Why Every Small Business Should Use THIS in 2025

() If you want to build business systems, there is no skill more helpful than starting to process map. I'm going to explain how to do process mapping on this simple whiteboard here, and then I'm going to show you how this active process mapping that you can do with me together here in about 10 minutes. Can help you actually lead in to systemizing your entire business. What I'm about to share with you is an overview of the process I've been running for the last seven years with around 2,000 small business clients. So I know this stuff really works. I'm going to try to keep it very simple today. And as long you have a whiteboard and some kind of marker of choice, or I guess just a piece of paper, you'll be able to follow along. So let's get started. () To do this simple approach to process mapping, we want to get a few symbols down right off the bat. Action, our observable reality, something that happens is in a box. The next is a diamond. This is a decision point where you are deciding between multiple paths that you could go down. The path you might take are connected by arrows. Arrows are letting us know the direction of flow. A lot of people will choose to skip these, but when things get tricky, these arrows will become your best friend. The next icon is a rounded rectangle or an oval, which is our start and stop. It just lets us know when we're beginning and ending. This isn't so important when you're on a whiteboard because you are literally going to run out of space, and that's probably going to be your stopping point. The fourth symbol, which is quite important when you're doing things analog with a whiteboard, is this one here. It technically means a predefined process, but what I want you to think of it as is almost It's like a folder. All of this stuff, if we combine it, we have a whole series of things, we can put it inside this folder, which is a predefined process. The reason this is helpful is because when you're on a physical space or on a whiteboard, you may run out of space. And so having this container that you can reference back to can be helpful. As you're going through all the steps, you get to a point where it's like, We have a quality assurance step. Man, there are a ton of things involved in that. Well rather than having to break out all of the steps of QA in that whiteboard when you're really not focused on it, you could just say, hey, this is my predefined QA process. And then on another whiteboard, on another day or in another time, you can then go back and break down what does this mean. Okay? So this is kind of a shorthand, a saved block, a module, whatever you want to think about it. But for whiteboards or physical mapping, it's very helpful to have. All right, so we've got the shapes down. Now, what are we actually mapping on this whiteboard. () That is our next decision. There are two ways to get to this answer. If you're working with my team or you're working inside one of our programs, we will have you start with a Process Org Chart. This is kind of a holistic exercise where we start to figure out what are all the things your business does. What this allows us to do is start seeing everything we have in front of us and then just start systemizing one by one by one. It's very helpful. Now, if you're not yet working with us on your org chart, or if you want a more piece meal approach to to dip your toes into systemization, my suggestion for you would be to start in one place. A place in your business that has both value and pain. And for most small teams, and that's who we focus with here on the channel of teams of less than 30. You probably off the top of your head know which parts of your business are valuable, are producing value for your stakeholders, your investors, your clients. You probably also know which areas are being a pain in your ass because you're not able to delegate them. They're not getting done right, they're causing mistakes. You know both of these areas. So all I want you to do is ask yourself which areas in your business have both of these things being true. They're both valuable and a pain in your butt. Whatever those areas are, pick the most painful and the most valuable, and we're going to start with there for process mapping. Once you pick your area, the next question is, what is the scope we want to focus on? What is the start and what is the stop of what we're looking to map today? () So for me, I might know that, man, the area that's really valuable but really painful is around the negotiation of a sale into the onboarding. Once we have the project plan set, things feel pretty good. So that's my indicator, that's probably where I want this process to stop. So for me, I want to focus from book a call to project created. That is the area that is producing a lot of value but is pretty painful. I'm just going to call this the sales to onboarding area in my business for one particular service. Now the distance between these two points is what I'm going to be process mapping today. The distance here is going to tell me how detailed I need to be. In general, the first time you process map, what we want to break it down to are measurable, delegatable actions. So let me give you an example. As we go through the process of booking a call, having a sales call, following up on the sales call, sending your proposals, yada, yada, yada, yada. We want to keep our process map at that level of detail. So each step that I've given here is something that's a discrete action that probably would be its own task, could potentially be owned by its own person, and that is the size of box I want to make. Let me give you an example of what that might look like. A good step in this process might be attend the call, attend the sales call. That is a step. What we don't want to have broken out is say hi on the call, then establish rapport on the call, and then ask questions on the call. You know what I mean? We don't want a minute-by-minute breakdown. We don't want a click-by-click breakdown. What we want is observable actions that are going to take about one work session, which could range from 20 to 90 minutes, and that is the level of detail we want in the actions that help us bridge this gap. But anyway, I'm getting ahead of myself. We'll see more of that as we get into the example. We've established our start and our stop. We have our scope. We have our name for this too. This is going to be our sales and onboarding, combined flow for service. Now, once we clear off our board, we're ready to start actually process mapping. Whahoo, so to get started, we are going to write our first step inside () a circle, which is book call. Now, notice, I am not writing client books call. I am not writing Susie Books Call. I'm not saying Book Call on Calendly. I'm saying, book call. Because technology and people are layers we can add to the process map. If it will bother you to not have that information written down and you want to get it out of your head while you're here, it's not going to hurt anything to write a little bullet point and write, client does this, or Calendly does this. You can write these additional notes, but that is not our focus right now. We're just trying to get the actions down. Now, in our case, we know this ends with the project plan created. So we've got our start and our stop. We're ready to start filling in the process map, which is just the act of asking and answering one simple question. What happens next? That's it. So client books a call. What happens next? From here, a confirmation email. And again, I don't need to write what is sending it, who receives it, anything. Just that there's an email. If I want to leave a note because I want to make sure I don't forget something, I can write it here. Once we have this step, we want to ask ourselves, once again, what happens next after the confirmation email? Are there reminder email is going out? If there is nothing, guess what? We move right on to the next step, which is the call happens. Voila. What happens when there's a delay? In some schools of process mapping, in the more official route, you'll see a half circle icon come up here to say, hey, there's a delay, or a, we need to wait until, these different moments. My approach, and what I'd suggest you to do, is to keep it a little bit more simple. Rather than introducing more symbols, I want you to think about the purpose of the delay. Is the delay in and of itself a valuable action? In the case of baking bread, the delay of waiting for the bread to rise is an important step in the process. If that's the case for you, then we want to make sure that delay or waiting for the dough to rise is in here. Now, in the case of a sales call or most other processes, is there a value to be generated between the confirmation email and that call? No. The delay is there. Yes, we could start to worry about that if we want to. But right off the bat on our first process map, if it's not having an active effort, I would not bother mapping it. So instead Instead, my next step will be call, not wait for a call, just call. Now, once we have our call in here, we're going to return to our question of what happens next. At this point, we might arrive at a decision point. We might have one of two things happen depending on how the call went. What we want to write here is what is the question that will allow us to know which path we're on? In this case, the question might be, is this person a good fit? That could be the question we ask ourselves. If yes, what do we want them to do? We want to make sure we're writing the word yes here. And if no, what else would we like them to do? Yes or no, we're going to be the most common paths you see off of a decision point. But in your business, it's okay if there are other options as well. The only rule is that they are mutually exclusive, so they cannot have any overlap. Once we have this decision point in, we want to ask ourselves what happens next in each scenario. I like to follow the yes or the preferred path and keep working on that till we reach the outcome. Then come back to our deviation and talk about that because I like to have my yes path go all the way straight across, if I can on a whiteboard, or at least up. Then things that are deviations that are taking me away from where I want to go, I like to go down to let me know that, hey, this is not the path I want to go on. That way I can see desired action and non-desired action visually on the map. Again, it's nice to spread these out, but when you're on a physical whiteboard, just make do with the space It's okay if it's ugly. What matters is you get it out of your head. Now, for the sake of example, I'm going to fast forward through completing the rest of this map. All right, so fast forward. I've finished my process mapping. For this very simple process, you can already see how this has a lot of arrows going all over the place and it can feel a little chaotic. But if you are someone who is a physical whiteboarder, I'm assuming you kind of slightly embrace that chaos because that is the beauty of the whiteboard. What I want to do now that I think I'm done is do a few checks. () Number one, does all of my steps, do all of my steps, connect to the end point in some way? So the preferred path, if I have all the desired outcomes, do I reach the outcome? Start to end. Yes. Check. Second check, do all of my diamonds have mutually exclusive paths that are labeled. Let's just look at this. We see an error right here. Are they a fit, yes or blank? Now, I could assume that means not yes, but let's be clear. We're going to change this to no. Check the other ones here. Yes, reply, yes, no. Yes, no. That one's good. Yes, no. We want to make sure that all of our diamonds have these details added in. Step three, we want to look at this map. Go through the steps in our head as if we're doing it and say, Is there anything that I am doing, or the client is doing, in this case, because it's client-facing, that is not reflected on here. So go through the steps. One, two, three. Yeah. No. Okay. This looks like everything. If we do catch something, we send a reminder email. Add that baby in. It is okay that this isn't going to be a beautiful map. It will be by the time we're done. What's important is getting it out of your head and adding those steps in. Now, the next thing we want to do is look at this and start to identify anywhere where we want to dig deeper. Now, you can see I already have some spots flagged on my map, like this one here, where I have this kind of double box icon. We talked about that at the beginning. This double box icon is referring to a kind of a process inside a process, an area or a folder where we could zoom in if we could double click on it and see more details. Because we are Process Mapping on a whiteboard, any of these kind of zoom in moments, we want to make a note of. My suggestion to you would be to grab a notebook and write down the name of any of these kind of double click areas. For this, this could be my no fit process. I want to eventually write this down. I don't want to forget about it. I'm going to write it in my notebook. All these ones that we're writing down are just things to add into the running for future process mapping. For our next map, we also want to prioritize by painful and value. If these things happen to be more painful and valuable than the other areas we had in mind, by all means, we could map them next. There's really nothing else we need to do for this particular process map () than to take a picture and make sure that in our photo, we can clearly see the start and the stop. If at all possible, maybe we want to do this with our whiteboard marker, write a name for this map. We might say sales to onboarding for me. Yours might be fulfillment, yours might be testimonial capture, whatever you want to call it. It doesn't matter at this point, just get it on there. Then we've started to define the major actions. Now that you've got this process mapping journey down, you're going to repeat this exercise for as many functions as your business as you would like to start getting them out of your head. But let me take a pause here and show you how this will connect to where we're going to take this information in the future. So like I said at the beginning, when we work with clients, we tend to map They () map out their entire organization first, all the processes, all the functions, what are they? And from there, we start filling them in. What you're doing by doing this self-directed is that you're focusing on filling in the pieces first, which is fine. There are going to be pieces you miss, we'll catch them. And those missing pieces are what we'll fill in when we work together, or as you go through this exercise, you might catch them yourself. But that is where we're at. But regardless of how you get there, you filling in these steps and process mapping is you defining what your business does. When we fill in all the gaps and we make sure them work together, we're going to move on to uncovering why we do what we do. That's kind of our order. We got what here, why here. Once we have the what and the why, the third place we're going to move into is the who. () So who is responsible for each of these whats? We know why they matter now to the business overall. We know how they support the broader vision. But who supports the what? Who is in charge of them, in other words? This will be the doer, the actor, the person who is going to be responsible. That will be our third step of defining who that person is. From there, we're going to try to make it tactical because if we stop here, all of the what and the why is going to live inside this person's brain. That is great until that person leaves the team, gets hit by a bus, gets old, dies, quits their job or any of those. The only thing we can guarantee about human beings in your business is that eventually they will not be there. So, to avoid the potential crisis of losing that who unexpectedly, we're going to move on to step four, which is the when. By the way, this whole framework I'm teaching here is something we work with clients inside our Foundations program on. So if you'd like help going through this full exercise and you're just ready to finally systemize your business, go ahead and find the link in the description below. We can work together and take care of this whole thing. This is when we're going to start breaking down the ownership into tactical actions, delegatable units, using the what you've already defined. So for example, in my case here, I was talking about sales calls. When are the sales calls? When booked? For you, you might have made a process map of shipping orders. When does that happen? That might be daily. For other people, they might have done their annual process of tax preparation. When does that happen? Annually. In fact, most processes in your business will be a mix and match of seasonal triggers and triggers by outside events. What matters is that we write that down because already, just having that when recorded will make the lives of your doers easier because now they don't have to memorize, Oh, when do I have to prepare our annual report? They know it's the second week of November. They don't have to memorize, when do I give a client a status update? They know it's every Thursday at 12:00 PM. We are already reducing the pressure on this who and making their job more sustainable by getting just this down. But we are not done because there is one more step I got to find my right marker, the how. () And this how is when we get full brain freedom, meaning if this person goes on vacation, it's completely okay as soon as we get this how piece down. How is where we start talking about instructions. So if you remember, when we were process mapping, I told you, hey, don't write too many details. You don't have to make too many bullet points. Keep it high level, because what I wanted you to capture is what happens. And by capturing it, you'll probably also tell us a little bit about when, probably tell us a little bit about why we'll start capturing all these pieces. But I don't want you to go into the details of how on that process map, because frankly, there's no whiteboard big enough. So, once we go through all this, we're going to loop back to the how. For this how step, we're going to focus on instructions, templates, examples, playbooks, anything that we need to allow any who to achieve the what in order to get the why. This is sounding like a Dr. Seuss thing. But one thing I want to shout out about this how part is that this is not stuff created by you. We've talked about process mapping, right? I want you to process map. Wonderful. But unless you are the person responsible for this process long term, you're done. You don't have to do anything else here. Because it is your who that is responsible for defining the how and when. This is kind of your handoff point. Once we define the who, they take the rest of it from here. The who, your assigned owner, will be in charge of creating the SOPs, the instructions, the templates. Your job is to give them anything they don't already have, and that's it. So, if your who is a super junior team member who has never done this thing before, you're giving it to them, but this is literally the first time they've heard of it, what that might look like, as I dropped my marker. This is you right here, you are talking and educating your who on how to do each of the things they need to do. You are telling them everything they need to know, and they are writing it down and writing down the interval. They are doing that. You are giving them the information. They are applying the information to tools for their future selves. If your team is already quite knowledgeable, they already know all that they need to know, congratulations, you don't have to be involved in here at all. They can take it from there. If you are in a situation where you are the who, you are owning this process into the such as your strategic planning, that's a process in here, you want to own that now and in the future, fabulous, then you are the who. Now, one more situation that might come up, what happens if you have a process that you know is important and you have someone in charge of it, but no one knows how to do it. It's something new. Maybe it's something like a financial regulation you have to adhere to, but it's brand new. No one knows how to do it. Well, guess what? Just like you were whispering in your team's ear to train them on something so they could take ownership, there are many experts on the internet who will tell you things about stuff, just you know hypothetically speaking. In that case, if you don't have the knowledge in-house, you can find it externally through consultants, YouTube, books, any resource out there. That will be your input to give your who enough to dig in to the how and the when. Now, at this point, you might be thinking, All right, this all sounds great having the who do all of this stuff, but like, what if they don't do it right? I'm going to be honest with you, especially if If you are whispering in the ear of your who, they're taking on a new area, there will be areas where you tell them things, they write them down, and then they do them, and then something still isn't right. But that's okay because what we have established I don't know how this happened, because what we've established is this cyclical process of information, info, going into a person, and informing a process of when it happens and how it happens. So the new information at first is you teaching the person the thing. Awesome. That feeds into the cycle. But in the future, the information being fed in might be you catching an error. You might say, hey, Johnny, you packed this order. You totally screwed it up. Here's what it's supposed to look like. Here's what it looks like now. Awh, fix it. Johnny's going to take that info and say, Okay, here's what I meant went wrong. I need to change my instructions, and I might need to change my interval of doing the activity to make sure that info is incorporated. You see how we're building a process for building processes. We're empowering Johnny to take ownership so that you or the universe or YouTubers or whoever, all we need to do is get a vessel of information capture. We need to make sure Johnny sees the metrics, make sure Johnny hears our feedback. Make sure Johnny sees mistakes. As long as we have that input continuously flowing, these steps of improving the how and when will continuously improve as well. Which, by the way, this continuous process cycle is something you will be able to measure and see because all of this activity is something that, especially if you work with us, you are going to have at your disposal all within one tab of your browser. We will make sure of that. That's one of the things we do in every project. And so you'll be able to see this whole process happening. It all starts with us understanding what actually happens. By the way, if you're enjoying this, please like and subscribe and share this video someone you know in your network who could use a little bit help building business systems. Thanks for watching and Enjoy the Process!