How to Build Systems in Business for Any Workflow in 3 Steps

() Creating business systems, processes, standard operating procedures, aka SOPs, all of those things are not nearly as hard as they seem. The first step in this process is mapping out the steps in the process. () So rather than thinking about things in terms of isolated tasks, we use flowcharts or other visual diagrams to actually show how all of the steps involved in a process actually connect and make it a true process. In this way, we're taking a step out of the weeds and looking at the thing we need to do as one kind of looping system. () When we actually visualize a system in this way, by process mapping, we're able to take discrete tasks such as edit a video, promote a YouTube video, send an email newsletter and connect those processes in a flowchart so we can see how one task affects the other. What's the best order of operations? Where do things slow down? Who's in charge of what pieces? All of these kinds of things can be much more clearly articulated, understood and improved once we make a visual map. In fact, I just shared a video where I went through how I tracked YouTube video ideas, vet those ideas, produce those ideas into videos and promote those videos across multiple channels with my content repurposing process map. If you want to watch that video, you can actually watch it here. But it gives you an example of how easy it can be to just map the high level steps involved in any given process. Now, that's all contained. Step one is actually mapping out your process, and it can be a really fun way to analyze the situation with a different type of perspective. So how exactly would you do this step if you want to take action right now, as soon as you're done watching this video. To do the mapping, grab a piece of paper and a pencil and start creating a flowchart, you're going to need to erase things. Yeah, yeah. All that stuff. But just start mapping out the steps in the process as far as you can see them try not to get too detailed. You can always break it down more later and just map the big picture steps in about 20 minutes. Don't give yourself too much more time than that. If you find yourself erasing a whole lot and that bothers you, consider using sticky notes as each step in your process and just drawing your arrows on another sticky note to connect them all together. Alternatively, you can use whimsical, Mural, Google draw, lucid chart, whatever () you prefer to actually create your process map digitally. In the video that I shared before, I was using whimsical and I was using it on the free plan to create a flow chart. But once you feel like, yeah, this is pretty much how I want this to flow. The second step of building out processes is to actually create equipment to support () the process and break that down a little bit. The second step of equipment really comes in three subcategories. We're talking about templates, technology or team. How can either of these three elements () equip this process to flow a little bit better? So templates is always the first one I look at because it's the easiest it's usually free to create. But how could you template different steps in this process to make it flow a little bit better? For example, I just did a video where I was talking about how I map out my content, my repurposing and promotion for my YouTube videos. That was the video I talked about earlier and the link also being the description. The next step I need to do for the prep or equipment phase is look at that list and start identifying what are the things I need to create to bring that process to life. So, for example, I need to create a messaging template that gives me all of the different pieces that I need to decide when it comes to drafting my content. I mean, things like what is my keyword, what are my tags, what are my playlists? I need to have those prompts, which I could start off by just putting in a notepad or a word, doc. But eventually when I'm building out my technology later on in this process, I'm going to add it into my ClickUp task. Similarly, later on in the process, I'm creating blog posts and email newsletters from my YouTube content. So both of these require me to create templates. So as I'm going through this process map, I'm going to start identifying and kind of create a to do list off of it, maybe in ClickUp listing off all the different pieces of equipment I need to create. So this might be a blog template, an email () newsletter template, these kinds of things that I can then copy when I get to that stage so I don't need to create them from scratch. Once we've kind of done all we can on the template front, which probably will take you awhile. That is generally the biggest timesaver we can do in a process, is creating templates for every step of the journey. Once we have template set up, we can put them into a technology or tool to help us actually manage that work. We could have a tool like ClickUp, which gives us the instructions and provides those prompts that we've created. Those kind of scripts and all that stuff is in our ClickUp account. We could use more of a database to actually automate the execution of tasks. We could use a tool like Dubsada or Honeybook to automate a workflow. Once we have our templates, our ingredients, well, then it's just a matter of equipping the technology with that content that the technology needs to do its job and take care of things. If we have templates and we have technology and there are still things in that process that we think we could do better, it's time to pull in the team. () Team implies human beings who do something that can't be templated and can't be delegated to a technology that you instead delegate to a human being. Ideally, you're not giving them robot work. Right, because humans are awesome. Let's use them for what they're good at. And we are going to have these team members execute certain tasks in a process to make it flow a little bit better, to make things be off of your shoulders. Oftentimes, the goal of building out these processes is to kind of spread out the work. So one person isn't in charge of everything or one business owner isn't wearing all the hats. So this team step of the equipment phase is a great opportunity for you to delegate responsibility of certain processes entirely or certain steps in a process if you're still delegating to VAs or contractors so you can really remove yourself from those pieces of the process. So so far, we've talked about mapping your () process so you can finally see how all of the tasks are connected. Then we talked about equipping the overall process with tons of templates, technologies and team members to help that process run a little bit better. Now it's time to talk about the final step of building out processes, and that is trying to use that. I mean, take the map that you created to kind of guide your behavior, take the templates, the technology and the team that you've now gathered and start actually trying to use them to accomplish this process. If you have team involved in this step, this trying phase is where you're going to want to start documenting this process and documenting not to scare anybody, but it literally just means write it down so it makes sense. Oftentimes a flowchart is a good enough first pass at documenting, but after a certain point, you might want to add some additional words on there. You might want to explain what exactly does this box in the flowchart mean? What are the steps involved to actually complete that? We're basically adding instructions so you can try this process out. Once you try the process for while, you might realize, oh, actually, back at the map stage, we have two steps that we don't need both of those we can eliminate a step. There you go. We go back to the map stage, we delete an extra step, we go to the equipment stage again. We could delete a template that we no longer need. And then we go back to the try stage and we try it all over again. We complete this feedback loop again and again and again, and that is process improvement. You've done it. You're there. You have your process now built out. If you're still watching this video, you haven't liked, subscribed and left a comment, please do that. Cost you nothing. It helps this video reach more people. Thanks so much. Back to the video to bring it back to a real life example here in the try stage, when I was mapping, I mapped out my content repurposing. When I was in the prepping phase, I was creating a bunch of templates and resources that we could duplicate to go through this process faster. In the try phase, I'm going to make the actual checklist I use for editing so I don't miss a step in the process. I might want to explain how exactly to log into our social media scheduler in order to create the social media posts that I have happening in a later step. And to be clear, this doesn't all need to be done in one sitting preventively. I'm never going to be able to anticipate everything. However, if I'm involving team in that equipment phase, which many of you () probably will be, any question that that team asks me about how to do their step in the process should be responded to by saying, that's a great question. Here's the answer. Go add that to the S.O.P or go create the SOP if it doesn't exist yet. So I'm delegating responsibility to help create these instructions in the try phase by actually listening to what questions people are going to have while doing the actual process. So all of the stuff can happen organically and you can add it little by little. Your processes are never going to be done, but they should always be getting better than where they were the last time you did that process. I'll add that in the prep phase, while I'm building a lot of templates and equipment and I might start to create some SOPs and documentation in that phase. Mostly my processes, my actually written documentation is created in this try phase because I use ClickUp, I use a ClickUp doc based system where I create documents and attach them or link them into tasks. So that way I can actually have my processes in one central document and connect them back to the ClickUp task that tell someone, hey, it's time to do this thing. Here's the instructions for where to do it. You can learn more about that kind of document based structure for creating a SOPs and click up by going and watching this video, which I'll have above talking about these six different ways to create documentation in ClickUp. So there you go. In one video, you have the framework that you need to start creating your processes. () Map it out, prepare some equipment and then try it and then do it again and again and again. What's most important for any kind of loop like this is that you just start doing it. I know that you're more likely to do something if you actually declare that you are going to do it. So to that end, use the comments below this video and tell me what process you are going to start creating for your business. You're going to start capturing, not even creating, but capturing for your business in the comments below. That might be my content repurposing process. That might be my onboarding process. That might be how I answer the phone. I'm finally going to figure it out, write a comment below and share with all of us what process you are going to finally write down. So that way your business can be a little bit stronger than it was yesterday. And while I know this might be a scary topic for many of you, I want to end this video the same way I and every single one of these videos with a reminder to enjoy the process.