HOW TO DOCUMENT YOUR BUSINESS *THE RIGHT WAY*

the process MENTORS

A Guide

By Tamara Kemper of The Process Mentors

Introduction for Business Owners

Hello!

I created this guide for small business owners who know they need their team to document their processes so they can grow, but want to be as kind and organized about the process as possible.

I help small businesses document what they do every day and I've seen the look of terror in the employees' eyes when they first hear about what we're about to do together. Because the truth is, the very idea of writing down everything they do in their job triggers all kinds of fears in even the best team members. Fears like:

> *"If I write down everything I do, can they just replace me?"*
>
> *"What if they think I don't do enough, once they see it all written down?"*
>
> *"Will I be able to do this 'side project' and still get my work done?"*
>
> *"How would I even start to describe everything I do?"*

So it matters how you approach this project. Do it the right way and you'll be on your way to having a fully-documented business that will allow you to better weather the storms of sudden employee turnover, market downturns, or even someday selling your business. Do it the wrong way and you could have a mutiny on your hands.

So let's do it the *right* way, shall we?

Doing it the right way means that you are considering the humans who will complete this project and what they need, including:

1. *Having a plan for how to get the project done and communicating it clearly and frequently*
2. *Starting by sharing why the project matters - both for your business and for them, personally*
3. *Involving team members in deciding how they'll complete the project, including allowing them to set their own deadlines, if possible*
4. *Injecting a little fun into the process*

The subsequent pages of this guide are meant to be handed off directly to your team members so they have a simple, step-by-step process to document their role (with little intervention from you). It is also meant to give you clarity on your team's progress towards completion, so this doesn't become a never-ending task.

Here's an overview of the process they'll go through as they follow the guide:

Step 1 They'll spend a full week tracking all of their weekly tasks to get a comprehensive view of all of their key responsibilities.

Step 2 They'll turn the results of that tracking into a "Process Inventory" which will be used to log their progress towards documenting their role. (In other words, you'll both know what "done" looks like!)

Step 3 They'll meet with you to review their completed Process Inventory, make edits, estimate the time needed to write down each process, and set due dates.

Step 4 They'll schedule meetings on their calendar to work on process-documentation so it gets done, based on the time estimates and due dates that were set with you.

Step 5 This is the big one - Either individually, or as a team, they'll start writing step-by-step descriptions of each of the processes listed on their process inventory.

Step 6 They'll submit their processes for review.

Step 7 They'll make any necessary edits and mark the project as "COMPLETE." Hooray!

But before you hand this guide over to your team, there are three essential things you need to do:

1. Add the following pieces of information to the "Introduction for Employees" page before handing it off to your team members:

    a) **WHERE** the process documents should be housed. (Example: A specific Google Drive folder, a company shared drive, or a process documentation tool like Trainual.)

    b) **WHEN** steps 1-3 need to be completed.

    c) **HOW OFTEN** you'd like updates on the status of the documentation project.

    d) **WHO** is designated as the final approver of each of the documents

2. Devise some ways to make this project FUN and DO-ABLE. (Because it will seem legitimately scary for some of your team members and there are ways to make it more palatable.) Here are just a few suggestions, but have fun with it!:

    a) Schedule monthly "Process Days" where you cater lunch, fill the conference room with snacks and caffeine, and document together.

    b) Provide awesome prizes for hitting certain milestones in the project, such as "5 Processes Documented."

    c) If your team is motivated by it, set up competitions amongst the team.

    d) Or if they're motivated more by having a team goal, set up a big reward for when EVERYONE gets to certain milestones in the project.

    e) Schedule role-swaps where they have to trade roles with another team member for a day and use the process documentation that's been completed to complete their work.

3. Hold a kickoff meeting to **inform** your team about the project (Including all the fun stuff you came up with) and **get their buy-in.** (Remember to highlight why documenting their role is good for *them personally*, not just for the company!)

That's it! You'll have a fully-documented business in no time.
Happy Documenting!

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Fixer of Chaos
The Process Mentors

What Would We Do Without You?

A Guide to Writing Down What You Do

By Tamara Kemper of The Process Mentors

Introduction for Employees

Hi!

By now, you know that your fearless leaders have decided to make an investment in clarifying the roles and responsibilities in your business. This will truly be a group effort with every team member contributing to the project. This guide will walk you through every single step for how to get your part of the project done.

It's a big project, for sure, but one that is completely do-able and will reward you with clarity in how you do things and flexibility to be able to easily get help from others when you need it. Vacation-time, here you come!

You'll need to complete each step, in order, to get the best results. Your manager has provided the following guidelines for this project so you'll be super-clear about what they expect:

- This is **WHERE** all process documents should be housed: _________________________
- This is **WHEN** each of the Initial Steps needs to be completed
  - Step 1 – Task-Tracking *(Takes ~1 Week):* ____________________________
  - Step 2 – Process Inventory *(Takes ~1 Hour):* ________________________
  - Step 3 – Process Inventory Review *(Takes ~30 Mins):* ________________
- This is **HOW OFTEN** your manager would like updates on your progress: ______________
- This is **WHO** will provide the final sign-off on each process document: ________________

Ready…set…GO!

Step 01

Track Your Weekly Tasks

Have you ever thought about all of the things you're responsible for in a given week? Even if you sat down and tried to write them all down now, I bet you'd miss some. That's why we're going to do a bit of task tracking this week, so you can get a complete-as-possible list of all of your responsibilities. I promise it'll be painless.

Directions:

FIRST - Write down every task you do throughout each day for a full week. (Each task only needs to be listed once.) You don't need to write down *how* you did it. Just give the task a name and quickly jot it down as shown in the example below.

By the end of the week, you'll have a list of every task you completed that week. This can be done on a Google Doc, in Excel, or even on a yellow legal pad. Choose the location you'll be most likely to remember to use!

THEN – At the very end of the week, spend 10 minutes brainstorming additional tasks that you only do once every few weeks or even less frequently than that. It can sometimes be helpful to review your calendar to jog your memory. Add them to the list.

Name of Task/Process
Create new client
Send billing reminders
Complete weekly billing procedure

Step 02

Create a Process Inventory

Now that you have a list of every task you did this week, it will become the foundation of your Process Inventory. A Process Inventory is simply a list of every process that is done by your role. In this case, we'll also use it as a checklist to track your progress towards getting this project DONE!

Directions:

To create your process inventory, look at the list of tasks you created in Step 1 and give each of them an official process name. Then, see if you can group them by categories. List each unique process you do, its category, and a brief description of what the process is for, similar to the example below. *(I recommend completing this step in electronic form.)*

Category	Name of Process	Brief Description *(What is the purpose of the process?)*
Client Management	*Create new clients*	*Add new clients to the database so we can track and manage their account.*
Billing	*Send billing reminders*	*Send reminders to employees to submit their hours worked so we can do billing on time.*
Billing	*Complete weekly billing*	*Bill providers so we can get paid for services provided.*

Step 03

Review Your Process Inventory with Your Manager

Now that you have a lovely process inventory that lists out every single process you are responsible for, it's time to review that list with your manager to finalize it and add time estimates and due dates for each one. This approved list will become the clear roadmap for which processes need to get documented for your role.

Directions:

Schedule a 30-minute meeting with your manager to review your Process Inventory. During this meeting, you should also plan to agree upon due dates for each of the process documents. Plan to set aside 30-90 minutes to document each process, depending on its complexity. This estimate can help you plan reasonable due dates for completing this task. **Now is not the time to be overly optimistic on your time estimates.** If you're not sure, err on the side of giving yourself more time to complete a process document...especially when you're first getting started. Your updated Process Inventory should look like this:

Category	Name of Process	Brief Description (What is the purpose of the process?)	Estimated time to complete	Due Date	DONE
Client Management	*Create new clients*	*Add new client to the database so we can track and manage their account.*	*30 mins*	*5/30*	
Billing	*Send billing reminders*	*Send reminders to employees to submit their hours worked so we can do billing on time.*	*60 mins*	*5/30*	
Billing	*Complete weekly billing*	*Bill providers so we can get paid for services provided.*	*90 mins*	*6/3*	

(NOTE: The "DONE" column shown here will be used to mark when each of your processes has been completely documented, but will be blank to start.)

Step 04

Schedule Your Documentation Sessions

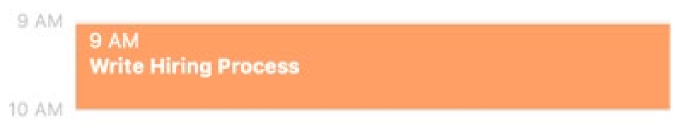
Now that you know when each of your process documents needs to be completed, it's time to give your future self a gift by pre-scheduling time to work on this project.

Directions:

Schedule them as appointments on your calendar with a specific process name associated, just as if you were going to have a meeting with someone. Remember, you'll need 30-90 minutes for each process, and you've already estimated the time it will take to do each one on your Process Inventory.

For some processes that involve multiple roles, it may be a good idea to document as a group, so be sure to consider who needs to be invited to each of these meetings. Some teams even find it fun and rewarding to schedule a "Process Day" where everyone gathers in a meeting room with lots of snacks and coffee and works all day to document as many processes as possible!

Be sure to choose days and times when you'll be least likely to be interrupted and have plenty of energy to focus. Many people find that mornings are the best time for process documentation.



Step 05

Document the Processes!

This is the big moment you've been waiting for. It's time to start writing those processes, either solo or with your team.

Directions:

Begin documenting your processes, according to the schedule you planned in Step 4. Try not to stress about getting it just perfect. Instead, I recommend starting out with grammatically-incorrect and poorly-worded bullet points to get all the steps out of your head as quickly as possible. You can make yourself sound sane later, but for now, you'll have a great messy first draft.

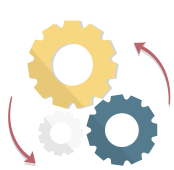
Then, once the steps are all out of your head, you can go back and add details, clean up grammar, and add screenshots, as needed.

Please don't worry about sounding fancy or businessey with your process documents. The most important thing is that other people could read your process and understand why they're doing this thing and the steps for how to do it. Dare I say, have fun with it!

Another option is to create step-by-step videos that walk people through how to do your task. Software like Loom can be great for this.

I recommend including the following pieces in every process document:

- **Title**
- **Date** last updated
- **Purpose** *(Why do you do this process?)*
- **Who** does each step
- The **Input** *(What kicks the process off?)*
- The **Steps**
- The **Output** *(What result or product is created at the end of the process?)*



Step 06

Submit Your Documents for Review

Remember allll the way back on the first page of this document where your manager wrote down who needed to be the final approver on all your finished documents? Well, it's time to start sending stuff their way!

Directions:

As you complete each document, share it with the person who needs to approve it. That way, they won't have a big ol' mess of them to review at the end of the process. It also ensures that you're on the right track before you get too far into the project and allows you to adjust time estimates and due dates as you become smarter about how to write down what you do!

Step 07
Make Final Edits

You're in the home-stretch now! Just a few more edits!

Directions:

Make any necessary edits you received from your designated approver and then mark that process document as "DONE" on your Process Inventory! Doesn't it feel good?

Keep on repeating this process until every document listed on your Process Inventory has been reviewed, edited, and marked as "DONE." Once you've made it through them all, the project is complete!

Sweet Success!

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