

# ONLINE BUSINESS SYSTEMIZATION



## GUIDE 2:

Start Here-List Your Most  
Recurring Tasks

# Start Here: List Your Most Recurring Tasks

Whether you already own an online business and find yourself constantly exhausted from the daily work, or you are planning on opening an online business in the future, there is still plenty of time for you to get into the swing of systemizing your business. Once you start working on the steps outlined in this guide, you may begin to realize that many of them are simply common sense.

## Step One: Identifying Recurring Tasks

To start systemizing your business, you need to begin by listing all the general functions that you do both daily and through the course of the week.

It doesn't matter if you are a brick and mortar business, an online business, or a hybrid business that involves an Internet presence as well as a physical site. Here are some of the more common tasks that will apply to every business.

### ***Accounting***

When it comes to your business's income and expenses, you have to create some sort of process for keeping track of what comes in and what goes out.

Having business systems in place for your accounting tasks will allow you to ensure that you are profitable, as well as making sure you have the appropriate records to back up your tax filings, that you have paid your vendors, and that your customers are paying you within your set terms.

It is also essential to make sure that your paying your employees on time and have the right amount of taxes being deducted from their pay.

This is one of the systems in your business that you have to keep a close eye on. However, this doesn't mean that you have to do the work yourself.

Financial management systems will allow you to keep track of everything from tracking credit card purchases to invoicing clients, to following up on past-due accounts. Here are some of the other accounting systems that can be systemized.

- Purchasing
- Tracking credit card purchases
- Accounts payable
- Accounts receivable
- Deposits to the bank
- Cutting checks
- Payments on taxes
- Profit and loss statements
- Invoicing
- Daily cash out
- Petty cash
- Employee expenses
- Payroll

Putting these systems in place will help to prevent employee theft and allow you to have a clear picture of your business's numbers. They will allow you to control your purchasing and ensure that you sign-off on each decision that is made.

## ***Administration***

Somebody has to ensure that the day to day tasks are being accomplished. Depending on the size of your business, this may involve a central manager or supervisor, or several managers who oversee one or more departments.

Administration is an essential area of your business to systemize because of the high turnover rate that most administrative roles see. Implementing a series of systems can help to reduce training time and keep you from having to explain to new hires how the phone needs to be answered every time a new employee joins the team. Here are the administrative tasks that should be systemized.

- Opening and closing procedures
- Phone greeting
- Mail processing
- Office maintenance
- Filing
- Paper management
- Document production
- Inventory management
- Order processing
- Creating orders

## ***Marketing***

No matter how good your products are unless people know that are around, there is no chance of ever getting your online business off the ground. Marketing involves creating strategies, learning how to reach niche markets, how to position your product, writing compelling marketing copy and general marketing collateral.

Marketing your business is probably one of the areas where you spend most of your time. You are most likely focusing your efforts on generating new leads and getting more people to call you. These efforts can be efficiently systemized and delegated to other members of your staff. Here are some other marketing systems that you can systemize.

- Promotions
- Marketing calendar
- Advertising
- Direct mail
- Advertising creation system
- Social media
- Content creation
- SEO systems
- Newsletter templates

You can use systemization to create simple systems for your business's primary promotional efforts. Any of your team should be able to pick up your marketing manual and implement a successful email marketing campaign or create a purposeful advertisement.

## ***Sales***

Many people tend to lump sales and marketing together. However, to create a truly systemized business, they must be treated as different functions within the company. While marketing is about getting the general word out about your business, sales are about following leads and converting prospects into paying customers. Some of the sales systems that you can systemize are as follows:

- Referral program
- Customer retention
- Sales procedures
- Lead generation
- Lead management
- Sales script

## ***Technology and Data***

It is almost impossible to operate any kind of business without having reliable resources in place that can help you keep your website functioning correctly, your servers running, and your workstations from losing critical data.

Your business needs to have clear systems in place for managing both your paper and electronic organization to ensure that your sensitive business information is protected and easily accessible.

Implementing data management systems in your business will help you stay organized. When everyone on your team knows where information is

supposed to be stored and how it should be handled, you can reduce enormous stacks of paper from forming around the office. Here are some other data management systems that can be systemized to ensure your business continues to run.

- IT management
- Data backup
- Computer repairs
- Electronic information storage
- Client files
- Project files
- Point of sales system
- Financial data management

You need to ensure that your data management systems include a data backup system. This will ensure your data and business are protected in the event something happens to your server or computer software.

## ***Human Resources***

Even if you only have one other person involved in your online business, someone has to make sure that you are functioning within the guidelines and regulations that apply to the kind of business you are running.

Managing HR policies and procedures can get very involved, so it is essential that this particular function is controlled by someone else who has an eye for detail and who can assimilate a lot of data.

Along with creating systems for hiring, firing, and training employees, your HR systems will include documented processes for the following:

- Recruitment
- Retention
- Incentive programs
- Employee reviews
- Employee feedback process
- Employee training
- Professional development
- Ongoing training
- Job descriptions and role profiles
- Uniforms and dress code

Employees with clear expectations and clear structures are happier and more productive in their positions. Establishing a clear training manual will save you the time of training each new staff member.

## ***Communication***

Communication is an essential aspect of any business and is often one of the most time-consuming pieces. Sales letters, fax cover letters, internal memos, newsletters, and reports are all types of communications that need to be created on a regular basis by different people within the organization.

Most of the time the communication systems that you use in your business aren't much different from one to the next. However, each one is created by a different person, from scratch. Your communication systems provide a



massive opportunity for systemization. Systemizing these communication systems ensures that you will have consistency in your business.

- Internal memos
- Fax cover template
- Letterhead
- Team meeting agenda
- Internal emails
- Newsletter templates
- Sales letter templates
- Meeting minutes
- Reports
- Internal meetings
- Scheduling

## ***Customer Relations***

Another critical area that you need to consider systemizing is your customer relations. This includes everything that a customer sees and touches in your business, along with the interactions they will have with your staff.

Establishing a system for your customer relations will ensure that any new employees will understand how your business handles customers. This allows you to maintain a high level of customer service. These customer relations systems are perfect for getting your business systemized.

- Incoming phone call script
- Outgoing phone call script

- Customer service standards
- Customer retention strategy
- Customer communications
- Ongoing customer communication strategy
- Customer liaison policies

## ***Purchasing***

No matter how lean you run your online business, you will be required to purchase items for your business from time to time. While you may only be buying general office supplies, a software program from time to time, or promotional materials, having a process in place can ensure that you never run out of the items that you need. Some of the purchasing systems that you can systemize include:

- Inventory
- General supply orders
- Shipping materials
- Evaluating pricing
- Policy compliance
- Filing paperwork

It is essential to have someone in your company that is capable of establishing relationships with your vendors and can maintain the rapport to ensure that you are getting the best prices on the goods and services that you are purchasing.

Your initial list needs to encompass all of the essential functions that are related to operating your business. Once you have the list in place, you can begin the next step of the process.

## **Step Two: Organizing and Prioritizing the Functions**

Once you've identified all the recurring tasks in your business, it is time for you to organize and prioritize those functions. Depending on the size of your business, you might be able to combine some of the tasks into a single, general category, as long as your business remains relatively small.

It's also important to remember that you can always split categories later on as it becomes necessary. Here are some examples of how you can prioritize your essential business functions.

### ***Product Development***

Before you can even start a business, you need to have a core product or service that you can offer to potential customers. This makes product development one of the most critical functions in your business and thus should be placed at the top of your priority list.

Product development is likely to continue to remain high throughout the course of business since you will need to continually improve and refine your product over time for it to stay competitive in your market. Coming up with new products that will compliment your core line will also be a function that you will have to perform throughout your time in business.

## ***Administration and Accounting***

For small businesses, combining the administration and accounting functions makes sense. You can hire a single office manager who can take care of the day to day clerical tasks as well as posting credits and debits to the books. As your company expands, you can split these two functions into separate teams. Before you can start selling your product or services, these two areas of your business must be structured and in place.

## ***Tech Support***

You can't successfully run an online business if you don't have a functioning website or if you have problems with your equipment. Having someone who knows how to build and manage a site and keep your equipment running is essential to have in place before you make your first sale.

## ***Sales, Marketing, and Customer Support***

When you are first starting your online business, these business functions can be combined and handled by one or two people. Over time, as your business gets off the ground and continues to grow, you will need to split these functions into their own department and have separate policies documented for the processes that go along with each task.

After you've analyzed your list and prioritized the functions according to their importance and need for getting your business up and running, the

next step is developing the policies and procedures that will be essential for keeping your business running, even when you aren't in the office.

## **Step 3: Developing Policies and Procedures**

When you have your priorities in order, it's time for you to begin developing the policies and procedures that will be at the core of your business. These policies and procedures will keep each of the essential functions of your business running smoothly so you can focus your time and effort on growing your business.

It is necessary for you to keep in mind as you work through this step, that even if you are combining several functions under one umbrella initially, that each of these functions must be clearly defined with their own specific processes and responsibilities.

Developing policies and procedures is nothing more than creating a logical process that can be documented in a training manual. They must be as relevant for a team of three as they would be for a group of three hundred. Here are some examples to help you begin crafting the procedures for each of the essential functions of your business.

### ***Accounting***

You should have policies in place that include guidelines to how frequently posting should be done to Payables and Receivables, when taxes should be determined, how to handle employee payroll, and how to track expenses.

## ***Administration***

The administration policies and procedures should include guidelines on how to schedule employees, how to draft letters and general correspondences, how to arrange and maintain the filing system, booking travel for department personnel, and ordering office supplies.

## ***Sales, Marketing, and Customer Support***

The sales, marketing, and customer support departments will need to have clearly defined instructions on how to interact with the public. Marketing will need guidelines for how to create compelling ads that appeal to consumers while the Sales and Customer Support departments will be representing the company when approaching prospective customers and taking care of existing ones.

## **Step Four: Documenting the Processes**

For your business systems to work correctly, they need to be clearly documented so that there is no opportunity for miscommunication or confusion on what should be done in any given situation. While recording your processes and procedures can be intimidating, there are some excellent resources for managing this.

Your new hires, presumably, will have some experience in the area where they will work. Draw on this experience to help you create the policies and procedures for your business.

To cut down on the time you spend writing down the processes, turn to templates and samples found on the internet or obtained from other companies. There is no point in your spending your valuable time reinventing the wheel. A lot of the information that you need has already been written and can be customized to work for your company with minimal effort on your part.

If you genuinely don't have the time or resources in your company to help you document your policies and procedures, you can always hire a business consultant to help you create a training manual and a workable employee manual. The money you spend on this type of service will be well worth it in the long run.

## **Step Five: Implement the Processes**

Once you have started documenting your processes and procedures, you'll want to take them for a test drive. Start implementing the processes to determine if the basic structure is sound.

Don't be upset if you run into bumps along the way, no business, no matter the size, gets it completely right the first time. As you do a test run on the processes, consider whether the process has the potential to be tweaked along the way to ensure that your company is capable of running smoothly when you're away.

As your company grows, you will find it necessary to add positions to various departments, adjust policies and procedures to accommodate new laws and regulations, or create new departments by splitting older ones.

If your primary system is sound, these new developments in your company will be relatively painless to deal with and won't require you to overhaul the way you do business entirely.

## **Step Six: Diagram the Flow of Your Business**

It isn't enough for you to merely identify and prioritize the functions in your business. You also need to ensure that there is a logical ebb and flow between each of these essential areas.

While this may seem redundant once you've figured out what each department is supposed to do, you can think of it as creating the jewels that go into the necklace.

They may be beautiful in their own right, but if they aren't correctly linked, nobody can wear them. Here are some ideas to help you with the diagramming and definition of the communication flow within your business.

- Start with diagramming how things flow through each department. For example, a new customer order begins with Sales, makes its way to Order Processing, then finds its way to Shipping, and finally ends with billing.



At some point, Customer Support will need to be involved in following up and making sure the customer is happy with their purchase.

- Next, identify who is responsible or accountable for each progression in the flow.
- Evaluate how long it takes for the flow of the order to make its way through the process and determine if any areas need improvement.

Taking the time to diagram the various processes will help you in a couple of ways. First, it will make it clear whether or not the policies and procedures that you have implemented are working correctly.

Secondly, it will help you and your team spot any areas where you can improve communication, more clearly define procedures, and which steps can be streamlined to save you both time and money.

While this may seem like a great deal of work, it is relatively easy to accomplish. The degree of detail and time that you spend developing these procedures will depend on the size and nature of your business.

While some of the steps will be able to be completed in a matter of minutes, others will take days or weeks to accomplish. Building a solid foundation when you are first starting your business will save you a considerable amount of time and money once you have your company up and running.