

DOCUMENTING YOUR KEY PROCESSES

Create *useful* guides for getting the work done.

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INTRODUCTION

Can you think of anything more tedious than reading a Standard Operating Procedures manual?

How about writing one?

Stating, relating, and summarizing action ideas to tell people clearly how to do something is hard work. Because of this, most documents of this type are utterly unreadable. They are painful to write and even more painful to read. The author tends to get tangled up in causes and effects, hierarchies of work, semantics, and context. The level of detail never seems quite right; it is either too detailed or leaves out essential information.

Small businesses, in particular, struggle with the *important but not urgent* chore of documenting their processes.

QUESTION:

How can the leaders of family-owned (small) businesses charge their teams with this task without tying up too much time and energy?

Simplify it!

You can take huge chunks out of the effort by taking an 80/20 approach and encouraging your teams to visualize their processes.

80/20 Approach

Use the Pareto Principle to reduce the workload of documenting your key processes.

Visual Thinking

Reduce your team's reliance on words, which can be exhausting, and focus more on pictures, diagrams, and illustrations.

This e-book explains how to use 80/20 and visual thinking to reduce the time and effort required to create helpful process documents.

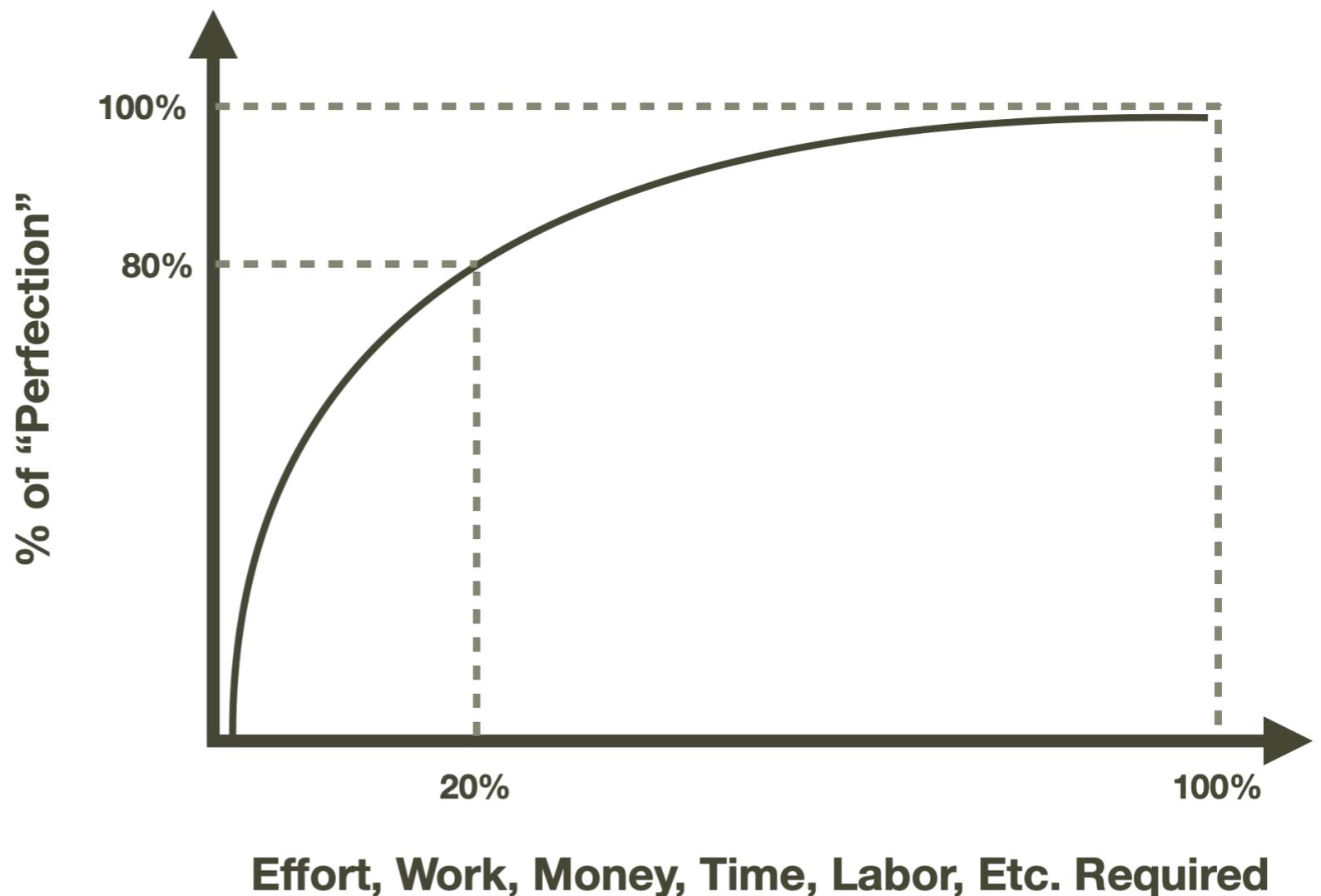
80/20 APPROACH - OVERVIEW

Use the Pareto Principle to reduce the workload of documenting your key processes.

I want to offer a slightly different take on The Pareto Principle and The Law Of Diminishing Marginal Utility. Ugh, I know, but I promise this is not your father's econ class. You've heard these terms, maybe even kind of applied them in your professional life, and you've probably seen the shape of this graph before. What's different is how I've labeled the graph.

This chart says that you can achieve 80% of "perfection" with 20% of the effort. However, if you insist on achieving 100% perfection, just know that it will cost you 100% of the effort.

You can apply 80/20 everywhere. I have even used this concept to justify to my wife that I don't need to edge and sweep the driveway and sidewalks every time I mow!



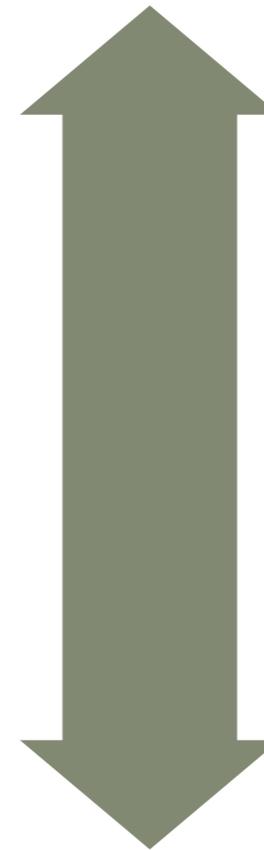
80/20 APPROACH - BREADTH AND DEPTH

Consider the implications of 80/20 for the coma-inducing subject of process documentation.



Breadth

Start with the few processes from the entire universe of your company's processes that account for the most activity in your company. It may seem unsettling, but you do not need to document all your processes, just the biggies. Ignore the rarely-used workstreams for now. Nobody will give you a gold star for completeness.



Depth

Keep the detail for each process at a high level. Your document should provide a high-level overview, the steps (hopefully 5-7 or so), and diagrams. Your intended audience is a new employee who has approachable teammates and supervisors available to help when he gets stuck. The audience is *not* an ISO9000 auditor.

VISUAL THINKING

Reduce your team's reliance on words, which can be exhausting, and focus more on pictures, diagrams, and illustrations.

“ *A diagram is a good way to explain how parts of a whole interact. It's nearly impossible to communicate today without using shapes to symbolize various types of relationships and their interactions.* ”

- Nancy Duarte

“See” the Process

To compose clear instructions, you must begin by “seeing” what you are saying. Once you have the image, simply copy it into words.

End Products

Write each action idea to reflect a tangible end-product that you can hold in your hand.

Context

Keep the context of the process at the forefront. Get clear on the “suppliers” and “customers” of the process. Maintain your understanding of how the process at hand fits into the larger hierarchy of activities.

“Loose” Templates

Provide “loose” guidance to your team that emphasizes the visual aspects. Don't overwhelm them by forcing them to laboriously fill out rigid or highly-detailed templates.

“SEE” THE PROCESS

You must help your audience "see" what you are saying. But first, you must begin by "seeing" it yourself.

Suppose your objective is to help co-workers and future teammates understand the process you've documented. In that case, you must first have an image in your head. Then, simply copy it into words. The reader will then recreate the image from your words. She will then better understand the topic and might even "be engaged" with it.

For example, consider some wildly popular songs over the last 30 or 40 years. As you read these lyrics and "hear" these familiar songs, notice how you build up a mental picture in your mind. Your brain can't help but produce its own "video" of the song. You build a "memory image," and it grows along with the song.

Jack and Diane, by John Mellencamp

*A little ditty 'bout Jack & Diane
Two American kids growing up in the
heart land
Jack, he's gonna be a football star
Diane's debutante, back seat of
Jacky's car*

*Suckin' on chilli dog outside the Tastee
Freez
Diane sitting on Jacky's lap
Got his hands between her knees
Jack he says
"Hey, Diane, let's run off behind a
shady tree
Dribble off those Bobby Brooks
Let me do what I please"*

Something Like That, by Tim McGraw

*It was Labor Day weekend, I was 17
I bought a Coke and some gasoline
And I drove out to the county fair
When I saw her for the first time
She was standing there in the ticket
line
And it all started right then and there
Oh, a sailor sky made a perfect sunset
And that's the day I'll never forget*

*I had a barbecue stain on my white t-
shirt
She was killing me in that miniskirt
Skippin' rocks on the river by the
railroad tracks
She had a suntan line and red lipstick
I worked so hard for that first kiss
And a heart don't forget something like
that*

Our Song, by Taylor Swift

*I was ridin' shotgun with my hair
undone
In the front seat of his car
He's got a one-hand feel on the
steering wheel
The other on my heart
I look around, turn the radio down
He says, "Baby, is something wrong?"
I say, "Nothing, I was just thinkin' how
we don't have a song"
And he says*

*Our song is the slamming screen door
Sneakin' out late, tapping on your
window
When we're on the phone, and you
talk real slow
'Cause it's late, and your mama don't
know
Our song is the way you laugh
The first date, "Man, I didn't kiss her,
and I should have"
And when I got home, 'fore I said,
"Amen"
Asking God if he could play it again*

END PRODUCTS

Write each action idea to reflect a tangible end-product that you can hold in your hand.

We can easily visualize chili dogs, barbecue stains, and slamming screen doors, but what about your processes? That might take a little more imagination. Fix in your mind a visible, tangible thing you can hold in your hand at the end of the task. It makes no difference whether you are writing about the overall value stream and the product for an end-user customer or the thing you get at the end of a step.

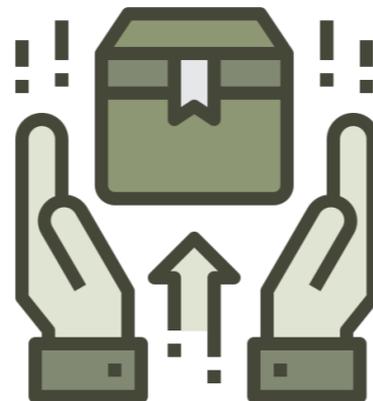
This idea works in the office, too. The tangible thing might be a document that needs to get approval.

"I'm just a bill, sittin' here on Capitol Hill."

So, you might imagine a rolled-up scroll with arms, legs, and a face, sitting atop the accounting department's "inbox."

Of course, by documenting processes, you are explaining how to DO something. Ready. Set. Action!

- Use action verbs
- Use subject and predicate sentence fragments, if not complete sentences
- Be specific
- Word the idea to reflect a tangible thing



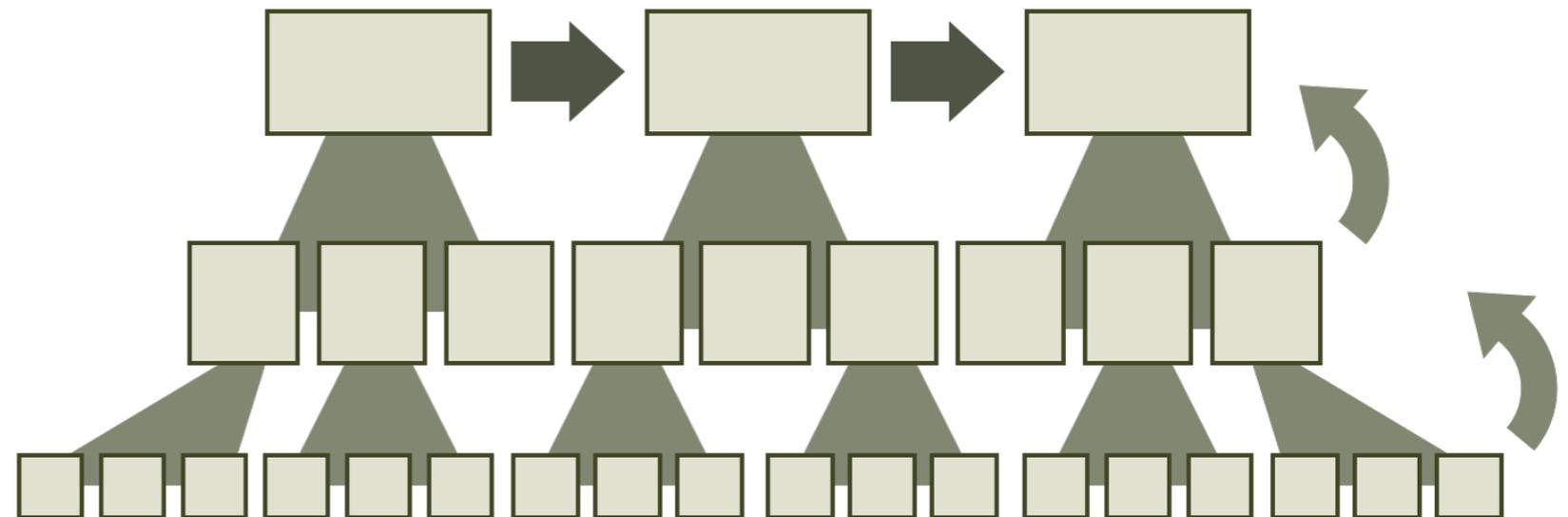
CONTEXT (1 OF 3)

Sketch a hierarchy of activities to avoid getting lost in semantics and cause-and-effect.

One endearing challenge of having co-workers is arguing over semantics. Specific to documenting processes, I frequently hear petty arguments over whether such-n-such activity is a process or a task. Imagine leading a meeting to brainstorm a list of ALL activities that need to be done to get a final product into the customer's hands.

You might give each member a pack of sticky notes and a Sharpie. You then instruct them to write a single task - subject and predicate - on a sticky note. Keep writing tasks until everyone is out of ideas. As the facilitator, you then put each sticky note on a big wall in roughly chronological sequence, left to right.

As you put sticky notes on the wall, you might notice that there are many duplicates - two or more people thought of essentially the same thing. That's fine. Just stack the notes on top of each other so they look like just one note.



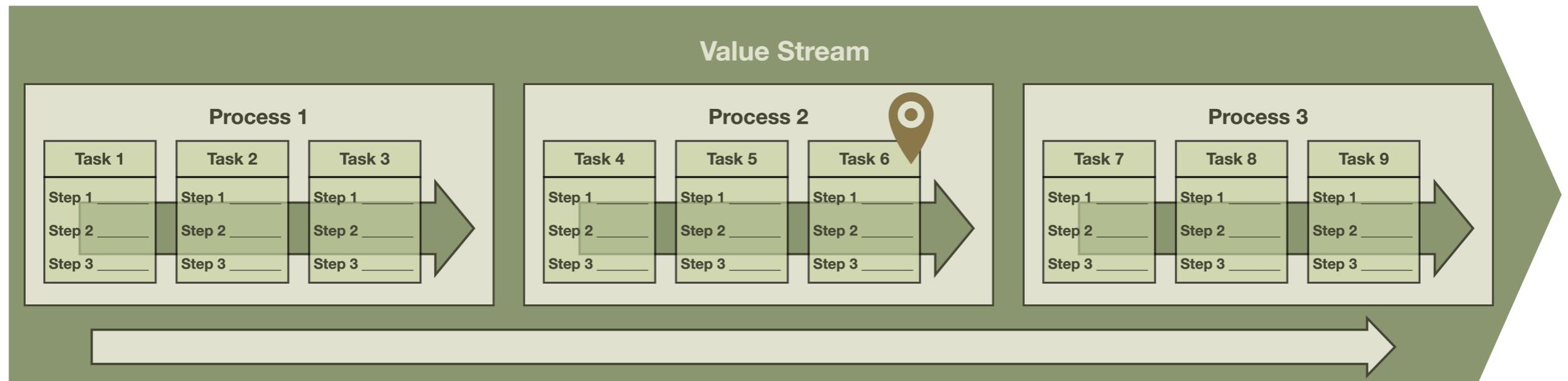
“We do these things below to achieve these things above”

You might also notice that not all activities "are at the same level." Some sub-activities can be grouped under higher-level activities. So, a "hierarchy" of work begins to emerge. For example, you might group three sticky notes under another one and say, *"we do these three things to achieve the thing above."*

Through this "thought experiment," I hope you can begin to "visualize" your own operations. If you really did the sticky note activity with your team, I believe you would all have a much better understanding of what work needs to be done.

CONTEXT (2 OF 3)

Visualize and illustrate how each activity fits into the big picture.



You are here!

You likely are accustomed to thinking about your operations like a flowchart rather than a pyramid. Here's a simple diagram to illustrate how I think about the language of "work." Without going too far down a rabbit trail, a value stream map depicts the physical flow of materials from outside suppliers, through your processes, and ultimately to the customer.

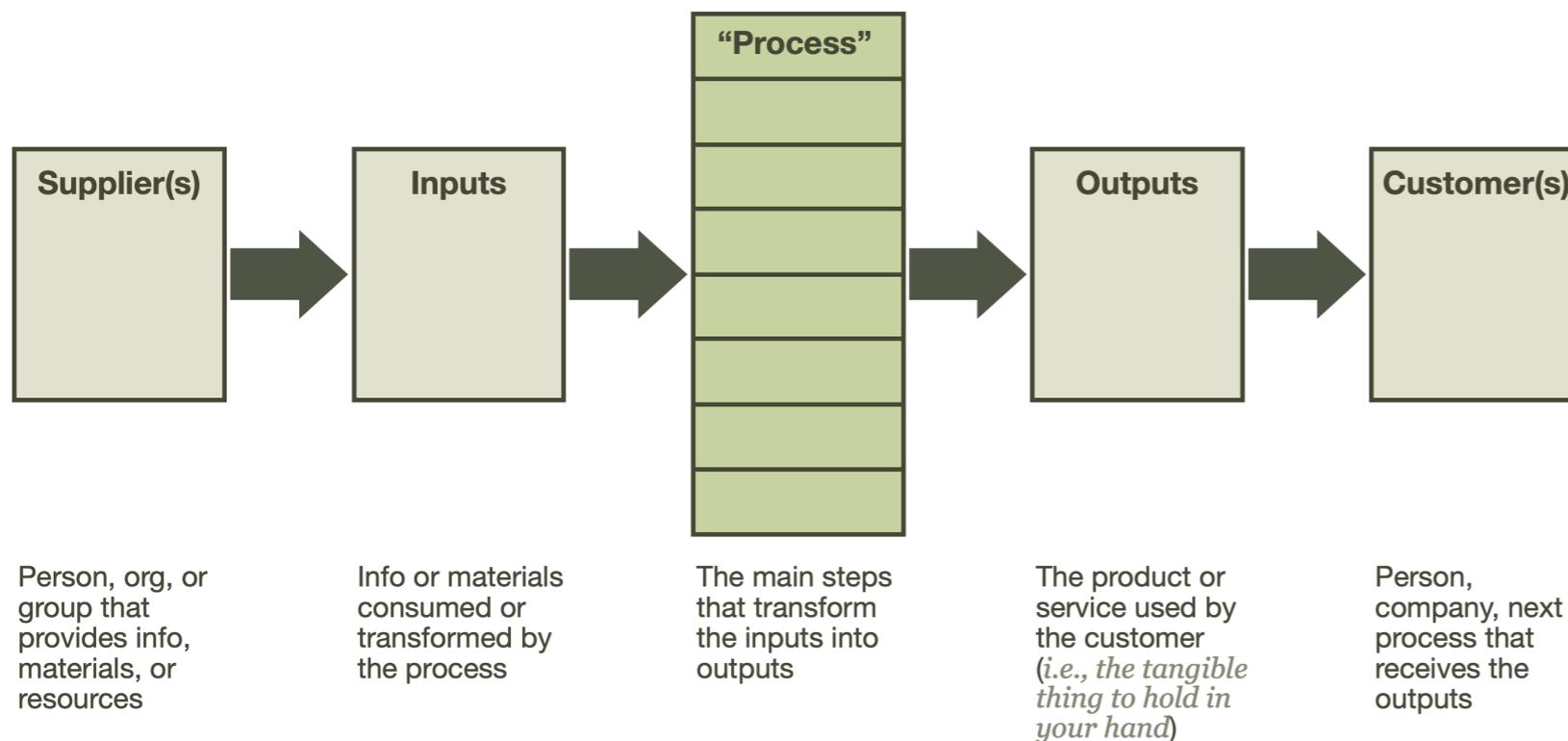
To straighten out the language of "work," this diagram shows that a value stream is an ordered collection of processes. Tasks, in turn, are activities to achieve the tangible end product of a process. Finally, steps are lower-level activities to achieve the tangible end product of a task.

You must visualize the tangible thing you can hold in your hand after completing each task. Similarly, you must visualize the tangible thing after completing each process. Ultimately, the tangible thing at the completion of the value stream is literally THE thing you hand your end customer.

Can you imagine a new employee's level of understanding if you first present her with this type of contextual information?

CONTEXT (3 OF 3)

Everybody has customers!



Thinking of downstream entities as customers can have subtle but powerful effects on your team atmosphere.

Training a new employee to "send it down the line" is wildly different from training him that the next step is to *"hand it Steve down there. Steve is responsible for _____. So, hand it to him like this. That way, he doesn't have to turn it upside down and undo this thing."* At a minimum, you are now thinking of wasted energy, not wanting to do something that Steve "undoes" every time. Better still, the new employee regards Steve as a human and a teammate.

Lastly, identifying your suppliers and customers can help you clearly define the process's start and end point.

“LOOSE” TEMPLATES

Provide "loose" guidance, emphasizing the visual aspects to your team.

Templates can be helpful in documenting processes to a point. They can force the writer to think of everything so important aspects don't get overlooked. Templates can also provide continuity for a reader hopping from one process document to the next. But templates can also be overwhelming.

Apply a thoughtful 80-20 approach to designing a template. Leave plenty of white space to encourage creativity and visuals. A simple template is sufficient for most business settings (all but the largest, highest volume companies).

Constrain your documented process to one page, two if you must. Avoid creating "books" of procedures that look daunting.

Items to Consider Including

List of sequential steps - No more than five to seven. If you have more than seven steps, you may either need to split your process into two or double-check the logic and groupings in your steps.

Visuals - Include pictures, diagrams, and screen-shots. Get creative and keep them simple. Apple and IKEA have perhaps gone too far in making their instruction pictures too simple. Elegance and simplicity taken to the extreme are just needlessly abstract.

No-no's - Common mistakes and shortcuts people have made, along with the unfortunate downstream consequences. *"Don't be like poor Steve..."*

Task [REDACTED]		
Work Instructions		
Step	Key Points	Diagram (Visual)

IMPLICATIONS FOR THE WORK ENVIRONMENT

Consider ways the work environment can reinforce and enhance your documented process.

Signage

Ensure that signage near the work area reinforces the process you described. This includes labels and markings to designate work-in-process inventory before and after the process. Similarly, ensure that signage and floor markings don't contradict the document. Post larger pictures and illustrations from your documentation for critical steps.

Workstation Layout

The layout of the employee's workstation should reflect the order of steps in the process. Include helpful quick-reference visuals at the exact spot where a step should be performed.

Tools

Locate all the tools required for the process within easy reach. Remove tools not needed from the work area. Provide clearly labeled places for each tool. *Alcatraz used a **shadow board** in the kitchen for all the knives and utensils. Prison guards could tell immediately if a knife was missing!*

Training Materials

If your documented process is not *THE* training document, ensure training materials reinforce the process document. Resolve any contradictions.

Materials

Work-in-process inventory should be within easy reach of the workplace. Similarly, ensure that any required consumables (screws, tape, office supplies, etc.) are also within reach.

A WORD ON ACCOUNTABILITY

Your collection of documented processes becomes the backbone of your "business hypothesis."

Thank you for reading this far in my e-book! I hope you find it to be just the right level of detail to be genuinely helpful. I want to leave you with a few closing thoughts about accountability.

The process documents your team develops should help instill a culture of accountability. Clearly, there are Human Resources and "performance management" implications. More importantly, this effort will help you be accountable to your *"business hypothesis."*



When you launched or purchased your company, you essentially told your friends, family, and financiers

"If we do all of these things (make these products, serve these markets, etc.), we will be profitable, and customers will love us."

A collection of documented processes spells out how your company will do many of those things. Said another way, you are designing the experiment to prove your business hypothesis. Granted, many of those things will be pretty mundane. But, the fascinating stuff will be the proprietary systems that make your competitors envious.

If you never bothered to spell this stuff out, you would never know if *it* is working. You'd never know if you are doing *it* the way you said you would. If *it* isn't working, you will not know where to start tinkering. If *it* IS working, you'd never know if it was because your team is doing all the right things the right way or if luck might be a factor.

So, your operations manual (collection of documented processes) helps your company be accountable to its purpose and the overarching business hypothesis. It provides the baseline so that you can answer the question, "are we doing things the way we are supposed to?"

CLOSING COMMENTS

Most business owners agree in principle that writing down their processes is a worthwhile activity. Stephen Covey would call this activity Quadrant II - important but not urgent. Finding the time is just one problem, however. Writing processes is boring. Writing processes, knowing that nobody will ever read them or follow them, is degrading.

I hope that, by showing you how to adopt an 80/20 approach and use visual thinking, I have made documenting processes less of a chore. More importantly, I hope your documents will come to life for the people referring to them.

Your team can use an 80/20 approach to focus on the most critical processes and thereby avoid mental burnout at the idea of having to document every process. Your team can also use 80/20 to help keep each document "high-level." This does imply, however, that your employees are approachable; that is, they are willing and cheerily available to help newer employees with questions and finer details.

The people you entrust to documenting your key processes can use visual thinking to improve the language they use to convey ideas. They must first get a clear picture in their head. This requires great imagination. Encourage that! See the process. Imagine the tangible end product at the end of a task. Never lose sight of the context (how this low-level step fits into the big picture). Simplify your templates and encourage your team to create illustrations and diagrams.

In time, you will have an entire Operations Manual full of documented procedures that describe how your company operates.

Imagine allowing a prospective buyer to thumb through the pages. That buyer will know that your company means business!

ABOUT BOB

Bob Ross of Highland Ross serves as an executive and business coach, working with business owners and leaders who are stuck in some aspect of their businesses.

Through his professional career in corporate America, small business America, and in the community, Bob has come to believe that our community is stronger when its local businesses are anchored with good leaders. The businesses themselves are stronger. Their employees feel safe and secure in their roles in their companies. Business owners' relationships with their spouses and significant others are stronger when they are good leaders. Their children are stronger and more resilient. All of this positivity sends positive ripples throughout the community in many ways, shapes, and forms.

Highland Ross exists to help, to coach, to enable, to challenge our local business owners to be everything their significant others, their children, their employees, and their community need them to be.

Bob is married to Dixie, Assistant Dean of Finance and Administration at Wake Forest University. Together, they have three spirited, active adult kids. All have been active in the community, the church, and in sports.



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