

Effective Strategies for Automation



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About the Author

Eric Mulford is an entrepreneur living in USA who loves sharing knowledge and helping others on the topic of Business Communication.

Eric is a passionate person who will go the extra mile and over-deliver.

"I believe that knowledge is capable of creating power. Knowledge comes from understanding which can only take place after the complexity is removed. Everyone should improve themselves and/or business, no matter what stage in life they're in. Whether it's to develop a better mindset or to increase profits. Moving forward is key."

If you would like to learn more from Eric, please visit: ericsaid.com

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Success and Freedom

For many small business owners, there is a considerable gap between what they thought it would be like running their own business and what it's really like.

Like many business owners, you may have hoped that finding success would bring you the freedom to work on your own schedule and obtain a level of financial security that you didn't have in your previous job.

Unfortunately, you've probably experienced the exact opposite. More often than not, you are likely tied to your computer and phone at all hours of the day, struggling to make ends meet and spending all of your time doing everything else other than what fulfills you.

The problem that most entrepreneurs face is that they tend to apply their hard work to the wrong tasks and are fundamentally off base as to what it takes to build a successful business.

You will never achieve your vision of freedom and financial abundance by answering the phone, handing out business cards, or working long hours. These tasks are doing nothing more than creating a self-employment job, not a business.

The answer to this problem is working harder on your business, not in your business. The way to accomplish this is by developing and implementing systems to handle the mundane, but essential tasks, that keep your business running.

By building systems, you're creating a company.

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How Systems Will Benefit Your Business

Implementing business systems is one of the best things you can do for your company. Imagine owning a bakery without having a system in place for baking cookies. Every day, the cookies would come out differently.

Some days, they'd be great, with the perfect combination of ingredients and time in the oven, while sometimes they might turn out dry and burnt. Your customers wouldn't know what to expect and wouldn't trust your business to provide them with a consistent experience.

Systems are Predictable

To be consistent with the delivery of your products or services, you have to have a system in place that allows you to complete the task the same way every time. Without these systems in place, your business will be unpredictable, resulting in poor customer service and a loss of trust by your customers.

Many small companies have already built consistent systems naturally out of habit, but they've failed to document them, leaving their processes unpredictable.

Systems are Delegable

Until your business has clearly documented policies in place, you are limited to three possibilities:

1. Doing all the work yourself
2. Being frustrated that the work isn't being done correctly
3. Being held hostage to an employee who doesn't complete the task successfully

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When you have clear systems in place, you can quickly train someone who has the skills needed for the job and provides them with clear expectations. Systems guarantee that the work will be completed the way you want it, every time.

Systems are Measurable

When tasks are completed the same way every time, they become measurable. Creating detailed systems works for every kind of business.

Going back to the example of the bakery, if the cookie recipe was detailed enough and the baker had all the skills or experience needed, you could expect them to make the cookies the same every time. You'd also know how many batches of cookies could be made in a day, how many people walk through the door, and how many cookies you sell on average in a week.

Systems are Improvable

When you can measure the details of your business, you can make regular improvements. You might know that your current sales presentation inspires 30 percent of those who hear it buy your product.

With this knowledge, you can work on a new style of presentation, and measure the results to determine whether the changes that were made were an improvement over the previous presentation style.

You can continue to try to improve your presentation by experimenting with different aspects to make a much more effective presentation.

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Systems are Scalable

Once you've developed systems that are predictable, measurably working and clear enough to delegate, doing more becomes as easy as adding more resources. If you want to sell more cookies, hire more bakers. If you're going to manage more leads, hire another salesperson.

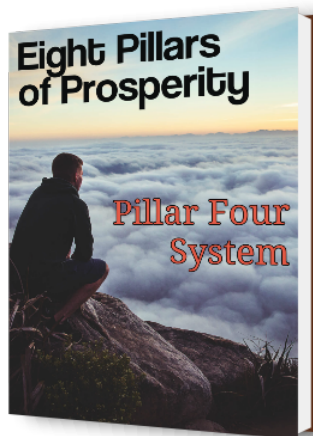
Systems Add Value

Systems will add enormous value to your business in the eyes of investors and prospective buyers. Before investing in a company, they want to know that the viable business you've built will remain so, even if you leave.

They want to see that there are easy-to-follow systems in place that can be used to train new staff and continue running the business.

Note: In the Book the Eight Pillars of Prosperity by James Allen the Fourth Pillar is Systems. I've extracted that pillar along with my personal notes for your benefit. Click on the link below to get your copy.

Pillar Four - Systems for Success



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Where to Start

While the value of systems is apparent, where you should start may not be. If you are like most small business owners, you agree with the idea of systemization, but you get overwhelmed by the prospect of making it happen.

Like most small businesses, your business probably contains dozens of individual processes that are routinely executed by you and your team.

The idea of writing them all down can be overwhelming.

Completely systemizing your business is going to take time, but the first step is rather straightforward and shouldn't take you too long to accomplish.

Step One: List All Responsibilities of Each Position

To start systemizing your business, you want to create a list of all the responsibilities of each position in your company.

Then you will need to have each employee write the detailed process involved with each of their duties. Letting them provide this input will pay huge dividends when it comes time to implement and execute.

For example, your bookkeeper may be responsible for keeping track of payments, depositing checks, and paying the bills. They will need to write the detailed process for each of those tasks.

It may be difficult for your employees to list exactly what they do all day, much less break it down into steps. If this is the case, have them write down every single thing they do all day, every day for a couple of weeks.

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At the end of that time, they should have a list of their responsibilities that can then be documented in the operations guide.

This process doesn't have to be completed all at once. Here are some places you can start.

- Any task that you need to urgently delegate
- Any role where you need to replace an employee
- Any part of the customer lifecycle that needs improvement

Each system that you develop should detail each step of the process so that any qualified person can complete the task by following the documented process.

While creating and documenting processes can seem like a big time-suck, they will ultimately reduce the time it takes to complete tasks and keep you from continually scrambling to meet deadlines.

Step Two: Systemize your Customer Lifecycle

The next area where you'll need to create systems is your customer lifecycle. This is essentially the map of the most basic business goals; to attract potential clients, convert them to paying customers, fulfill your promise, and encourage referrals.

Each of these stages in the lifecycle will have unique processes and systems.

For each aspect of your customer lifecycle, you'll need to write out the specific steps that are required to be completed every single time.

You need to ensure that these processes are repeatable and scalable. When it comes to systemizing your customer lifecycle, it works best if you complete the process development in the following order.

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- Fulfill – you'll need to be able to deliver a high-quality product and client experience above everything else. So, first start by documenting your systems for fulfillment to determine any areas you can streamline.
- Convert – spend time looking at your marketing processes and determine the areas that need improvement to encourage more leads to be converted to customers.
- Refer and Expand – encourage long-term customer retention by creating systemized upsells, cross-sells, and resells. Also, create a system for gathering customer testimonials and managing referrals.
- Attract – this includes creating systems for advertising, networking, SEO, content marketing, public relations, and other marketing outreach programs. You want to get every ounce of value out of your effort.

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Constantly Improve Your Systems

Using systems to create a culture of constant improvements in your business can ensure that your business will improve over time.

However, knowing the right time to make changes to your systems can be a challenge. Here are four main reasons you may need to update a process.

Something Breaks

Things won't always go the way you plan. This is especially true when you are first starting out with business systemization. When a process is new, or you have a new person in a role, your methods may not produce the results you had intended.

In most small businesses, processes aren't a matter of life and death. If something goes wrong, you can make it right and fix your process. If the procedure was followed and things still didn't go well, it may be time to look at how you can improve the process to avoid errors from being made in the future.

Something Changes

A needed change in a process won't always be as a result of something breaking. Sometimes processes need to be improved because there's a significant change in the business.

For example, if you suddenly have a lot more work, you may need to shift the responsibility of a task from a single person to a team. A change in the process makes sense.

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Other changes that may trigger an improvement in your process are new laws or industry rules, the adoption of new technology, or the decision to do some work remotely.

Something is Learned

As a business owner, you are always looking for new and better ways to do things. Sometimes the ideas you have won't go as planned, so you experiment.

Some things will work better than before, while others won't.

When they do work, you'll need to update your process documentation to reflect what you've learned.

Deep Dives

Sometimes there can be too much of a good thing. Diligent and good-intentioned employees get busy adding to and extending processes to avoid anticipated breakdowns.

Over time something that was once simple and effective can turn into a daunting cluster of nonsense. To prevent overdone procedures, it is essential to step back periodically and see if there might be a better way.

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Automate Your Systems and Scale

Once you've documented all your processes, you can begin automating many of them using one of the various software programs or apps on the market.

Using software to automate several key businesses, marketing, and sales processes will essentially lead your customers through the entire sales cycle automatically while still providing them with the personalized customer service they've come to expect from your business.

It's important to keep in mind that you need to carefully think things through when it comes to automating your processes.

You have to ensure that the system works before you can automate it. If you can, try completing the process manually before you convert it to an automated process.

Once you've determined the ideal method, take the time to map it out. After you've successfully mapped out the process and know that it works correctly, you can then begin to build the system into the automation software.

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Conclusion

Over time, you'll be able to gather all the stats that are required to measure the effectiveness of your processes, so you can continue to make improvements in your systems.

What you'll find is that the more that you are able to automate your business successfully, the easier it will become for you and your team to focus on creating new value for your clients.

By streamlining and systemizing the processes in your business, you'll be able to save time, so you can focus on the essential tasks needed for growing your business.

With stable systems in place, you'll be able to start making more money and continue to build a successful business.

Welcome to EricSaid!

Automation can make your life easier. It can also be a very daunting task. Many entrepreneurs are resistant to automation because they fear a loss of control or they think it's a distraction from their real mission. Neither should keep you from making your life easier. James Schramko says in the book **Work Less Make More**, *"an effective work day is about energy management, not time management."* Use automation to manage your energy so you can make more.

[Let's Talk About It](#)