Policies, Procedures, and Processes for Improved Productivity

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About Me

- Non-technical, non-certified project manager

- Technology lover

- Home chef

- Daughter, sister and best friend of small business owners

Enough about me...

- Who loves invoicing?

- How do you remember how to onboard (or offboard) a subcontractor?

- Taking any holidays?

- Is your business running you?

- Or, are you running it?

Policy vs. Procedure vs. Process

- The structure to manage like you mean it
- Policy = rules
- Procedure = checklist
- Process = system
- We will write one of each

Structure

- Why is it needed?
- Not bureaucracy!
- Repeat successes
- Stop reinventing the wheel
- Start delegating
- Better client satisfaction
- Profit

Policy

- Rules/Structure

- Not really negotiable

- Holidays, PTO (personal time off), healthcare, internal communications, etc

- Not necessary for a one-person business

  - but not a bad idea

- Let's write one: timesheets

Procedure

- Literally a checklist

- Onboarding, offboarding, status meeting agendas, installing software, server maintenance, how to update your website

- Let's write one: Onboarding new subcontractors

Process

- Prose to document a system, usually numbered steps or bullet points
- Sales
- Getting paid
- Projects

Tips for Writing Process

- Record
- Transcribe
- Write up
- Follow

Minimum Processes

- Sales
- Invoicing/getting paid
- Projects
  - Opening
  - General structure with milestones
  - Closing

What to build processes around?

- What software are you using to manage projects?

- What is your CRM?

- How do you manage finances?

- What is your time-tracking software?

- Software can drive your process
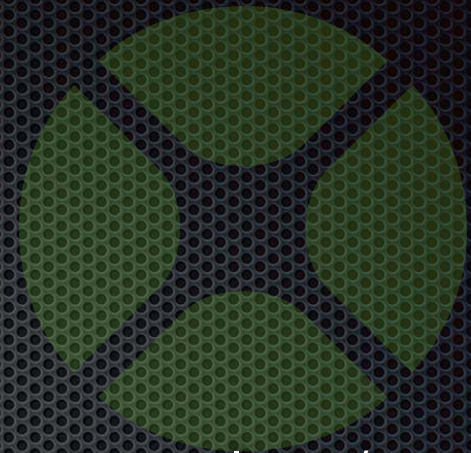
- Let's write one: Getting paid

Where to Store Docs

- Wiki

- Project Management Software

- Google Drive

- Dropbox

- Please, no 3-ring binders

Special Offer

- Free month of coaching/support with custom template/process package

- Mention Code: XOJO2018, expires June 29, 2018

Q & A

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