

Sink Handle Episode 23: transcript

Hello, everyone, and welcome to Episode 23. If this isn't your first episode of the Sink Handle podcast, you will surely know that I think systems are vital to a business. They are what keeps everything running, they are what takes an idea and puts it actually into the world. It is what changes all of those ideas we have in our head to an actual business that can keep going on and on. I think they are the most important thing in a business. Having that kind of background set-up will keep everything running. They are the one thing that can save time, money, and most importantly, sanity. The reason writing things down is really helpful is:

1. You want to build consistency in your work in your product. If everyone does it the same way, because there's a policy, there's a procedure, there's a whatever, there is a way to do something, and everyone knows it, and we all follow it, the consistency of the work will be there. If you put people in a room with a whole bunch of supplies, and they have to build a product, they will all do it differently. But if they have a procedure, and everyone follows it, you will have that consistency. And whatever it is, the product, the service, just getting invoices out every month to your clients on time, that kind of consistency, knowing what the procedure is and how to do it. That really reflects out onto the clients. Those are the ways that the client knows that you are consistently a good source for whatever you do.
2. You want to save money and time doing these things efficiently. Learning the same thing over and over again, because you didn't write it down is such a waste. Telling someone else to do something and having them have to figure it out over and over again, because no one wrote it down is a waste of money. No one wants to pay someone to do the same thing to learn how to do the same thing over and over again, right? If we save that time and that money, because we're doing the same thing consistently, it will become so much more efficient.
3. You want to hand off these tasks to someone else one day, and being able to get that stuff out of your head and out into the world so that someone else can learn it. Very important to write it down.
4. The whole "if you get hit by a bus" scenario, so morbid that I say that. But it's true. What happens if someone leaves? Even if it's not malicious, right? Like, what if someone just gets sick or gets hit by a bus? What happens then, is all that information that's in their head gone? What if they were the only person who knows how to do all the things, and there's nothing written down, and they leave?

I have seen businesses go under or almost go under or struggle or lose a ton of money, trying to quickly rebuild all of that knowledge. Over the years I've been brought in to clean up messes that others have left in businesses. So I come in and I'm trying to help someone with their operations. Right. That's my gig. And I get there. And I'm like, do you have any policies right now? And they're like, I don't know, maybe? Or Oh, yeah, it's all in there. And then you get there. And the instructions say "create forms" or "send paperwork". And you're like, "I've no idea what any of this means". It was written for people who knew what they were talking about, but it was not written for other people. Not very helpful. So there are

four big reasons for writing things down. Right. Okay. So if you have started with SOPs, and procedures and systems, "Yay! Good job!" Thank you for listening to me. But now, I want you to think about how people would access this information. If you started writing these things down, or making videos or whatever your business needs. How do the people that need this information Get it? Is this easily found, if there are just random things in folders, it will be very hard for someone to pick up like that. If you're going to try to train someone having SOPs in all these different folders will make it near impossible for them to find them. Especially if you don't have access to them. So many people put things in folders and drives and then they're like, "Oh, they're in their drive folders" and never give anyone access to them. And they're like I have no idea what's going on. And then they spend half a day trying to find a Drive folder with some kind of documents in it and then they get there and nothing's labeled. Such a waste of time. Are they laid out in a way that someone who's never handled this

could pick it up? Your person who does invoicing leaves, and you have someone else coming in who's going to do invoicing for you. There is very little documentation or it's in folders and you're not sure where it is, or there are different things all over the place. So if you knew to look for the document that says, "This is how we do something, this is how we create the invoice. This is how we look up a fee that we add to these invoices" then great. But if you don't know to look for the sheet that talks about the fees, you won't know to look for the sheet. Creating a place where you can lay all this out is very helpful. And then is this in a format that they can easily get? Can you hand it off? If you write all this stuff in a notebook and it's in your office at home, and they are in a different timezone, How are they going to get it? It's great that you've written it down. How will you get it to them? So if it's in a format, where you can't get it to them, that becomes a problem too, right? So I want to give you an idea of how to structure this a little bit so that everyone can find what they need and so you aren't the person having to give everybody everything all the time. My solution is an operations manual. And before you all roll your eyes at me, (I can't smack you from here) while you think of some huge-ass book that no one reads give me a little credit. Operations manuals can take many forms. And we aren't corporate here. I don't like that whole level of corporate bureaucracy where everything takes a long time. I hate that. What I'm saying is: have one place where everything goes so that you can give access to that. And then everyone can find what they need very easily. For some people this will look like a table of contents sheet on a doc like a Word doc that will list out all the folders. One of my clients, he hates spreadsheets. So I've put together like a one-sheeter and it has the links to all of the folders he would need. How does he find the HR stuff? How does he find SOPs? How does he find client documents, all of the folders are listed with links. So he can save that as a favorite on his computer. And then click on that and find everything easily. It's like home base, we start here. Now, for most people who don't have an aversion to spreadsheets, I use a spreadsheet. I use a Google Drive spreadsheet so that it is easily shareable and you can put links in. Mine has tabs for each function. You can do it by function. You could do it by person. Whatever. This person covers these jobs, however you think is the best way. For most of my clients, I think the easiest thing is to do some categories like: AR and payroll, contractors, marketing, all the different kind of topics. And then it's easiest to find if you're coming in from the outside. If it's a bigger company, and there's lots of people, then maybe you put it by role, like executive assistant marketing director, whatever. And then it's easily found if a new marketing director comes in all their stuffs right there. So I would do that by function here. Let's say we are talking about payroll, or accounts payable, something like that. On there are the links to everything you need. Policies. Templates. Etc. Its home base, for all things that are "payroll dependent" in how your

business is set up. But I'm just going to go with this. And I'll give you an example. So I would set it up with like accounts receivable, accounts payable, maybe payroll for a small company, if you have a tab, that's all the finance stuff. So maybe the first column is category. So one would be payroll one would be 401k. One would be accounts payable, invoicing... Then the name of the process, what are we calling this? The name of the SOP, the name of the template, and then what types it is, so you can easily see if I look at a section of this, let's say I'm looking at 401k. For someone, I know that one's a policy, one's an SOP, and how to submit it once a tracking sheet for different elections. One's a template for the submission to the whatever company that we need it to be. I can go to one place and have all the things together. So that way, you can see what's happening. You know, if there's an election cheat, there may be a reason why. Right? So many times like, we don't know the questions we don't know. We don't know, we don't know. So we don't know to ask those questions about the thing that we don't know about the fees or the whatever it is that we have to add to this invoice.

You don't know about that part and someone forgot to tell us and now we're gonna have to redo something because the invoices went wrong. If you have everything together, you can quickly look through the 10 things on this topic and see what's going on, you can just have that you can have just something simple like that. I also add in the following because I'm a nerd: "Who created the SOP". "When was it last updated", this becomes important because if something's last updated in 2015- things have changed. You're gonna want to be able to look down there and say, "Oh, God, those haven't been reviewed in a while". You can also have a "Status: this needs to be reviewed" or (I'm starting to do this in businesses) "need to create" status. So as I think of things that they don't have, I enter it on this sheet, and then I have a "need to create" there. Then (very important!) add the link to the document. So you start here, and you can click to wherever you need from there. You can also add links to videos. So if you have someone who is creating videos to track a process, you can put it here so that people can watch the video and then maybe someone else can write the SOP or something like that. And then I always have a "notes" column, because we always have things to say, right? "This is old", "This needs to be updated", "I don't even know if this is useful anymore", "we need to create this", or "this needs to be created, but not in a rush". So having this kind of tracking of all the things in a business, a place to look is so so important. And it's it makes it so easy for a person coming in to find things. When someone has left, and they've left a big mess, trying to put the pieces together takes a lot of time, a lot of knowing that there used to be a process for something, or maybe there's a process, and you go look for it, and you find the thing, great. But what if you don't know the law, so making this home base having somewhere to go, and then you can send people in, here is my thing. Everything is organized, it's like a table of contents, you want to learn about a 401k, you want to learn about marketing, or even how other people just did the thing. If you have to go fix something in a funnel, and someone just left and you are in crisis mode, and you've got to go figure out how this person built this thing. So that you can go update a thing be really helpful to know all the documentation is right there. You could also have different versions of this. So I have one usually as a master, for me and for any of the higher level people. But maybe there's some functions in there that you don't want everyone in your company to know, some of the managerial things or some of the finance things, you don't want to have them have access to that. Then you can lock different sheets, you can create separate copies of this. So maybe you have an independent contractor, operations manual that has everything that the independent contractors would need. But none of the company stuff that they're not a part of, or management stuff, they don't need to know. You can have different split versions of this for different kinds of things. But

having even like a training manual, right, like, new person comes in, you have a sheet that has all the things they need to know. How do you track time? How do you submit invoices? How do you get paid? or any of the things that you'd need to know for training. Where are all the links to things? Here's the template for this, put it in one place, and then you can easily hand it off. So it gets easily found. It's easy to find in there, you can have a "START HERE" in the title if you want, if that makes it easier for you. So it's easily found, people can get access to it. And then they can say "Oh, I need access to that file". But if they don't have access to anything, if they don't know to ask, then it'll be laid out so that someone who's never done this before can pick it up quickly. That is a huge, huge advantage. If someone leaves, someone gets sick... We're in the apocalypse, the whole world crazy down, people are getting sick, people are leaving... all this kind of stuff. You want to be able to be as nimble as possible. And then this is a really easy format to hand off to. It's one sheet, you can hand that sheet off their video links, the SLP links, the temple links, everything's in one place. And it will make it so much easier for you to get efficient. It will also make it much easier to manage people or just to manage like the day to day for yourself having one place to go and be able to click to find a file, way easier than scrolling through seven folders and your drive trying to figure out where the hell you put that thing.

All in one place. Easy to get to even if it's just you. I do this for myself. And for the most part, it's just for me because I need to find things. Finding where I put the outline for whatever So this can really, really help. It's not a crazy old dusty book that no one's going to read. It's a living document that can be updated constantly, if needed, can add more things in, you can easily find things you can get these things off your plate, because it's so much easier for everyone else to find the stuff that they need. I hope that you can start thinking about this not as a, something else you need to do today, instead, as a way to be more efficient, and have everything run a little easier. Because that's what we're all about at Reynolds OBM making things run a little bit better, or you know, a lot better. Get out there and make your life a little easier. Seriously. The world is hard enough right now. I'll see you guys next week.