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WORKSHEET

The 6-Point Process Checklist

The 6-Point Process Checklist is your guide to creating the processes that improve accountability and give you the options to grow your business, let someone else run it, sell it, or simply take more time off.

If you're reading this then it's possible that your business has grown too fast or come too far relying on people "just knowing" how to do their jobs.

It's not working anymore.

But, if you had the right documentation and a way to share it, your company could…

- Ensure continuity of service for your customers.
- Complete projects faster and more effectively.
- Always know who is accountable.
- Quickly train and better retain new talent.

There are two parts to this workbook:

- An explanation of the components of the checklist
- The 6-Point Process Checklist

This exercise will help you avoid some of the pains of growing your business. Use the checklist when you're documenting a new process, making updates to an existing one, or deciding if you need to stop doing something, all together. Think of this as your personal guide when tuning different aspects of your business. As a result of your hard work, you'll create the processes that make growing your company sustainable.

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Glossary of Terms

Below you'll find descriptions and examples of elements covered in the 6-Point Process Checklist.

Steps or Tasks in Your Process: Every process is comprised of critical steps or tasks. It's important to identify the steps in your process to ensure you don't have a single point of failure. Here's an example. "Joan," your key employee, knows everything vital to running the company. What if she finally decides to retire to that ocean-view house in Costa Rica? If she leaves, no one will be ready to do what she does.

Stakeholders and the Responsibility Matrix: The stakeholders in your process are the parties that are responsible, accountable, consulted, and informed. It's important to first identify the various stakeholders. Next, you'll want to assign them a role for each task using the Responsibility Matrix (see below). Why is this important? As your team grows, job roles are becoming less clear. Everyone points at someone else when you ask who's handling a given process, and things are falling through the cracks.

RESPONSIBILITY MATRIX: Define who is...

Responsible: The individual doing the work (typically, a contractor, an associate, analyst, etc)

Accountable: The individual ensuring the work is done correctly and completely (i.e. manager, senior team leader, etc)

Consulted: The individual(s) helping with planning, brainstorming, or problem solving (i.e. manager, senior team leader, an expert in the process, etc)

Informed: The individual(s) receiving updates on a process or task status (i.e. staff, management, etc)

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Glossary of Terms continued...

Due Dates: Due dates help to set expectations for your stakeholders and it gives them something to work towards. Set a due date for each of your tasks. If this is a reoccurring process, consider defining a relative due date or one that's relative to a previous task. i.e., 1 day after the previous task is completed.

Make It Practical: Your process will be followed by a person. Have you written in plain language that makes it easy to follow and avoids unnecessary jargon? Are there steps that you can eliminate or consolidate to simplify the process? Write for your audience using the appropriate level of detail.

Frequent Updates: Update your process as things change in the company. This can include changes to stakeholders, tools, links, due dates, steps, and more. Things are always changing so make frequent updates to ensure your process is up to date.

Empower Your Team: As a business owner, manager, or executive you might have taken the first pass at writing the initial draft of the process. Once you have the initial draft, consider empowering your team to own the process, make updates as things change, and spot and improve on inefficiencies. Your team will most likely have an operator's perspective on the ins and outs of the process and will therefore be best suited to take the appropriate course of action.

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The 6-Point Process Checklist

Process Name: _____ **Date:** _____

Process Description:

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1 **Identify the steps or tasks** ☐

2 **Identify stakeholders and assign responsibility**

    a. Identify various stakeholders in the process

    b. Assign responsibility for each task using the Responsibility Matrix ☐

3 **Set due dates for each task** ☐

4 **Make your documentation practical**

    a. Written in plain language, free of jargon

    b. Consolidated or removed unnecessary steps (if necessary) ☐

5 **Make frequent updates as things change in the business** ☐

6 **Empower your team to:**

    a. Own the process

    b. Make or flag changes to the process

    c. Improve on inefficiencies ☐

Congratulations!

You've taken time out of your schedule to document your process. Whether if you're interested in improving accountability, increasing the value of your business, gaining more control, or giving yourself more options, you're on your way to bigger and better things. I want to encourage you to keep those processes up to date and empower your team to make updates when things change in the business.

If you would like help with refining or documenting your company's business processes, check out my business process consulting plans where you can hire me to build the processes to help train workers faster, keep employees accountable, and maintain continuity when key people leave.

To your success,

Xavier Chang
Principal and Founder
XC Consulting

In case we haven't met...

My name is Xavier Chang, and I'm a business process consultant. I work with Owners and CEOs to define and document their processes so they always know the jobs being done right. I believe in the positive impact that an effective process can have on everyone in an organization.

Years ago, I was an in-house business analyst for a big corporation. I went two weeks without a laptop, direction in my job responsibilities, or a colleague to show me the way things were supposed to be done. I stuck with it, but when I eventually became a team manager, I wanted other new hires to have the support I didn't receive. That meant establishing clear processes so everyone could be successful. I launched the company's first on-boarding program, complete with peer-led training sessions and operations site visits. Other marketing and sales departments within the business would go on to adopt the on-boarding program, improving the speed and quality of training for their new employees.

I founded XC Consulting to achieve this type of broad-scale improvement in other organizations. My goal is for business leaders to know that the job's being done right, offering resources that train workers faster, keep employees accountable, and maintain continuity.

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