

Business Processes

It's important that your employees understand your major business processes. They will, after all, be asked to implement them.

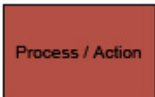







Documenting Company-approved Franchise business processes enables your management to define the key roles and responsibilities for each staff member, in both the short- and long-term. And again, these obligations must also match both the UFOC and Franchise Agreement.

Here are some critical questions:

- Have you brought together any employee handbooks for information?
- Have you solicited descriptions of critical tasks from your staff? Start with the Office Manager.
- Have you considered a few days of "Management by Walking Around?" This is your opportunity to gather first-hand info about what is being done during duty hours.
- What tasks must be performed regularly?
- How will office operation change as the business grows?
- What is the difference between requirements and recommendations?

Mapping Processes

Process Key	
	Symbol/Meaning
	 Process / Action
	 Decision
	 Document
	 Stop
	 Data
	 Dialogue

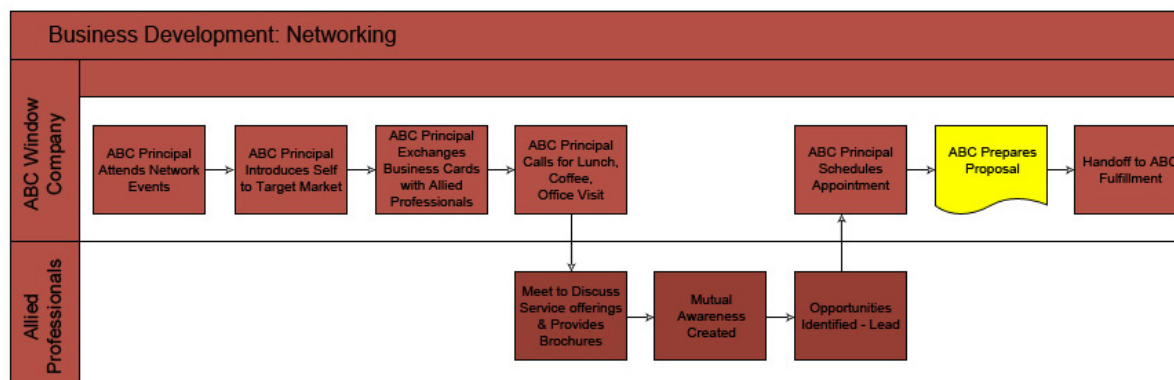
You can map your most critical business processes in any number of ways:

1. Gantt and PERT Charts
2. Flow diagrams
3. Swimlane maps
4. Block diagrams etc.

Whatever pictorial representation will make you most able to see process interactions is the method you want to use. Both flowcharts and swimlane maps use computer programming symbols as seen left.

Processes are rectangles, decisions diamonds, etc.

Microsoft Visio, a simple program to learn, was used to create these charts, such as the following process description as a swimlane map:



Here, each “actor” (or, participant in this business development example) has a “lane in the pool” (or, activity track), and all activities are represented graphically through each stage of the process. Each of the procedures that follow should be mapped out graphically for ongoing training purposes.

Housekeeping

Because customers, prospective employees, and other business owners will visit your franchise periodically, you must ensure the office is cleaned periodically. Some Franchise owners hire a service to do this after hours; you may choose to do this at your own expense, or you may choose to have the staff handle the periodic cleaning chores. It is possible that some staff members find some cleaning jobs distasteful: for that reason we recommend responsibilities be rotated. Each staff member must contribute to clean-up unless there is evidence of an allergy.

Here are the critical clean-up areas:

- Reception
- Cafeteria / Break Room (especially the microwave, if any)

- Bathrooms
- Receiving
- Shared workstations
- Any other common areas where visitors will pass through

Individual offices can be left the responsibility of the occupants, but those offices must still be straightened up regularly.

Opening & Closing

These procedures are critical; they should be kept on a list and kept current, in case the Office Manager quits or goes suddenly on medical leave. If nobody knows how to open the office, the whole Franchise will shut down.

Office Manager.

Arrives at the office 30 minutes prior to general business hours. This provides the necessary time to prepare for business before technicians arrive.

Unlock office

1. Disable alarm (if any)
2. Check messages on voicemail; distribute to staff
3. Ensure that technicians are on hand for necessary jobs; assign to jobs
4. Sign out vehicles, if needed
5. Brief staff on any news; make sure everyone is on the same page
6. Verbally confirm that employees know their assignments
7. Briefly cover any issues needing immediate attention
8. Perform equipment check
9. Check e-mail; respond to any time-critical messages

Technicians (at the end of the work day)

1. Turn in task folders to Office Manager, including receipts, if any
2. Turn in damaged equipment or parts to Office Manager for possible replacement, or turn in requisition forms for replacement of equipment too damaged to repair
3. Return any phone calls and/or time-critical e-mail messages
4. Ensure that vehicles are clean, secure, and ready for the next work day; turn in gas receipts, if any, to Office Manager

Vehicle Checklist (for Technicians)

1. Doors locked
2. Equipment removed or stored in trunk
3. No valuables left
4. Parked in secure location
5. Enough fuel to begin the next work day

Office Manager (at the end of the work day)

1. Go over next day's schedule with all available employees
2. Store confidential data, e.g. credit card receipts, under locked conditions
3. Store any items of value under locked conditions
4. Lock doors and windows

Miscellaneous Duties

These jobs, and others, may be assigned to particular people in the Franchise, or as needed to outside contractors or facilitators.

- Long-term planning
- Business development (e.g. outside sales, Internet and affiliate marketing)
- Business accounting and finance
- Human resources
- Purchasing
- Franchise Agreement compliance
- Communications / technology
- Legal
- Records storage
- Equipment management
- Media relations
- Banking
- Safety and security

Activity	Details	Responsibility	Frequency / Time Frame
Strategy / Budget	For the following year	Owner/GM	Nov/Dec
Annual Review	To Company HQ	Owner/GM	Jan
Taxes	Complete federal and state tax returns for previous year	Owner/GM	Jan/Feb
File Records	Keep current year records, plus 1 year historical records	Owner/GM	Jan/Feb
Equipment Review	Status report; maintenance plans	Staff	Nov/Dec
Insurance Review	Annual risk assessment	Owner/GM	May/June
Marketing Plan	Analysis and update	Owner/GM	Quarterly

Performance Reviews	All staff	Owner/GM	Quarterly, annual salary adjustments
Annual Meeting	At Company HQ	Owner/GM	October
Licensing	Review and renew	Office Manager	As needed
Real Estate	Review and renew	Owner/GM	As needed
Software	Review and upgrade	Office Manager	As needed
Security	Review and renew	Office Manager	As needed

Administrative Management Checklist

Activity	Details	Assigned	Frequency / Time Frame
Payroll	Direct Deposit on Wed.	Office Manager	Every 2 weeks
Bills	Pay on Fridays	Office Manager	Every 2 weeks
Accounts	Report transactions	Office Manager	As needed
Reports	To Owner and HQ	Office Manager	As prescribed
Franchise Payments	Pay fees to HQ	Office Manager	Monthly
Delinquencies	Monitor delinquent customer accounts	Office Manager	Weekly
Inventory	Monitor supplies	Office Manager	Weekly
Backups	Hard drives, etc.	Office Manager	Weekly
Banking	Balance accounts	Office Manager	Weekly
Housekeeping	By professional service	Office Manager	Monthly
Support	Marketing materials, etc.	Office Manager	As needed
Utilities and Building	Services, maintenance scheduling	Office Manager	As needed

Security & Safety

Material Safety Data Sheets

Federal law requires that all MSDS must be kept on hand and readily accessible in both the office and anywhere else within the Franchise where hazardous materials are used.

Ensure all employees know where the MSDS are kept and follow all applicable government and industry safety guidelines.

Alarms, Locks and Keys

Keys and passwords to alarms should only be provided to managers or employees who have demonstrated a history or trustworthiness. Periodically change the alarm password, especially after the termination of an employee contract.

Inventory

The Company inventory system provides you with the ability to track inventory levels and reorder points.

Restrooms

Because restrooms will sometimes be used by customers and other visitors, it must be kept clean and well-stocked. Develop a weekly cleaning schedule and ensure that it is followed.

Your first responsibility is the safety of your employees and customers. Even in an office there are safety considerations, such as

- Smoke detectors / fire alarms
- Security system
- Panic button, if needed, with security system
- Proper storage of dangerous chemicals, with MSDS on file
- Anti-poisoning kits
- First-aid kits