



## How to STOP Being a SLAVE To Your Business and Transform It Into a Predictable, Profitable, Turnkey Operation!

If you have staff, you are probably familiar with the story of Somebody, Everybody and Nobody...

*“Somebody was asked to do something that was Everybody’s job. Everybody thought Somebody was going to do it, but Nobody did it. When Nobody did it, Everybody asked why Somebody didn’t do it. Somebody said it was Everybody’s job. Everybody said it was Nobody’s job, therefore Nobody did it.”*

Can you relate to that story? If you don't have staff, this chapter will reveal how not having staff is holding you back and what to do about.

### *Why systems are critical to your business*

**The key to profitable growth.** Have you ever seen companies that grow big fast only to discover that more money is going *out* than is coming in? I have. And it is NOT very phenomenal! The bigger you get without systems, the more money is going out the door in re-inventing every day.

**Employees perform better.** When your employees don't have to depend on you to direct their every move because they have a system to work in, their performance goes up.

**Fewer surprises.** Have you noticed that human beings do dumb things? The stuff people come up with sometimes is mind boggling. Like the time one of my clients had an employee that wrecked a company truck. Instead of calling the owner and letting him know, he hid the truck behind his house and didn't show up for work the next day. Of course my client didn't have systems then. Now he does.

Don't leave it to your employees to try and figure out the best thing to do. Have a system.

**Keeps the owner in line.** I don't know about you, but I like to change things, update them, and try something new from time to time. As the owner, you may like to tinker, or you decide which part of the system you feel like using that day. As the owner, you have to be the example and follow the procedures yourself if you want your staff to follow them.

Many years ago, in my service business I went out to do an onsite presentation for a prospective client. I assumed that the client wouldn't buy and did not write up a proposal. Instead, I just quoted a verbal price and left. Sometime later, the prospect called in to have the work done. My salesperson looked high and low for the paperwork and finally in frustration, asked the prospect if she was absolutely sure we had done an onsite consultation.

"Oh yes" she said. "A man drove up in a Lexus, looked around and told me how much it would be!" Of course my salesman knew exactly who she was talking about! Me! The owner. The one who decided not to follow the system that day. And of course there's another lesson there too. Don't judge a prospect. Do the proposal!

If you like to change things around and you have a team, they're confused. Then the customer is confused. When you change something, be sure to communicate it and update the *system*.

**A consistent service experience.** When you have a system, the customer knows exactly what to expect. McDonald's is the "poster child" for systems because you can get the same hamburger in Tokyo as you can in Paducah, Kentucky. It may not be the *best* hamburger, but it's the *same* hamburger. It's *consistent* because they have a *system*.

**Takes less of the owner's time.** The idea behind building systems is so you have more time. If you are "reinventing the wheel" everyday, and there is no system your team can follow, you end up doing everything yourself. Ultimately, you want to streamline your business so you can have more time to pursue your life goals.

As I write this piece, I have been traveling for almost 3 weeks. It's July 4th and my wife and I are at our little beach condo in Florida. My staff knows what to do. They don't need me. We were in Australia for almost 2 weeks and I didn't have a phone with me. My wife asked me about 10 days into the trip "have you talked to your

office?" and I said "uh, no..." "Don't you need to check in with them?" she pressed. "Uh, no... they know what to do. Remember I have a turnkey business". "Oh that's right." she said.

One of my coaching clients built his business from almost nothing to over \$2M per year and he takes 14 weeks of vacation all over the world each year. It can be done. Now, please understand that you don't want to be irresponsible. You still have a responsibility as the owner of that company. You must make sure that your managers are leading properly and that things are being implemented properly.

I liken it to investment property that is managed by someone else. You own the property (and therefore have responsibility), but you don't have to do the day-to-day management.

Another caution is not to exit too soon. I have another client who did not have the right team and although his business was profitable and he was able to travel a great deal, he began to travel continuously and things began to fall into disrepair.

**A saleable business.** Finally, would you like to sell your business for a lot of money one of these days? What if one day you could sell your business and retire on the proceeds. How would that be? I have found that there are two responses to this question. The first one is "*No! I love what I do!*" And the fact is that many times the work we do in our business is a ministry - it's our expression - and perhaps we love the technical work we do (or some other part of the work "in" the business).

If that is your response, you still need systems in your business! Here's why. What if you had to sell your business? A friend of mine has a hereditary kidney condition that will one day take his life. It took his brother's life. As far as he knows, it is inevitable.

The problem is that his current business depends on him! He is a genius at what he does, but it isn't a turnkey system. So, he has been feverishly building another company that will help him reach his most important life goal: Leave his family with the finances they need to live comfortably.

You may not want to sell your business right now. But sooner or later, you will "leave the building" as we all do! Whoever takes over that business will need a system. And if you have to sell it for some reason, you can.

The other response I get to the question "would you like to sell your business for a lot of money one of these days?" is a resounding "YES!" Well, here's the bad news: First, your business isn't worth much if it depends on you. Secondly, an investor (someone who has the kind of money you probably want for your business) doesn't want your 24-hour-7-day-a-week "J.O.B"!"

They want a set of keys.

They want a set of keys that they can take and turn the crank on the predictable, profitable, turnkey money machine that you have created. They want to be able to flip the ignition switch and have it run as good for them as it does for you.

A friend of mine asked his billionaire neighbor (who owns a LOT of companies) for advice. The billionaire business owner said: "Build your business to sell it and then keep it!"

If you are a skeptic, you may think it's a fantasy to have a turnkey business that allows you to travel and do the things you want to do. And you may be the type of business owner that believes you have to be there controlling every aspect of the business and that if you are off at the beach that your employees won't take you seriously.

To the skeptic: I'm living proof that it's possible. And I have helped many people do the same. It is possible. It won't be easy - in fact, building systems in your business will be the hardest thing you ever do in business. That's the bad news. The good news is that once you have a turnkey business, you will have something that very few small business owners have.

To the control freak: If you love running the thing every day and that fits your life goal, go for it! But if you think that is the only way, let me ask you this question? Is Warren Buffet on the floor of the call center at Geico? I don't think so. Phenomenal Leadership is required to develop leaders who develop leaders. Leaders who can run your companies *for* you. Those who can handle the day to day *for* you and *instead* of you.

This acronym sums it up well:

## A SYSTEM

Saves  
Your  
Self  
Time  
Energy  
Money

Here's my acronym for SYSTEMS:

Systematizing  
Your  
Strategies  
To  
Execute  
Management  
Successfully

Everyone has strategies. You may not realize how many strategies you have, but you have specific ways that you do things. You may have intentionally decided to answer your phone a certain way rather than another, for example. That's a *strategy*. There's a certain way you do your work. That's a *strategy*. There's a certain way you advertise. That's a *strategy*.

A system is a group of working parts that are *designed to work together*. Then and only then can you really execute successfully. Then and only then can you really *manage*.

By the way, even if you are a solo operator or an independent professional that works alone, you need systems. There is a specific order of things that works best. Once you find the best procedure and timing, do it the same way each time and your results improve. Once you have tested a number of strategies, you find what works best and duplicate it over and over.

### ***The 5 Vital Components of a System***

If you understand and apply the following components, you can systematize just about anything. Assembling these five components creates the ultimate system. I believe these will work for any type of business or organization.

## The 5 Components are...

1. The Mission
2. The Organizational Chart
3. Job Description
4. Policies
5. Procedures

### *Component # 1: The Mission*

Your company's mission is the unique experience you are delivering every day. It is what you do every day to accomplish the vision. Your mission is different than your vision. Your vision is where you are going. Your mission is how you get there. Many times vision and mission is used interchangeably because your vision is that you are delivering on the mission and by delivering the mission, you reach your vision.

For our purpose of learning together, we will define vision as being more about the goals - the destination - where we are going (remember GPS?). Your mission is about what you do every day, every hour do should have your mission in mind.

For example, the mission of my service company is *to provide the most outstanding service experience ever*. The mission of my training company is *to help small business owners stop being a slave to their business*.

Starbucks mission is *to establish Starbucks as the premier purveyor of the finest coffee in the world while maintaining our uncompromising principles as we grow*. World Famous Pike Place Fish Market became "world famous" by adopting the mission of *treat everyone like they're world famous*.

Notice that each of these statements is only one sentence and easy to remember. An effective mission statement is not some long boring paragraph in a frame on the wall that no one knows. The receptionist sitting ten feet away who sees it every day can't even tell you what it says. The owner who cooked it up in a business planning session with a consultant quickly forgot about it after the conference. Until you simplify it and transfer it into the hearts of your employees and clients, it won't help you.

Speaking of heart, and the reason Mission is the first component of building systems in your business, is a system without a heart is just a lifeless corpse. If you think about the human body, as intricate as it is, without a heart pumping, there is no life. You can have the bones, the flesh and all the intricate systems, but without blood flow, you have nothing.

Some organizations are alive, but that's about all. The next step is to make your mission inspirational. Your mission needs to be unique, meaningful, and engaging so that your employees feel good about delivering it and your clients get an experience that makes them feel good.

Whether you're a doctor or you sell a product online, what is the unique experience you want your clients, members or patients to *feel*? A mission is not a slogan necessarily, it's what you actually *deliver*. But you *do* want to teach it to your clients so they know what they are getting. This helps you attract the kinds of clients you want. See more about that in the chapter on phenomenal marketing systems.

For example, the mission of my service company (to provide the most outstanding service experience ever) means we stand out from the crowd. The client gets a "wow" experience that makes them feel important. It makes them feel special. It makes them happy! Zappos created a phenomenal online business by making customers *HAPPY!*

Instead of just providing a functional service, we offer an outstanding, engaging, meaningful service experience that leaves them with their jaw on the ground. No Our goal is to leave them with the feeling that no one cares like we do. No one has *ever* provided that level of experience.

The first thing a new hire learns is our mission. In fact, they learn it in the interview process and agree to help us provide it before we even hire them. We have a 5 page document on the mission that is the first part of the new hire training manual. It goes over what the most outstanding service experience ever means. It talks about going over and above being on time and doing a good job. Those kinds of things are below minimum standard.

The document teaches that success is only achieved when the client *feels* they got the most outstanding service experience they have *ever* received from *any* service provider in any industry! It doesn't matter if we did everything we were "supposed"

to do, we didn't accomplish the mission unless we can clearly see that they feel that way.

The Ritz-Carlton does a phenomenal job with this. They have a credo card that each one of their "Ladies and Gentlemen" carries. It has their credo, motto, and three steps of service on it. Read all about it in my friend Joseph Michelli's book, *The New Gold Standard*.

In my membership program, our mission is *to provide the most phenomenal community experience ever*. We found that when people feel like they belong to an organization that shares the same vision and values, they feel accepted, appreciated and supported.

When they feel accepted, appreciated and supported, they implement! And the #1 reason that small business owners don't grow is F.T.I.(Failure To Implement)! We move them from being a slave to their business into a community of supporters, encouragers and cheerleaders, on to implementation, infrastructure and significant business growth.

### *The Benefits of a Clear, Compelling Mission*

- **Your mission reveals who your target market is.** Does everyone want the most outstanding service experience? No, some people want the lowest price. Does everyone feel like a slave to their business? No. Does everyone want the finest coffee in the world? No. If you try to be everything to everyone, you won't be anything to anybody. See the chapter on phenomenal marketing systems to see how mission affects marketing.
- **Your mission dictates what kind of marketing you do.** Does every kind of marketing attract the target market that wants what you want to deliver? No.
- **Your mission engages your prospects and clients.** Your mission makes it clear what you are actually providing - an experience, not just a functional product or service.
- **Your mission helps your staff make the right client decisions.** This is possibly the biggest reason for a mission. Although your goal in building systems is to document every step that happens in the business, the fact is

that we live in the real world and your staff must be empowered to make decisions when the lines are grey. How does your employee make that decision? With the mission in mind. Obviously we can't deliver the mission without making a profit (an important part of the vision), but the mission helps them make the right decision.

- **Your mission determines what image you project.** Your mission will determine how your materials look, what kind of dress code you have, what kind of facility you have, and many other decisions regarding the image of your company. For example, if my target market is corporate America, my image has to be corporate. If my target market is small business owners, it can be a little more down to earth, as they want to see authenticity.
- **Your mission helps you adopt the right customer service policies.** One of the biggest disconnects in small business is when the mission doesn't match the message. If the message says you provide the most outstanding service experience ever, but you set policies that limit your staff from actually delivering that, you hurt the brand.
- **Your mission leads you to the right procedures and training processes.** Your people can have heart as big as Dallas, but if they don't have the training and the systems to work with, they can't deliver even if they wanted to.
- **Your mission tells you what kind of people you should hire (or not).** If your people aren't passionate about the mission, you are going nowhere fast. As Jim Collins says in *Good to Great*, "get the right people on the bus and then figure out what seat to put them in". More about this in phenomenal leadership systems.
- **Your mission is the focus of coaching and discipline.** When a team member misses the mark and you have to take them into a coaching situation, the entire conversation is about mission, vision and purpose. This takes the conversation away from "me vs. you". It's about the mission. This takes the negative emotion out of the equation.

Once you have a mission that you believe in, you can use it to make every decision in your business. What kind of equipment should we use? In the book *Onward*, Howard Shultz shares that when Starbucks got off-track, the Espresso machines

that were chosen to cut expenses actually killed part of the experience - the aroma!  
What kind of marketing should we do? What should our uniforms look like?

You can be tempted to do things that keep you from accomplishing your mission because you are trying to save money or you're growing so fast that you lose sight of what got you there. That's what happened to Starbucks.

In the book *Onward – How Starbucks Fought for Its Life without Losing Its Soul*, Howard Shultz shares how they regained their brand after losing their way. It's a powerful story about the importance of mission and brand.

When you have a mission that is understood, you can “check” every decision that is made.

A clear mission helps you “rally the troops” and gives you a context for coaching. When an employee doesn't follow procedure, you can simply tie the correct behavior to the “why” behind the procedure -- which is the mission. Instead of your employee just thinking that you're mad at them or you don't like them or whatever emotional issue they have, they understand that it's about the mission.

They understand that the mission is best for the client. Speaking of clients, be sure to communicate your mission to your prospects, customers and clients, as well. At our company, our UEP™ (Unique Experience Proposition) is our Mission Statement. This is what the client is buying and this is what my staff provides.

What a thing of beauty!

The reason the mission is the very first component in building systems is we must know what it is that we are trying to accomplish each day. While you are getting your procedures in place, your team needs to know what the mission is so that they can make the right decisions. You also need your mission in place so that you can create the right procedures.

By the way, you may have heard people use the words “vision” and “mission” interchangeably. The difference between vision and mission, by the way (in my mind's eye), is this:

Mission is what your business is trying to DO each day. In other words, every time we pick up the phone, it communicates “the most outstanding service experience ever” -- or it doesn't. Simple as that.

Vision is what you want your business to LOOK like. In other words, your vision is what you get when you reach your goals. We want to do X number of dollars in business, X number of clients, X dollars in profit, etc. We want to have X number of trucks, staff, etc.

Finally, your mission is supported by your VALUES or what Starbucks calls “guiding principles.” These values help us live out our mission each day. My company has five values that we live by and that we communicate to our clients.

If we live out the values, we accomplish the mission. Simple as that.

To create your own mission statement, think about what you want the client to get. What do you want them to *feel*? Put together a simple but meaningful sentence and begin to communicate it to your staff. Post it on your materials, your walls, and every place it can be visible to remind you, your staff, and your clients what you are actually selling.

### ***Component #2: The Organizational Chart***

Owning your own business can be overwhelming because of the number of “hats” you have to wear. Someone not only has to do the "technical" work of the business, but someone has to market, someone has to go on sales calls, someone has to do the bookkeeping, someone has to order supplies, someone has to fix the equipment, and the list goes on.

If you are a larger company and you have people actually doing some of these things, you are most likely overwhelmed as you try to “manage” them and end up being involved in many things that you don't want to be involved in (and probably shouldn't be).

You are involved in too many areas because you haven't learned the skill of leadership and systems. How do you ever get over this? You need a vision. A road map – a clear picture of the business. A great tool is an Organizational Chart.

*The Organizational Chart of most companies looks like this...*

Leadership	MARKETING	SALES	OPERATIONS	ADMINISTRATION
Directing	You	You	You	You
Managing	You	You	You	You
Doing	You	You	You	You

No wonder you're overwhelmed! You're in every box!

So, how do you get organized? You begin by understanding the 12 vital functions of the business. Every one of these functions is vital to be phenomenally successful in your business. And if you want a turnkey business, all of them are absolutely crucial.

Does someone have to plan the business to be more successful? You bet. That's the role of what I call the "Director." Does someone have to manage the business? Absolutely. Someone must make sure that all of the things that are supposed to happen actually get implemented. I call that the "Manager."

And, of course, someone has to actually do the work of the business. The good news is that it doesn't always have to be you. And men, your wife is not the only one that can answer the phone and do the books. She needs a life, too.

So, understanding the three levels of Leadership (Directing, Managing and Doing) gives you a picture of how to separate and organize the major functions. Then there are what I call the Four Pillars of a Phenomenally Successful Business: Marketing (everything you do to attract prospects to your business), Sales (everything you do to convert the prospect into paying customer), Operations (everything you do to service your client), and Administration (everything you do to track results).

More on these areas in the next chapter.

### *How to Use the Organizational Chart*

- 1. Directing** is casting the vision for the company, planning, and leading the managers. The director knows what the end result looks like.
- 2. Managing** insures that the wishes of the Director are carried out. This involves training, supervising, reporting, and overseeing resources.
- 3. Doing** is implementing the work to be done.

To grow effectively, begin replacing yourself in the "doing" area on the bottom row first. As a business owner, your time is worth more than \$15.00 per hour. When you begin to grow, replace yourself in those areas first. Start with the area you are not good at. Stay in your strength zone.

For example, if you're good at marketing, but hate bookkeeping, the Administration area is probably suffering. Get a clerk and/or a bookkeeper that can help in that area. Or, perhaps you don't like doing the technical work of the business (or that is the most overwhelming, time consuming area for you). Put someone in place to do the basic parts of Operations so you can focus on Marketing, Sales and Administration.

When I started my first company out of the trunk of my car, my name was in every box just like this chart. Of course, at that time I didn't even know there *were* boxes! Eventually I hired an Operations Assistant. Then I hired a couple of Operations Technicians. Then I hired people to answer the phone (Inside Sales), to send out Newsletters and marketing materials, and to do data entry (Administration). I hired a bookkeeper. I did the marketing and outside sales.

Later on, I merged with a couple of other small business owners and put one in charge of Operations and the other in charge of Administration. We then hired

more people to do inside sales and on-location sales. Eventually, I got someone doing marketing with me and then *for* me.

Finally, I was only in two boxes -- “Marketing Director” and “Sales Director.” Today my business is turnkey. Although I meet with my staff once a week and we work on projects, I don’t really have a “job” in that business other than the responsibility of owning the business.

Once you fill the bottom boxes, you can move to the middle boxes. In fact, it doesn't even have to be that clean. You may still be "doing" some of the work while having a managers in other areas. For example, as I write this manual, I am "doing" work "in" the business. At the time of this writing, I present workshops, seminars, and do some coaching and consulting in addition to writing, but I have an Operations Manager, a Marketing Manager, Sales Manager, and an Administration Manager.

Although I'm doing some work "in" the business, it is strategic work that I enjoy doing - and that reaps big rewards. However, at any point that I want to stop doing any part of what I do, I can. When you build it with systems in mind, you create something that can survive and thrive beyond you.

### ***The Four Roles of the Business Owner***

On the Wheel of Life, there’s a spoke called “Career.” You want to think about what *role* you want to fulfill in your small business. Don’t worry about *how* right now. Just think about your life goals and what kind of work lifestyle you are after. Remember that you want to design your business around your life goals. There are four roles you can choose to fulfill in your small business

1. **The Technician.** What I mean by “technician” is the one doing the “technical” work of the business. In a service business, the technician role is obvious, but even if you run a retail store, or you are an independent professional, the doing of the work is what I am talking about – making the sales call, processing paperwork or serving a customer. It is the *doing* of the work. Is there anything wrong with being the technician in your business?

Absolutely NOT! If that’s what you truly love to do – if that’s what you are called to do - and you can balance your life, it may be a wonderful thing for you. You may want to do what doctors do – get an administrative staff and a

number of assistants around you so that you can grow your “practice.” All of the concepts in this chapter will assist you, even if you want to continue doing the technical work. But you must organize the other aspects of the business so you are not so overwhelmed. I want you to be the "technician" because you *want* to, not because you feel you *have* to!

2. **The Customer Service Manager.** This level is when you have others doing the majority of the technical work, but you are still managing the service experience. A good example of this is an in-home service company. Say you are a plumber and you are normally the one that does the work. Once you develop a system, even an ordinary plumber can get extraordinary results by simply using the system that you have developed. You are still “controlling” the client experience by directing the action. You talk to the client over the phone and sometimes stop in on jobs.
3. **The General Manager.** At this level, you have a team that does most of the day-to-day duties – marketing, sales, service, and accounting. But you are there to direct the operation. Sure, you can take a vacation and leave someone in charge, but you call the day-to-day shots.
4. **The Turnkey Business Owner.** This is a level that I think all business owners dream of, but, sadly, few ever reach. You have management in place that call the day-to-day shots. You can do what you want to do, when you want to do it. If you want to go away for the summer, you can. Some people believe this is a fantasy. Of course, I’m living proof that this can be done and I’ve helped others do it, too.

But let’s look at some examples that maybe you can relate to...Walmart and Sam’s. Could Sam Walton be in every store? No. He loved to be involved where he could, but it was impossible for him to be involved in everything that happened at Sam’s and Walmart. “But Howard, that’s a HUGE company. What does that have to do with me?” you might ask.

***At one time, Sam Walton had ONE store!***

What about Warren Buffet? Does he answer the phone at Geico and write insurance? No. Does he work the floor at the Omaha-based furniture store that he owns? Of course not. So, the point here is that you have to start somewhere. And the place you want to start is getting your business systematized and organized so

it is more predictable. You want to begin the process of replacing yourself in the areas that you are not good at and that you are not supposed to do.

### ***Systems Component #3: Policies***

These are the guidelines - the rules and regulations for example. Policies are to clarify expectations on conduct issues, dress code, etc. A good example of a set of policies is what would be in your Employee Handbook.

Be sure that your policies compliment your mission rather than compete with it. For example if your mission is to provide the most outstanding service experience ever, don't make policies that are going to frustrate the client.

You can get an Employee Handbook template for your state. Make any needed changes to it and have a labor attorney review it. The technical policies for your industry may be found through industry associations, etc. Otherwise, you'll have to write them line by line. Even if you get something already done, chances are that you'll have to invest time tweaking it.

### ***Systems Component #4: Procedures***

A Procedure is the "how to". Make your procedures step-by-step. If it is a computer program, include each keystroke (within reason - you can't always cover every possibility). If your industry has technical training and/or manuals to use, you can cut the development time down. We have one department in one of my companies where a technical manual developed by a training company in our industry is used as our technical manual. Whatever the book says, that's how we do it.

The idea is that you can hand someone that has never done the work the procedure and they could do it without any further instructions. This reminds me of when I first started traveling to do workshops. My brother was traveling with me because he has an accounting business that only requires a few months of his time and he's basically "off" the rest of the year. We were on an airplane and he was sitting behind me.

I simply handed the timeline and procedure for the one day workshop over the back of the seat and he read it on the plane. The next morning when we went on break I couldn't find my brother! The rental car was gone and so was he!

"Where could he have possibly gone?" I thought to myself. A few minutes later, he pulls up and walks in with a Starbucks in his hand.

"You're kidding!" I'm thinking to myself. Here we are on break and I need help with orders and he's at *Starbucks*! "Why did you go to Starbucks?" I asked him. "Because the procedure said to go get you a coffee from Starbucks during the break and to be back by 10:30. Two sugars right?" he said. I had taken the break a few minutes early. He followed the procedure. I didn't!

Although that's kind of a funny story, it proves how you can write a procedure, hand it off and not worry about it.

### ***Component #5: Position Results Descriptions***

Once you've determined what positions you are going to fulfill in the business, you need to fill in the other boxes.

Position Results Descriptions (or Job Descriptions) is the next component. Position descriptions outline each of the roles and the duties required to fulfill that role.

Many job description examples are long and cumbersome. A simple way to do it is to create a line item for each position. Each of the items will be connected to a policy or procedure.

Each of these line items can also be called a "Key Result Area" (KRA). A KRA spells out the results that are expected for each key area.

For example, a Bookkeeper Position Description would have a KRA called "Accounts Payable". It would read as follows:

Key Result Area: Accounts Payable

My job in this area will have been completed when I have entered all payables according to Our Company Accounts Payable Policies and Procedures.

You see the task is connected to a policy or procedure. It may have been done, but done wrong. Attaching the KRA to a policy or procedure insures it

was done right, but does not require you to write every policy or procedure before you can have position descriptions.

**Here's an example of a PRD and a checklist:**

Bookkeeper

My job in the following areas will be completed when I have:

1. Entered all job tickets according to Job Ticket Entering Procedure
2. Entered all incoming bills according to Accounts Payable Procedures
3. Invoiced all unpaid accounts according to Accounts Receivable Procedures
4. Make Bank Deposit according to Bank Deposit Procedure
5. Sent out all Referral Certificates according to Referral Certificate Procedures

**Job Description Checklist**

**Daily**

- Process Incoming E-Mail
- Check Voice
- Post on Social Media
- Make 20 Referral Calls

**Weekly**

- Send Weekly E-Mail Newsletter
- Attend Weekly Staff Meeting
- Submit Weekly Marketing Report
- Change All Banner Ads
- Update Websites

**Monthly**

- Send Monthly Newsletter
- Update Print Ads
- Update Marketing Plan
- Submit Magazine Article

### ***3 Simple Brain-Dead Steps to Get Started Building Systems Now***

**Step 1:** Make a long list of “tasks” or procedures. Think of everything that happens in your company. Keep adding to the list until you have the major Key Result Areas identified.

**Step 2:** Assign them to a specific person in a Position Results Description. Go over the Position Results Description with the team member.

**Step 3:** Begin developing your most important Policies and Procedures. Communicate them in writing and in training to your team.

## **A Bird's Eye View of The 5 Systems of a Phenomenal Business**

In 2011, I got the pleasure of helping Tom Ziglar create a powerful business assessment for Zig Ziglar's last book *Born To Win*, that Tom co-authored. He and I had our own "list" of the core systems a business should have, and they were a little different. As we began to flesh out the "parts" that every phenomenally successful business needs to have, we finally settled on 5 specific areas of the business.

### **System #1: A Phenomenal Marketing System**

Marketing is everything you do to attract *prospects* to your business. Notice that I said a *phenomenal* marketing system. The marketing of most small business owners is poor.

Marketing is the key to business growth. Without customers you have nothing. You can do a wonderful job, but if you don't have enough customers, nothing else matters. So, you want to have not just good marketing, but phenomenal marketing. What is phenomenal marketing? Marketing that is remarkable.

Extraordinary. Outstanding. Phenomenal Marketing creates experiences that engage, educates and builds a sense of belonging.

And you want to have a marketing *system*. Once you determine what phenomenal marketing looks like in your business, you want to figure out how to duplicate it without you having to do be involved in every detail.

Here's an example: Let's say that you determine that mailing a newsletter to your database helps you bring in more business. You write a procedure on how to do the newsletter and get someone else to do the mechanics of it. You might still write it, but let someone else lay it out, print it, mail it, get the database together, etc. Then put it on a calendar so it happens without your direct supervision.

This manual reveals the proven secrets of a phenomenal marketing system that has revolutionized small businesses worldwide.

## **System #2: A Phenomenal Sales System**

“Sales” is everything you do to turn a prospect into a paying *customer*. Once you generate a prospect through marketing, the sales system is what turns them from prospect to customer. Remember, you want a *phenomenal sales system*.

This includes answering the phone, your phone scripts, responding to an e-mail opt-in, presentations and so on. Once they have actually purchased something from you, they are now a customer.

Many times you may not need more prospects, but you need to take better care of the leads you get. Is your phone answered live? Is your phone answered in the most professional way possible? Do prospects and clients have a great experience when they call your company? Are your closing ratios what they need to be? Do you consistently make the add-on sale?

Do you have proven scripts for your people to follow so that you aren't the only one that can close the “big deals”? Do you have phenomenal on-site sales materials? How effective is your response to internet leads? Increasing your closing ratios and your job averages can have a big impact on your business.

This manual shows you my proven sales system for building a phenomenal business.

### **System #3: A Phenomenal Operations System**

Operations is everything you do to service your customer, patient or member. The level of service you provide, will determine whether they will ascend the "loyalty ladder" and go from customer to *client*. What's the difference between a customer and a client? A customer buys something solely on the price, value or special, but doesn't have any loyalty to you. A client wants a consultant, an advisor, or a partner so to speak to "take care of that area of their life" so to speak.

You wouldn't choose a doctor based on price. Would you? Or how about finding the cheapest accountant or attorney? If you do, you'll get what you pay for. Clients are loyal, they want a relationship, they want information and they refer others like them.

Do you have service systems in place so that your clients get *the* most phenomenal service experience *ever*, consistently every time? Without you having to be personally involved?

In this manual, you'll learn how to take this area to the next level.

### **System # 4: A Phenomenal Administration System**

Administration is tracking results. It is also internal office systems that include financial, accounting, legal, insurance and those types of things.

Do you know what your cost of doing business is? Do you know what your marketing efforts are producing? Do you know what your sales closing rates are? Do you know what your production rates are? Do you have a budget for the next 12 months? Do you have the right insurance and legal protection?

I think I just felt you become overwhelmed with all the "work" you have to do. Let me pause at this moment to take you back to Chapter One: "The ONE and ONLY Reason Your Business Exists is To Be a Vehicle to Help You Achieve Your L.I.F.E. Goals".

If you want to build a predictable, profitable, turnkey vehicle that will take you where you want to go in life, it will be a lot of work to build it. But it will be worth it.

Can you imagine a 747 flying across the ocean without knowing stats? Without knowing what the fuel level is? Yet, this is what small businesses do every day. They guess. They don't track. This is one of the most important parts of your business.

If you don't make money, your business isn't working! A business without a profit is just a HOBBY! And the only way you know whether you are making a profit is to track. ***Tracking will help you make more while working less.***

Read that again. Tracking will help you work less and make more. Why? Because when you get in touch with your *actual* numbers (prepare to be surprised), it will cause you to stop just running harder on the hamster wheel and take action on the things that actually matter.

You will not only get an education on this subject in this manual, but you'll also learn a *phenomenal* administration *system*.

### **System # 5: A Phenomenal Leadership System**

In 2011, I had the opportunity to meet John Maxwell, the world's #1 leadership expert. As the first person to become a founding member of John's very first coaching program *The John Maxwell Team*, I also got to spend time with John. The highlight was watching the Super Bowl at his home in Florida.

John says "everything rises and falls on leadership". *Everything*? Can that be true? He goes on to say that "leadership is influence". Nothing more, nothing less. And to gain influence, you must "add value to people". Is leadership required for marketing? Only if you want to influence people to do business with your company. And remember that all of business is about *relationships*. Marketing, sales and service is about relationships. Tracking your numbers reflects your relationship with yourself! Are you serious about your life goals? Or, are you using your business, just to get by in life. To have something to do.

Speaking of this, John Maxwell also says the toughest person to lead is yourself. When you begin to understand your strengths and weaknesses, and you begin to understand how to add value to other people -to influence them and to "enlist their willing cooperation to reach a goal" (Dale Carnegie), you can begin to build a phenomenal team.

This means that you don't have to do everything yourself. It means you can now find those people that can do the things you don't like to do (and probably aren't very good at). My strengths are marketing, sales, service and leadership. Did you notice that Administration wasn't listed? I hated the numbers! Until I got in trouble. Then I began to LOVE the fact that I could predict a loss in the future and do something about it before it happened!

I have a staff of 40 people that run my companies for me. I can tell you without hesitation, that one of my greatest joys in life is watching my team grow. To watch my managers grow as leaders (there is a difference you know), is thrilling.

The reason it is thrilling is because we now have a *phenomenal* leadership system.

This manual reveals a *phenomenal* leadership system.

## Go Deeper with this Training with ONLINE Training

The screenshot displays the website for 'The 2013 Inner Circle Coaching Program'. The header features the program title and a navigation menu with options like 'Dashboard', 'Online Training', 'Most Recent Webcasts', 'Bonus Items!', 'Member Support', and 'Testimonials'. A user is logged in as 'howard44-profile'. The main content area is titled 'Section 2: How to Build SYSTEMS in Your Business' and includes a video player for 'How to Build Systems In Your Business (Video from Phenomenal Leadership Retreat)'. Below the video, there are links for 'Systems Overview' and 'Operations Plan and Downloadable Org Chart'. A sidebar on the left lists the seven sections of the program, and a search bar is visible at the bottom left.

**Full Inner Circle Members can access EXCLUSIVE Video and Training on building Systems**  
Simply log onto [www.HowardPartridgeInnerCircle.com](http://www.HowardPartridgeInnerCircle.com)