeting them. Once you've set the goals you need to make sure your virtual team understands them and is committed to helping you reach them.

When it comes to goals think about the twin "C"s.

- **Clarity** about the common goal, and
- **Commitment** to reaching it.

You also will need the twin "D"s in place to ensure this happens:

- **Definition**
- **Deadlines**

Each of your projects should have clear objectives. Once you give everything the information they need to perform their tasks then your projects should be completed without any problems.

The key to achieving all this, however, is making sure you choose the right people to work with.

Knowing exactly who you need, what you want them to do and taking into account how they are going to work together is vital to everything else working.

And *then* you need to ***clearly communicate your goals and set out parameters*** for reaching them.

Build your team carefully.

Think about how they will work together and *if* they will work together. (Many marketers run their teams “blind”, with each member having zero knowledge of the other members; or even that other members exist.)

You also have to have an idea of what team dynamics you want to create and what those dynamics are going to be like.

One of the other problems in running a virtual team: Putting a face to a name. When you are working together in person, you soon get to know the other person, and being able to put the face to the name helps create bonding.

You need to know which type of set up – personality-based with disclosure and inclusion in your business process, or task-oriented with the focus strictly on component completion – works best for you and your business.

Once you’ve determined your team dynamics, you need to know how to get around the inherent problems in both models and head them off at the pass.

Step Two: Setting Up Your Team

No matter which type of virtual team model is best for your business, you do have to make sure everyone knows their role, as well as what they are accountable for.

Even if you prefer to keep your team members isolated and unaware of each other, interacting only through a single manager (you or a virtual management specialist you've hired) who acts as a gatekeeper, it's a good idea to let each team member know how their role impacts the production line – and your launch date.

If you have a production "line", send each member a mind-map or chart, showing how each one's fulfillment affects the next person along the line.

Let them know what the consequences are if one member fails to fulfill. When you are interviewing members (especially web designers) ***ask them how they manage scope creep***.

This is a phenomenon that affects any project in which (a) several members are involved (b) client parameters cannot be exact.

Exact (minimal to no scope creep)	**Imprecise (invites scope creep)**
One blog post, 750 words maximum.	Photo with ragged clouds over building

As you can see in the table above, knowing that you want no more than 750 words written helps your writer plan and deliver the product on time. It enables them to accurately predict how long this will take, based on their writing experience.

If you are vague or imprecise in directions ("I want this photo to show the sky with ragged clouds over a building") you may waste your own and the photographer's time demanding reshoots…

…All because you forgot to tell him that you want the photograph to be shot with old, decaying, round hay bales in front of the building; and that the latter should be abandoned, as well as surrounded by encroaching forest.

Make sure you understand what you are asking, too.

Not understanding the process your photographer has to go through to create what you specify can be a major source of scope creep.

For example, he comes back with the exact shot you need, and you have kittens because he's billed you an extra six-hundred-and-fifty dollars. ("Last month, when I wanted those apples re-shot, it only cost me the price of the shots!" "Yes, but to find exactly what you needed I had to drive round the eastern part of the state behind the foothills for four hours; then rent a front-end loader to move four old hay bales to a spot in front of the building. There's a one-hundred-dollar-an-hour minimum for location-seeking in non-studio shots, remember? Plus the cost of the front-end loader…")

That's scope creep – and that's something you need to be aware of, when dealing with virtual employees and contractors for your project-based business.

Some common examples of scope creep:

- Your own client asks for rewrite after rewrite on that simple 750-word blog post he ordered, which your copywriter supplied. Since she specified "one rewrite only" included in her services, you now have to pay her far more than the job is worth.
- The client wants "one small little detail changed" in the web design you presented and delivered on target. That small detail loses you (through your web designer) an additional nine hours and impacting the rest of the team.
- Your virtual assistant doesn't tell you she had to put in fifteen extra hours to set up your shopping cart, because you chose one that doesn't integrate with your Autoresponder without major tweaking. You choke at the bill.

What you should hear from the potential team member you are interviewing is that they have ***concrete methods*** of allowing for and dealing with scope creep, such as:

1. A set number of (revisions, words, re-shoots, tweaks, redesigns)

2. A set of protocols she follows and questions she asks

3. Failsafes in place, such as Contracts, Client Questionnaires or Project Sheets

Failing that, she should ask *you* what your protocols are for dealing with curveballs such as scope creep.

And you should have an answer! (If a potential team member says, “What’s scope creep? You might want to decide if it’s worth educating him or look elsewhere)

Step Three: Protocols and Processes

Projects can typically go out of control when:

a) More than one person is involved

b) There are “holes” in specs and parameters for misunderstanding and confusion (i.e. specs are not precise)

c) Project progress and delivery are not anticipated and planned out meticulously

d) A system is not followed

Operating from standard protocols and processes can eliminate ninety-five per cent of problems like scope creep, or the chain of delivery breaking down.

There are two ways to do this:

- **Systematize**
- **Automate**

Combine these together, and you should have a powerful, virtually foolproof system.

To create a system, write down your goal and objectives for every project (as a general guideline applied every time, if projects are all highly similar and repetitive; or by individual projects.)

Next, take a blank sheet of paper for every position on your team. For example, if your virtual "team" consists only of you plus your new VA, take two sheets of paper (or do this virtually, if you prefer) and write down all your responsibilities and tasks on one; and hers on another.

If you have six team members, take six sheets of paper. And so on.

Try it – even if you think you know exactly what everyone has to do, you'll be amazed to find yourself thinking of things to add – things you need to re-think or adjust.

Now write a "Company Manual" based on these results– even if this is only a three-page document.

Begin your Company Manual with a "mission statement", saying what your company is all about and what it wants to do for its clientele. (This will help your contractors understand what your business is all about, so they can better represent it.)

Your Company Manual should include documents such as[1]:

1. Style Sheets

Style Sheet: Mary Lane Publications

Headers: **12pt Verdana, bold,** RGB 153,0,51

Subheads: **11pt Verdana, bold**

Body Text: 9pt Verdana

Bullets: Double-spaced, open circles

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[1]Choose only the ones that are relevant to your business

2. Client Questionnaires

Client Questionnaire – Event *(Please read through completely before answering)*

1. Date of Your Event: ____________________
2. Physical Event or Virtual Event? ____________
3. Date you need written content: ______________
4. Event focus (your goal in getting your intended audience to attend):

   ____

Contractor Questionnaires

Web Designer Questionnaire

1. Do you use DreamWeaver?
2. Will you be sub-contracting the Flash portion of my website out elsewhere?
3. How many revisions do you allow?
4. What is included in the website prices listed on your site?

3. General Project Instruction sheets

Project Instructions: Starless Media

All questions to be directed to Ann Mann, Office Manager.

Delivery via DropBox (Starless Media folder)

Send confirmation of delivery. You will receive confirmation of receipt within six hours.

4. Contact information – including who takes care of what problem type

Contact Joe Snow, Project Coordinator – joesnow@mcmurray.com

Content questions: Cheryl Bleach, Senior Editor – cherylbleach@mcmurray.com

Formatting & graphics: Karen Wing, Production Manager – kwing@mcmurray.com

For all other questions, contact Edith Leg, VA – edithleg@mcmurray.com

5. A list of expectations and other data (e.g. rate of pay, wage increase intervals, vacation notice, etc.)

> We pay 30% retainer, 70% upon delivery. All funds delivered through PayPal.com.
>
> We require 6 weeks notice if you intend to take vacation time over 3 days. You will receive $ __________ /hr. At your third month anniversary date, this will be increased to $ __________/hr.

The beauty of creating your own office manual: You can tailor it to your unique set up. For example, you can segment your contractors by color (using different-colored paper) or by different sections in you "Master" binder, so that you instantly know that copywriters only get the pink forms plus all white ones, while web designers get the yellow and blue forms, and fulfillment staff gets all.

Have one central contact person, whenever possible. Have her report directly to you at a specified time of day with all queries, problems or requests. Make sure she is enabled to speak for you in all but the most crucial situations.

The more you put down in writing, the less you risk errors in judgment or oversights being made.

Step Four: Project Communication

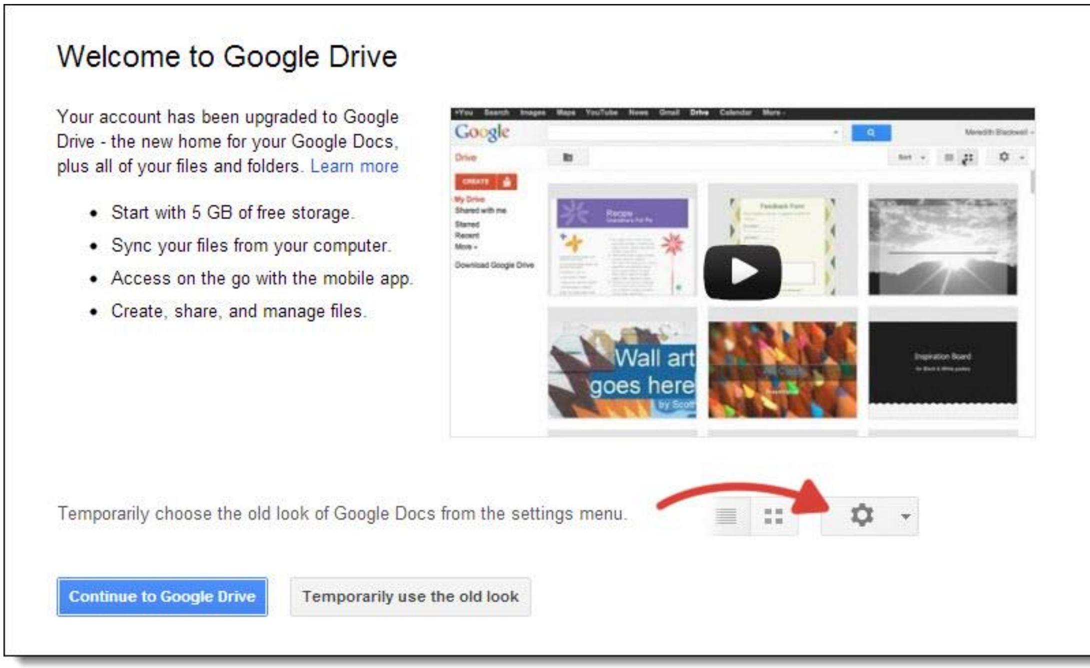
Just as it can be confusing to have people cross-communicating online all over the place, so it can be confusing when graphics, text, apps, programs, and other online content are delivered piecemeal.

Document Sharing Systems – One of the greatest ways to help automate your business and cut down on questions: Use a Cloud sharing system. That way, everyone can access project folders (or you can restrict access to certain folders) – but everything is in one place and, as one VA recently put it, "you know where to look, without having to think about it".

> ***TIP***: Provide video training to all new staff (or provide the links to existing video training) in how to use the Cloud storage system of your choice. When interviewing, ask if the candidate is familiar with that system.

There are various Cloud storage systems. Some are free; some require monthly payments – there is bound to be one out there that suits your business and budget. Here are three of the most popular…

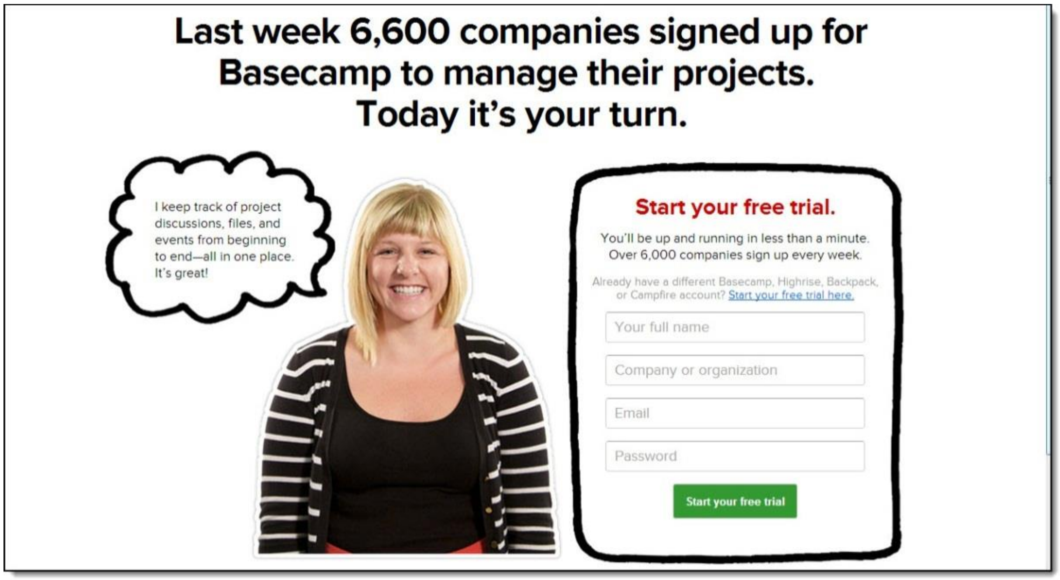
1. [Google Drive]() – The old Google Docs revamped.



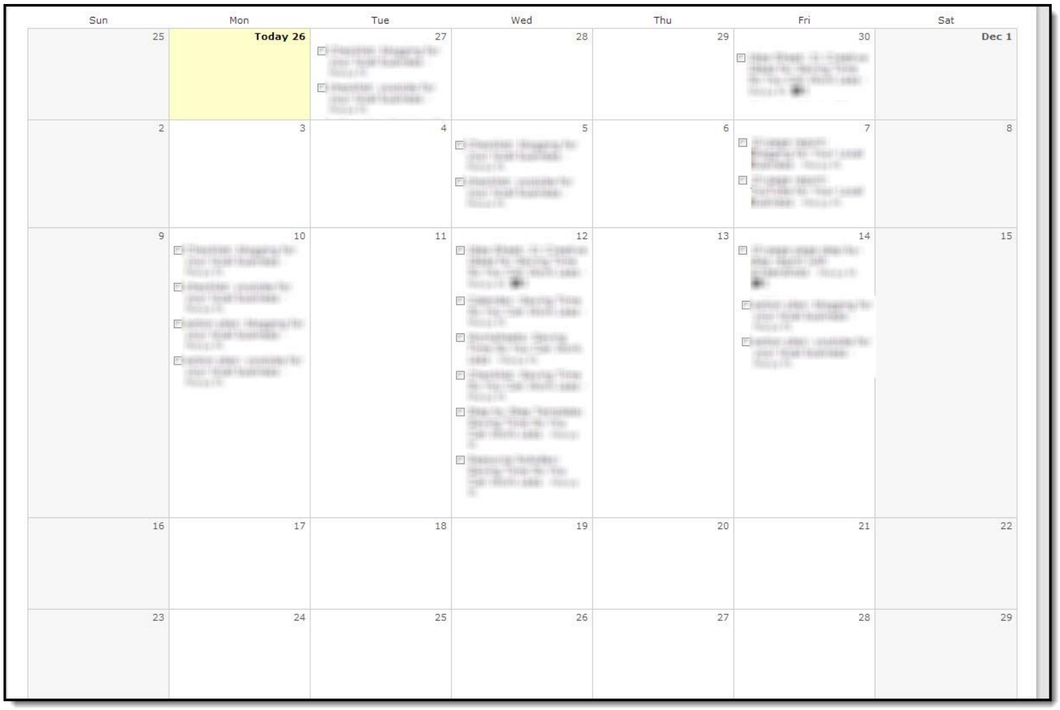
2. [Dropbox]() – One of the most popular free Cloud systems to date

You download Dropbox to your desktop and it looks just like any other folder – but people you collaborate with online have to be invited to share your folders. (And they can invite you to share theirs.)

3. Basecamp – Geared specifically to project management, this system is not free: However, there is a 45-day free trial and it starts at only $20 per month.

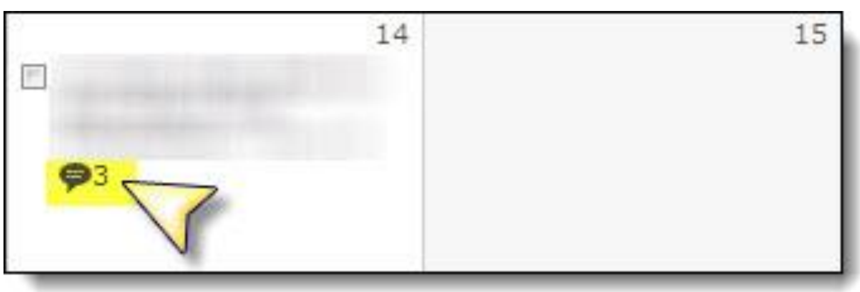


Basecamp allows you to see all your projects at a glance; all your contractors; individual notes and conversations; and a calendar for each person, as well as projects.



In the conversation section for each project, your virtual team members are able to upload Profile photos, so each has a visual of the person she is conversing with. This can help people feel more connected.

A little balloon appears beside the project listing, if there is a message to be read.



This balloon changes color if you input a reply, plus the number of messages is displayed, so you can easily see just by glancing at your calendar if there are new messages. (Besides which, a notification is sent to your email address too.)

If you only have one or two or three members in your team, Google Drive and Dropbox may be just what you need.

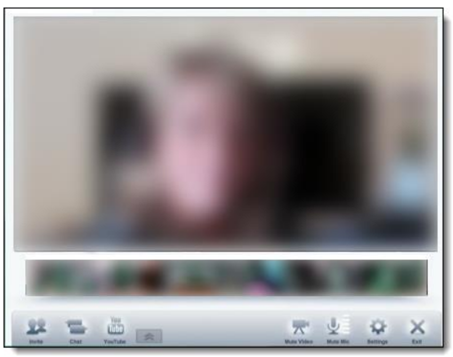
If you have more than two or three team members, Basecamp will save you a lot of time and confusion – and ultimately will be well worth the return on investment.

Step Five: Project Communication (Verbal)

Some people like to help their virtual team bond over regular meetings – post mortems at the end of every project; brainstorming sessions before the next one starts; weekly check-ins – whatever works best for your team.

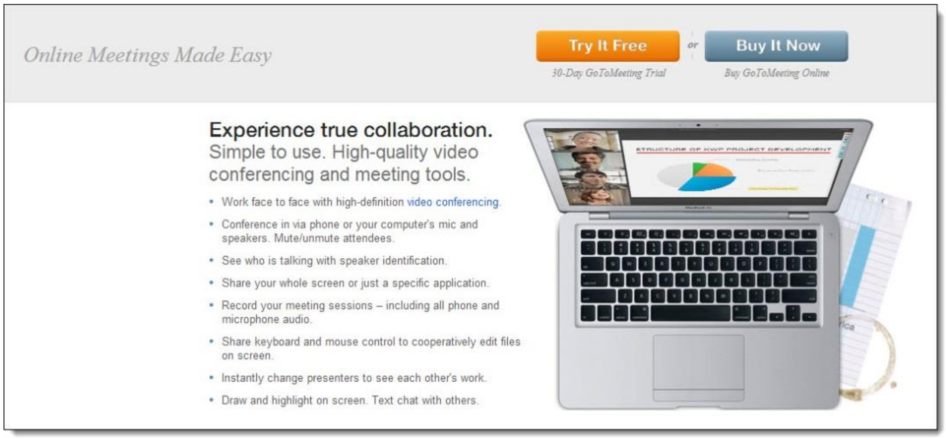
Virtual Meetings - Thanks to technology, there is more than one way to achieve virtual meetings.

1. ***Google Plus Hangouts*** – One wonderful feature of Google Plus has gone unnoticed by a large majority of its users: The ability to instantly create a Hangout and participate in a genuine, **multiple-user video chat**. (You can even all watch a YouTube video within your video hangout.)



The person speaking appears in the main window, and small "thumbnail" views of the other participants appear below in a narrow bar. These are live screens, so everyone can see the other participants' reactions in real time.

2. ***GoToMeeting*** – Another extremely reliable option is GoToMeeting. You can not only chat live and face-to-face, but you can also share applications and screens.



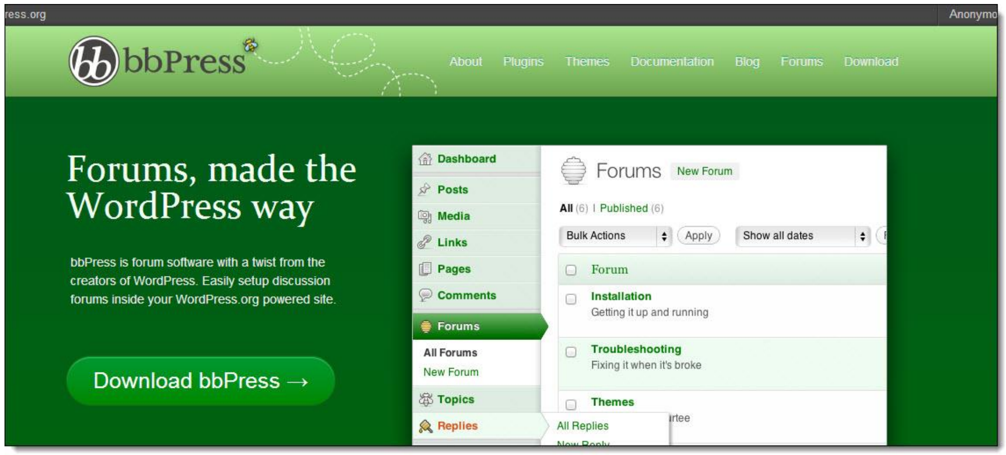
In addition, you can record your meetings, as well as switching to different presenters.

GoToMeeting is not cheap at $49.00 per month, but if you pay yearly you can save $120.00. Plus there is a thirty-day free trial – which ought to give you enough time to see if it's working for you and your team. (And make sure none of your members lives in an area that won't allow GoToMeeting's area code.)

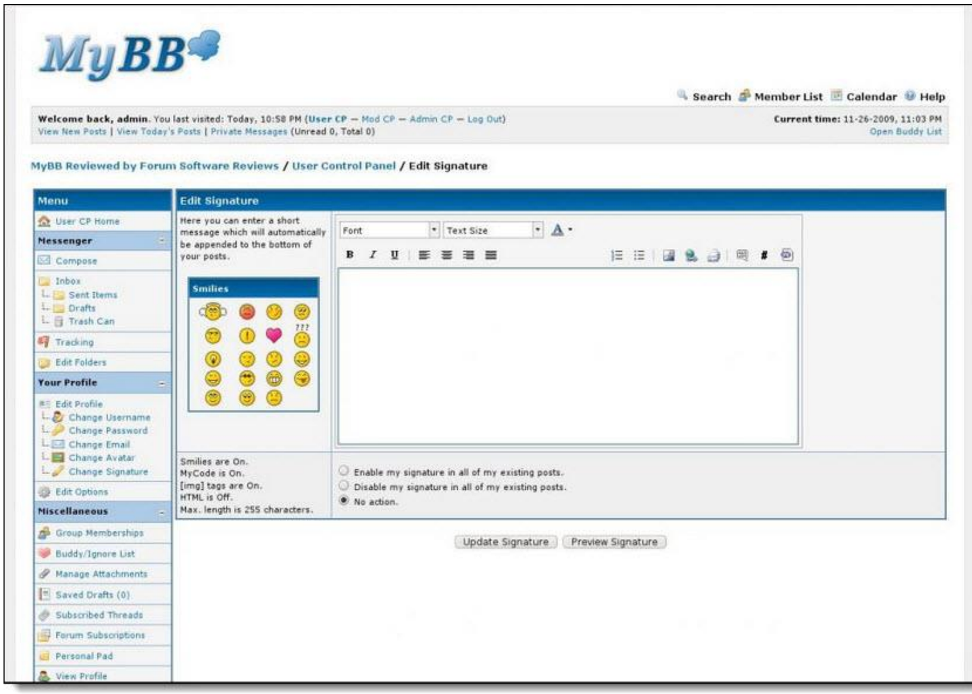
3. ***Facebook*** – If you only have one team member or you prefer to talk one-on-one, don't forget that Windows Live allows you to video chat via your Facebook instant messaging.

4. ***Forums*** – And if you want something less high-tech, remember you can always create a private Facebook group; or use a forum system such as:

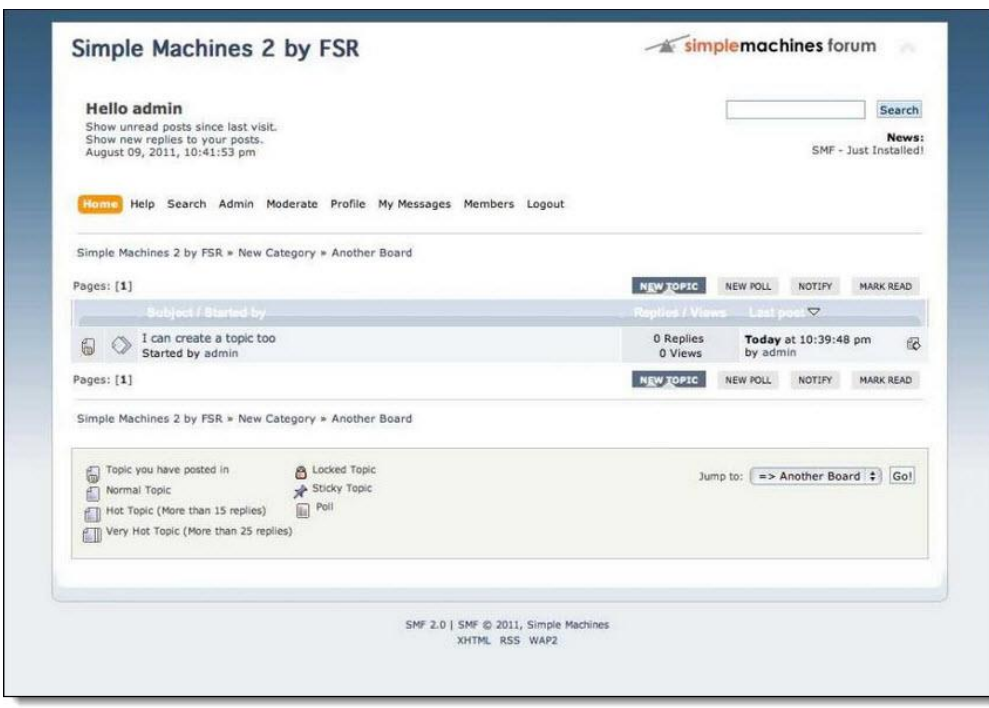
- bbPress (free)



- [myBB](#) (free)



- [Simple Machines](#)



Skype has also released a Beta video chat feature. Although it's currently free, it has so far received disappointing reviews.

No matter what communication system you set up, however, designating one person as your "team captain" and having all communication go through her will help cut down on confusion, cost and creep. She will be able to keep the team focused on project completion.

Step Six: Handling Emergencies

One of the most logical reasons for outsourcing or hiring a team: ***Making sure your business can carry on without you***, in case of emergencies.

This is where your Company manual should come in handy. Your master copy should contain full contact information on all members, as well as your own complete contact information.

It should also lay out who takes over in case of emergency. (Do make sure they know they are going to do this – and that they are trained!)

The best team should be able to run like clockwork – even if you're in a deep coma after getting struck on the head with a chunk of ice from the dread planet Nibiru as we narrowly miss the December 21st Mayan Apocalypse.

Step Seven: Creating a "Climate of Trust"

Which brings us to another absolute team essential: Creating a climate of trust.

If you keep everything "secret" from your team, and don't let the left hand know what the right is doing, you'll be up the proverbial creek if something happens to you and you don't have one person lined up and ready to temporarily take over. Ditto if only *you* know who is responsible for each part of a project, or who is involved.

You can run your business this way – but do make sure you have detailed instructions in your Manual; that you designate someone to run your business while you're out for the count; and that the right people know how to get in touch with your designated representative.

Creating a climate of trust entails so much more than simple organization – but having things run easily, clearly and simply goes a long way towards ensuring that climate.

Assign people clear roles. Recognize their strengths – assess their unique skills and ability mix when you first interview them. And then let them get on with the job.

Don't micromanage. That's not what you created a team for: You wanted more freedom to do more important things than figure out how to set up your automatic affiliate payments on PayPal when your VA (the one you hired to save you time) is perfectly capable of doing that for you.

Making your processes and company culture challenge-oriented rather than blame-oriented will help lift anxiety, fear, stress, jealousy and a whole host of other negatives off your team members' shoulders.

Focusing on the problem and looking for the best solution avoids finger-pointing and "blaming and shaming" your team members. (And remember these will most likely be outsource contractors rather than employees. If they are usually strong team members and you blame and shame them in front of peers – or allow personalities to start doing that to each other at virtual team meetings – you will soon lose that contractor, leaving the rest degenerating into unhealthy habits such as "snitching" on each other, blaming each other, becoming paranoid about each other – sure signs of a toxic company culture and weak management.)

Also find out what challenges your team is facing with your projects, and take steps to solve it. Rather than giving someone a raise to "keep" them in a difficult role, buy them software that helps them automate the step they are finding difficult.

If a particular type of task always takes twice as long to complete, either split the task between two people or reassign it. Before you do this, however, see if the two of you can figure out where the problem lies.

Step Eight: Feedback and Analysis

People handle feedback and analysis in different ways. Some like a “round table” meeting, with everyone discussing the project after it has been completed. The leader gives a summary, then asks each person for input. Out of this process, they get:

- What went particularly well (and why)
- What needed improving (and why it wasn’t improved)
- How the process could be improved in the future

If your business model has no necessity for this much interaction (and besides, you’re too busy churning out the next project) you can skip this step, of course.

But do make sure you give your team members feedback (even if you keep the analysis for yourself).

Remember that a word of praise will accomplish so much more than “sweating the small stuff”. Use well-deserved compliments – don’t gush over every task, but do congratulate your team members on a job well done at the completion of a project.

If you have to deliver criticism, do so in a manner that starts with pointing out a positive first. Be direct and clear about what didn’t work, and ask for a fix.

Step Nine: Standardizing and Streamlining

After each project is completed, part of your analysis should be to determine where you can streamline and automate your process even more.

For example, if you notice that during the last three projects, you ended up forwarding a particular form or letter to team members or move finished projects to a common folder, automate that task by creating an Outlook Express “Quick Step that will allow you to do this in one click.

Create, share and use Templates for tasks that turn out to be repetitive and standard for your company's projects.

Look for places where your team is unwittingly losing you money. Create a solution and implement it.

Never change for the sake of change, however. Another good rule to observe is "if it ain't broke, don't fix it".

For example, if your content is always due on the twenty-first of the month and you change it to the nineteenth, you've just opened up a door for confusion, complaints and chaos. That won't necessarily happen – but do make sure that any changes you make are necessary and improve team morale and workflow.

Step Ten: Rewarding Your Team

Just as you put effort into discovering "what's in it" for your clients or customers, so you should put effort into finding out what reward each one of your team members is seeking – what motivates them to treat your business as their own.

Find out exactly what drives each team member: Does one crave approval and enjoy being indispensable? Don't be sparing with the praise, when merited. Is another all about the cash? Pay promptly and give raises when promised.

Does yet another one have some particular long term goal in mind? Is another passionate about their skill set and enjoy the work for itself? Is another just putting in time during college or university vacation?

Knowing what makes people tick can help ensure a happy team, if you act on it and help them further their goals too.

And that will ultimately be more effective than any one particular piece of automation.