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# 3 Ways to Control Chaos in Your Small Business

# Manage Like You Mean It

All business owners want to manage their business well, but are you managing yours with intention? A plan? Is there a method to the madness?

Small business owners often tell us that they feel overwhelmed. They feel like they're drowning. They're struggling to finish projects. Their scope and budget are out of control. They feel like they're getting pulled in multiple directions and don't know what to work on next.

Often, these are all symptoms of one root cause: a lack of structure.

"Structure, you say!?" Boo! Hiss! Most business owners assume that adding structure means bureaucracy. But structure doesn't have to be a dirty word.

Structure done right doesn't drag you down with complexity—it frees you up to do more, faster. The right kind of structure enables quickness and agility, allowing you to stay nimble and respond and adapt quickly.

**Use the strategies in this ebook to add structure that will *set you free.***

Don't let your business run you — you run it. Take control of your business and manage like you mean it.

## Susan Fennema

CEO AND FOUNDER
BEYOND THE CHAOS

# Control Chaos in Your Small Business
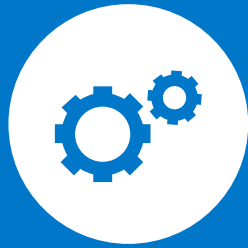
1. BUILD YOUR SYSTEMS

2. MANAGE YOUR PROJECTS

3. LIMIT YOUR INTERRUPTIONS

# 1. Build Your Systems

When tasks seem excessive or redundant, or in some cases costly or ineffective, you should consider creating a system. Building systems helps you avoid doing the same thing over and over again — you might even be able to automate some of the steps. Not only will you gain more consistency, you'll also free up your time and gain some control over an otherwise chaotic work environment.

But, where do you start? When should you consider building a system?

# When Do You Need a System?

### WHEN YOU'RE THE ONLY PERSON WHO CAN PERFORM A TASK.

If you're the only person in your company who can perform a specific task, it's time to systemize that task. When you automate these kinds of tasks, it takes it off your plate entirely. That means you'll have more time for more impactful and more important work.

### WHEN YOU WANT TO DELEGATE.

When you start delegating tasks that you don't need (or want) to be doing, you'll be able to start working on your business rather than in it. You'll be able to focus on big-picture strategy.

### WHEN YOU ONBOARD/OFFBOARD TEAM MEMBERS.

If you're doing certain tasks infrequently but with a lot of steps, you've identified an opportunity to create a system. For example, small business owners don't often bring on subcontractors or freelancers, or interview and hire employees, but it's important to be consistent in how it's done. Consistency allows you to look back and improve specific steps when something isn't working with a new hire.

### WHEN THERE'S HIGH EMPLOYEE TURNOVER.

If you are having high employee turnover, look at the systems you're providing to your team. If there isn't a clear process, the lack of clear expectations could be why employees are leaving. Or, if things aren't getting done – or aren't done well – blame the process, not the employee, and make adjustments to move forward.

### WHEN YOU WANT TO REPEAT SUCCESS.

When you're happy with your work or if a project went great, document everything that went well, so you and your team can do it the same way the next time. Recording your successes sets the foundation for continuous improvement.

One of the results of systemizing is to build your long-term business value. You'll be able to sell more than just a client list. You'll have methods and processes that people can follow to repeat your successes.

Think about what that looks like.

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If you were to remove yourself from your business, would it run without you? If not, identify the bottlenecks that are **affecting your business' long-term value.**

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When identifying excessive or redundant processes, ask yourself, "Why do we do it this way?" Is it just a habit, or is there another reason? Keep asking yourself why.

Don't accept the answer — even from yourself — that "we've always done it this way." The current way isn't working, so you need to dig in and get to the root of why you've adopted this 'way.' Maybe there's a good reason. But if you don't know it, then consider eliminating that process and finding a better way to get the work done.

# Policy vs. Procedures vs. Process

To reduce the chaos in your business, your company must be run, not as though you're the only one that can do it, but as though it's a company that can operate very, very successfully without you.

But before you begin building the systems to make that happen, you first need to understand the difference between **policy, procedure, and process.**

## POLICY

The policy is the rule. You might not need policies if you're a one-person show. But, even back when I was a one-woman show, I had policies in place to hold me accountable to the rules of my business.

For example, I put a policy in place that we were closed on holidays. Because I had a policy, it was easy for me to tell clients that it was a company holiday, rather than getting sucked into doing work. I set the expectations publicly, updated my calendar in advance, and blocked off those days to meetings. It is very important as a small business owner to give yourself those breaks.

If you're working with a team, your policies could cover anything from how people enter timesheets to how they ask for vacation. You, the business owner, set those policies as you set expectations. They are non-negotiable. And you need to hold your team accountable to them.

Policy is set so everyone understands the expectation. You won't be mad when somebody asks for vacation, because you understand that you've already set a vacation policy upfront. Team members know when they can (and can't) take vacation. And if they ask anyway, you have a company policy to rely on, rather than the "no" coming from you personally.

Clear expectations make everybody happier.

## PROCEDURES

Procedures are really checklists. Think about an airplane pilot performing a preflight check before the plane takes off.

He goes down a list. He doesn't have to remember what's next. He doesn't have to remember what he did last time. It's a consistent procedure, every time.

In your business, it might be a template that you follow on a project, a general onboarding checklist that you follow for every new hire, or a list of steps you complete each time you post a blog article.

A procedure can be part of a process.

## PROCESS

A process is a written system and includes more details about why you do something, or how you do it. It could be instructions on how you work between one software tool and another, or maybe it contains the steps of your sales process, which might not flow in a checklist fashion. You might have to explain some ifs, ands, or buts between each step.

A written process can be useful when there's a gap in your software tools — if you need to do something manually rather than via automation. Processes are written as bullets, numbered lists, or just prose. The important part is to record your process so you and your team can follow it consistently.

# Suggested Processes for All Businesses

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|---|---|
| **SALES** | Reminders to follow up with prospects post-conversation, so you don't drop leads<br><br>Standard email templates |
| **INVOICING** | Invoicing on a regular schedule to ensure you're getting paid |
| **RUNNING PAYROLL** | Making sure you're paying employees, contractors, and subcontractors on time – don't forget to pay yourself<br><br>How to do it – so you can delegate to your bookkeeper |
| **OPENING PROJECTS** | Creating triggers for when a sale becomes a project (proposal signature or paid invoice)<br><br>Setting up new projects with consistent steps<br><br>Closing projects, including making sure your clients are satisfied and/or providing you a testimonial |

During a client engagement, Brad Stanford, of Two Story Systems, said, "The way to accomplish a big thing is to do all the little things that make it up." That's what process is. **It's writing down the little things that create the big thing.**

# Software Influence

Software can drive the process if it functions well for you, or it can slightly influence process if you have chosen software that fits the way you want to work. If you have gaps where your software doesn't work and you have to add steps manually or bridge between software, you can write down the process for those steps as well.

**SOFTWARE TOOLS THAT MIGHT AFFECT YOUR PROCESS:**

- Customer Relationship Management (CRM)
- Finance
- Project management
- Time entry
- Data storage
- Client support

What tools are you using for all those areas? And how and when do you jump between all those tools? These are important questions to consider, since they influence your process.

If you don't have tools for these various areas, you should seriously consider adding them. This **list of recommendations** can help you narrow down your choices.

# 2. Manage Your Projects

The next way to reduce chaos in your business is through project management, and it's going to make a big difference in your world! The foundational elements of good project management include:

- A Clearly Defined Proposal
- Regular Status Meetings
- Project Management Tools
- Managing Change
- Setting Timelines

# A Clearly Defined Proposal

Project management starts with a well-defined proposal, including a clearly defined scope, budget, and timeline. If you start with a vague proposal, it will be more challenging to manage the project and you'll hinder your client's and team's abilities to clearly understand expectations.

# Regular Status Meetings

Status meetings are a tool to help you manage your projects. If you're running a project, hold regular standing meetings with that client. Put it on the schedule as a repeating event and make sure that you only cancel it if there really is nothing to talk about.

**THE PURPOSE OF THESE MEETINGS IS TO:**

- Discuss what's been accomplished so the client is aware of progress.

- Discuss what's standing in the way of taking next steps. Are you waiting on something from the client, or a third-party vendor?

- Explain next steps. What's coming up?

- Discuss changes in scope. Is scope creep affecting timelines and budget? Or is everything on track?

Setting regular status meetings helps prevent interruptions and keeps you, your team, and your clients on track. Your clients will be much happier. Plus, they'll stop interrupting you at random times because they already know the status, the expectations, and when they'll talk to you next.

# Project Management Tools

Utilizing the right project management tool for your situation is crucial to reducing chaos and creating a repeatable process.

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## Email is **not a project management tool.**

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If you're using email to manage your projects, it's too easy for requests to fall through the cracks. You can't assign tasks to people on your team. And there are no clear next steps. Whichever tool you use, it will be *much* better than trying to manage your projects through email.

### SOFTWARE RECOMMENDATIONS

Here are a few project management software suggestions.

**Asana** or **Basecamp** are both very good options as entry-level software choices. Asana has a limited free version. Basecamp allows you to have 1 free project.

**Teamwork.com** is much more advanced. It combines workload features, time tracking, invoicing, Gantt charts, Kanban boards, and more. However, Teamwork has so much capability, it can be challenging to learn easily and that's why we don't recommend it for entry-level. It allows 2 free projects forever.

All 3 provide 30-day free trials.

**teamwork**.com

*We are the #1 Accredited Teamwork.com Partner in the US.*

# Software Tips

It's one thing to have a tool. But you still need to know how to use it, and how to use it well within a system that works for you and your business. At the very least:

**1**    **Each client will need its own project within the software.** If you work with clients that need more than one project, separate by project to keep information in its own place. Make sure that confidential information is shared only with the correct people.

**2**    **Your tasks need dates and deadlines.** You can't just hope that you get to the end of a project. You need to schedule it in detail, including specific dates and deadlines for each task and milestone.

**3**    **Every task needs a person assigned to it.** You should assign one person who is responsible for completing each task by the assigned deadline. Make sure you include milestones on something really big, rather than setting deadlines for each individual task. So if you have 15 little bitty tasks to meet one milestone, those might be subsets under that bigger milestone.

# Software Setup

It's important to understand how to use your chosen software tool, but most small business owners have difficulty setting up their software on their own. I often hear that software tools "don't work," but this is because the tool isn't set up based on how the person works. The tool won't work automagically. If you don't know how to set up the software, find someone who can help you. You can **contact us,** since this is our area of expertise. But no matter who you choose to help, make sure that you're getting help and not trying to do it on your own.

# Managing Change

Setting client expectations is crucial to successful project management. If you're not setting strong boundaries and expectations, it's almost too easy for clients to take advantage of your time and resources causing massive scope creep.

### THE SCOPE IS THE SCOPE.

You wrote the scope clearly in the proposal, and everything going forward is based on that scope. For example, if the scope changes, the timeline needs to change. If scope and time change, your price also probably needs to change. What's important is that you're talking about all of these changes with your client on a regular basis. Remember those status meetings?

### HAVE CLEAR, CONCISE COMMUNICATION WITH CONSEQUENCES TO YOUR CLIENT.

Your role is to guide your client and to facilitate the project. If you ask a question, it's your responsibility to get the answer. If you've been waiting on your client to proceed for two weeks, did you ask them again? Did you explain the consequences that if you don't have answers by a specific date, you can't deliver on time? It's important for your client to feel a sense of urgency. Make sure you're conveying the whole story.

### GIVE CLIENTS A WAY TO DREAM.

If a client comes up with a great idea, saying, "No, that will cost more money and take more time," can put pressure on your relationship. Instead, say it in a positive way. "Hey, that is a brilliant idea. Let's put that on our wish list and we can address it after we're done with this project." Note the difference in tone. You let the client know the ideas are being heard and you've made it clear when you can address it. This approach encourages them to keep the ideas coming while they're working with you. Plus, when you get to the end of your project, you have a wish list of ideas to help you build ongoing projects with your client.

# Setting Timelines

The easiest way to build timelines is to start from the end — when a project is due — and build backward. Make sure you leave some squishy space for all those things that you don't expect, like changes to scope, vacations, or illnesses.

You can schedule projects forward if there's no required due date. But *everything* — including internal projects — needs a schedule, even if it doesn't have a specific due date. Otherwise, it won't get completed.

Once you have deadlines, make sure you're meeting them. Or, communicate why you're not *in advance.* Obviously, if things need to flex and you can keep it in the overall scope, that's fine. Just make sure you're telling your client what's going on so that they're aware.

Include all of the major steps in your project plan. Also, make sure to share the schedule of those steps with all the players before you start. You want your whole team and the client's team to know the plan, to make sure everyone's schedule is in sync.

Now you understand what it means to systematize your process and how to do it, and how project management can help you reduce the chaos in your business.

# 3. Limit Your Interruptions

Make sure your day doesn't get thrown off track by managing interruptions. Calendar blocking, or calendaring, is an excellent way to reduce interruptions. Calendaring is making Tetris®-like blocks on your calendar to schedule everything — personal obligations, recurring business tasks, and even travel time for appointments. It helps you prioritize your work and focus on only one task at a time.
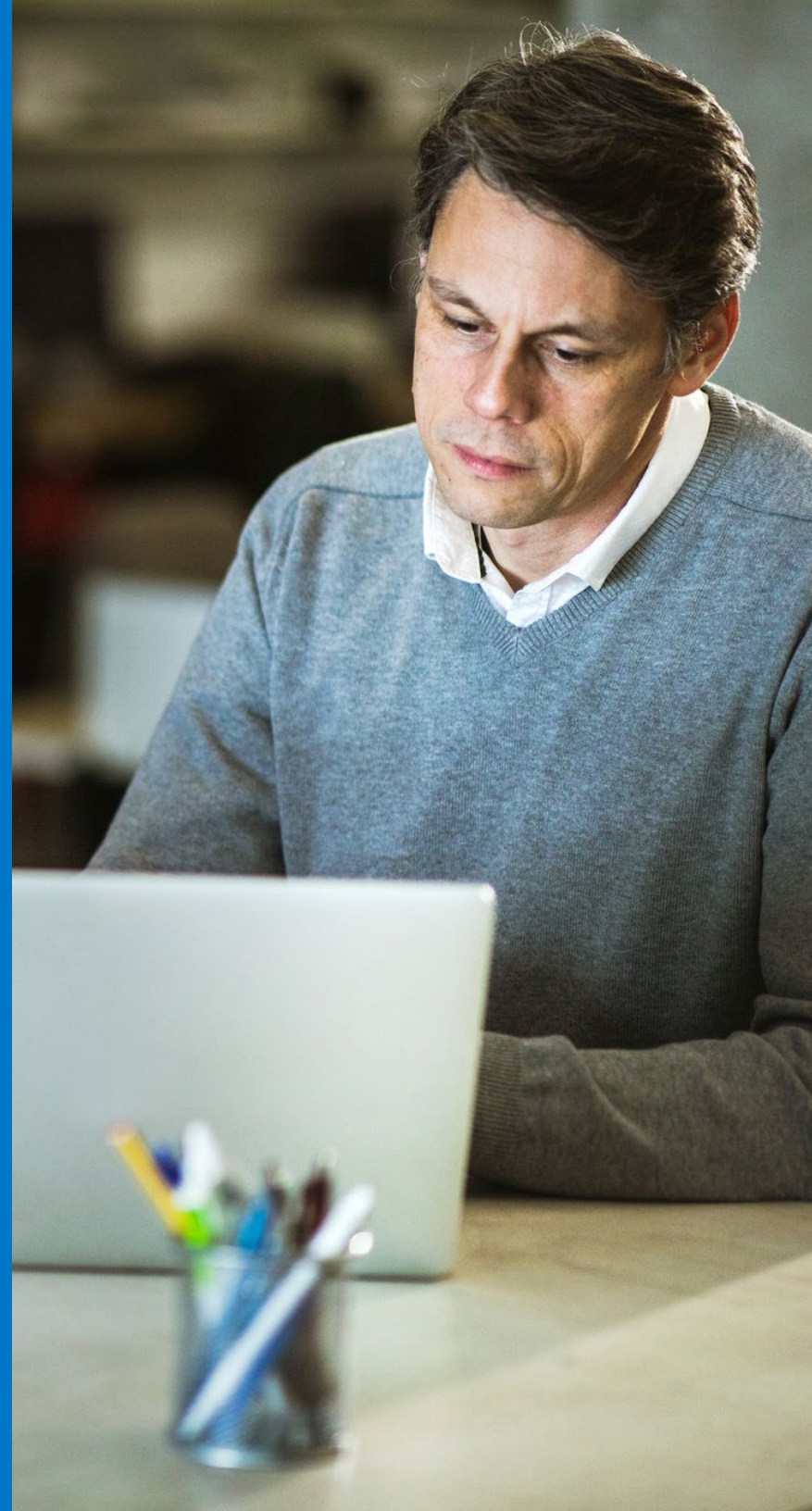
# Calendar Blocking

## PERSONAL

When you're calendaring, block time for your most important personal tasks first.

For example, do you go to church on a certain day or time? What about family appointments? Your kid's soccer game? If you're single, schedule social events ahead of time. Get your personal events on your calendar first and make everything else fit around them. Otherwise, we all know that work will just take over!

Of course, you need to take care of your health, too. From exercise to taking a break, calendar blocks help. When I first started my business, I kept forgetting to eat lunch. So now I have a lunch calendar block that reminds me to get up and eat something.

## BUSINESS

After blocking off your personal priorities, block off your business focus time — time you're going to work *on* your business and not *in* it. You might not be able to carve out time every day for this, but make sure that you're blocking time two or three days a week.

Calendaring is also helpful for staying focused on client projects. If you land a 40-hour project due in a month, block two hours a day for it. Not only does this help keep you focused, it's an effective visual clue when there's a capacity for more work.

**Read more about [managing your time by calendaring.](#)**

# Email

What's everyone's most common interruption? Email is something that we all get sucked into. And it feels productive, even if it's not. Schedule specific times of the day to go through email and be prepared to make quick decisions for each inbox item.

**5 DECISIONS TO MAKE ON ANY EMAIL:**

Do you file it?

Is it junk?
*(Unsubscribe and delete!)*

Should you flag it because it's going to take a while to consider?

Do you delete it?

Answer it quickly.

Go through your email quickly with those five questions top of mind, and then you'll have an empty inbox after every review.

All project emails should be going through your project management tool, preventing you from managing projects in your email.

Set boundaries with your client by scheduling outgoing emails to go out only during work hours, and setting up automatic responses. If you don't check your email except at 10 am and 2 pm, you can have an automatic response that says, "I check emails at 10 am and 2 pm. If this is an emergency, contact somebody else/call support/I'll get back to you later."

If you're a Google user, Gmail comes with a default tool for scheduling emails later, as do many email clients and CRMs.
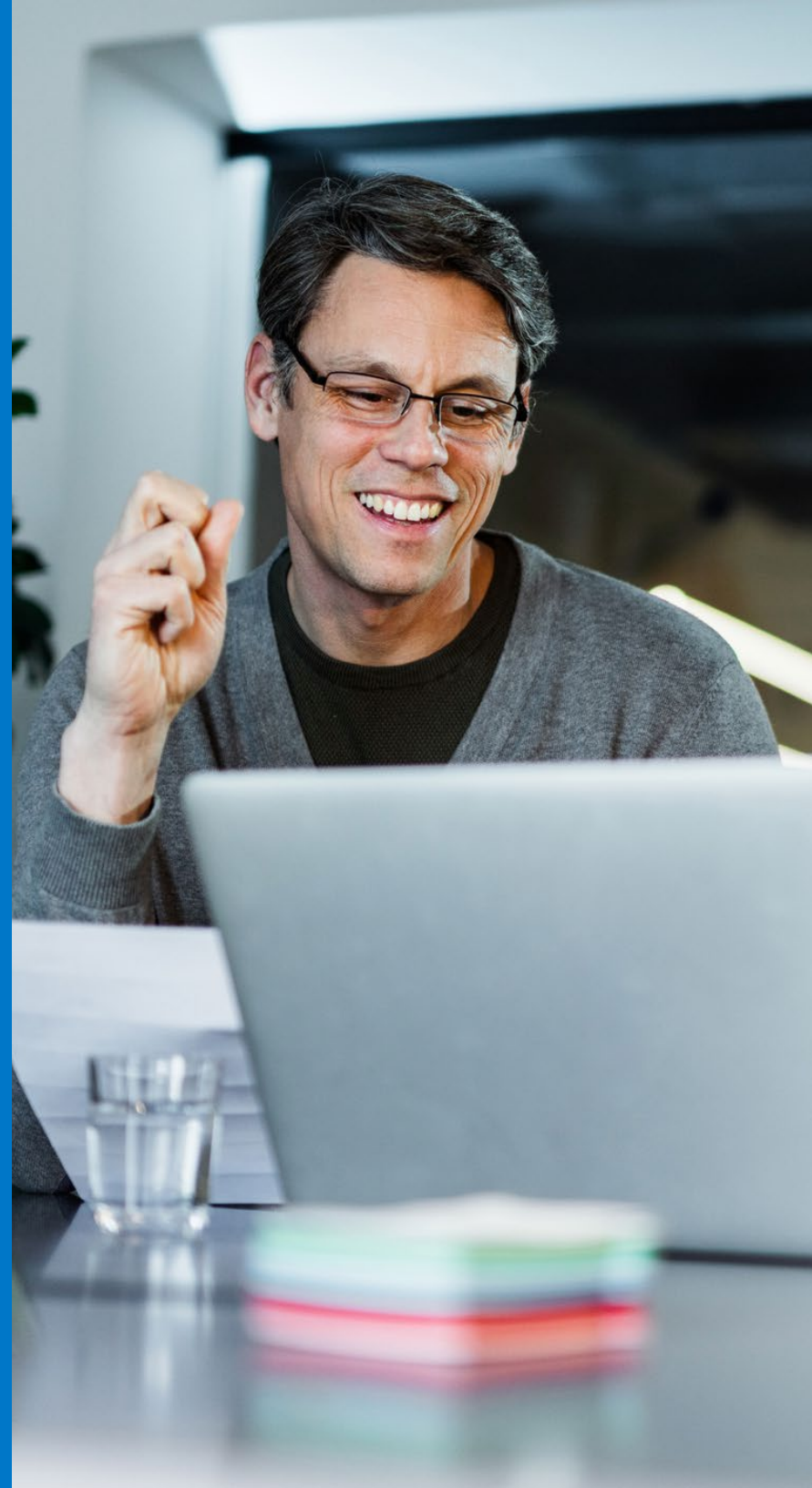
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# Ready to reduce chaos in your small business?

Beyond the Chaos helps overwhelmed small business owners simplify their operations and manage their projects so they can focus on growing their businesses and getting their lives back.

Get three built-for-you recommendations using our free audit.

**AUDIT YOUR OPERATIONS** ▶

"I just wanted to let you know after simmering on our discussions last week I am so excited.

**Your coaching, questions, and advice have given me a sense of calm and confidence that I haven't felt for a very long time.** I came in to work today and didn't immediately get that feeling of anxiety and apprehension over what the week had in store. There is a plan to make things better and goal to push towards!

The experience so far has me invigorated once again to tackle the challenges ahead, so thank you for **the jolt that is shaking off the vines I felt were holding me down."**

SALLY SCHOONOVER, DIRECTOR OF CUSTOM DEVELOPMENT, PRODUCTIVE COMPUTING, INC.

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Susan Fennema is the Chaos Eradicating Officer (CEO) of Beyond the Chaos, a consultancy that helps small business owners—especially in project-driven, service-based industries—break free from daily operations to scale their businesses and reclaim their personal lives.

With over 30 years of operations and project management experience, Susan has guided more than 250 small businesses through structured delegation, streamlined internal systems, and team accountability. Susan's practical, no-nonsense approach resonates with business owners who are overwhelmed by their success, helping them build resilient businesses that don't rely on their constant involvement.

She brings an empathetic and grounded voice to operational strategy, making complex ideas easy to apply in the real world. Based in McKinney, Texas, she enjoys cooking multi-course dinners, cheering on Texas A&M football, and watching Blackhawks hockey with her husband, Craig, and their dog, Shelby.

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