



# BUSINESS PROCEDURES

As Bad As You Make Them

# Ready to talk procedures?

- Assume the position...



# Procedures most definitely ARE



BORING



LABORIOUS



DIFFICULT



USELESS

# Procedures CAN BE



~~BORING~~

~~LABORIOUS~~

~~DIFFICULT~~

~~USELESS~~

ENGAGING

QUICK

EASY

VALUABLE

# Value of high quality, useful procedures

- Training new staff
- Maintaining **consistency**, repeatability and **quality** of activity
- A credible, well managed business
- Visibility and knowledge of **what actually happens** in your business
- Making life easier and faster for everyone, including you

# Procedures fit within a broader framework

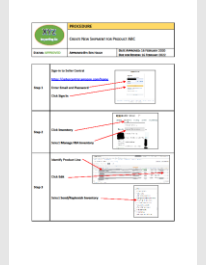
- Policies — "Intent" WHY
- Processes — "Tasks" WHAT
- Procedures — "Steps" How
- Protocols — "Rules"

Procedures need Processes to give them context...

# Imagine creating a new shipment.

- How long did it take YOU the first time?
- How long should it take?
- Shipments are quick and easy – but what happens if something wrong is selected?
- Do you expect a newstarter in your business to be able to do this quickly **and flawlessly**?
- What if **you** don't do one for 6 months - do you expect to be able to do it **quickly and accurately**?

# Demonstrate procedure for creating a shipment



- Visual, minimum words
- Screenshots and Arrows, faster to understand, unambiguous
- Short, specific document
- Easy to follow, easy to scan
- Fast to create
- Gaps in procedures are obvious



# How quick and easy are they to create?

- Let's find out

# Procedures fit within a broader framework

- Policies
- Processes
- Procedures
- Protocols

<https://www.youtube.com/watch?v=YPOc-c2iO1g>

# Example Policy

POLICY		
ENVIRONMENT AND SUSTAINABILITY		
DOC STATUS: APPROVED	AUTHORISED [REDACTED]	APPROVAL DATE: 7 JANUARY 2020 REVIEW DUE: 6 JANUARY 2021

This Policy shows our commitment to:

- the environment
- sustainability

#### Context

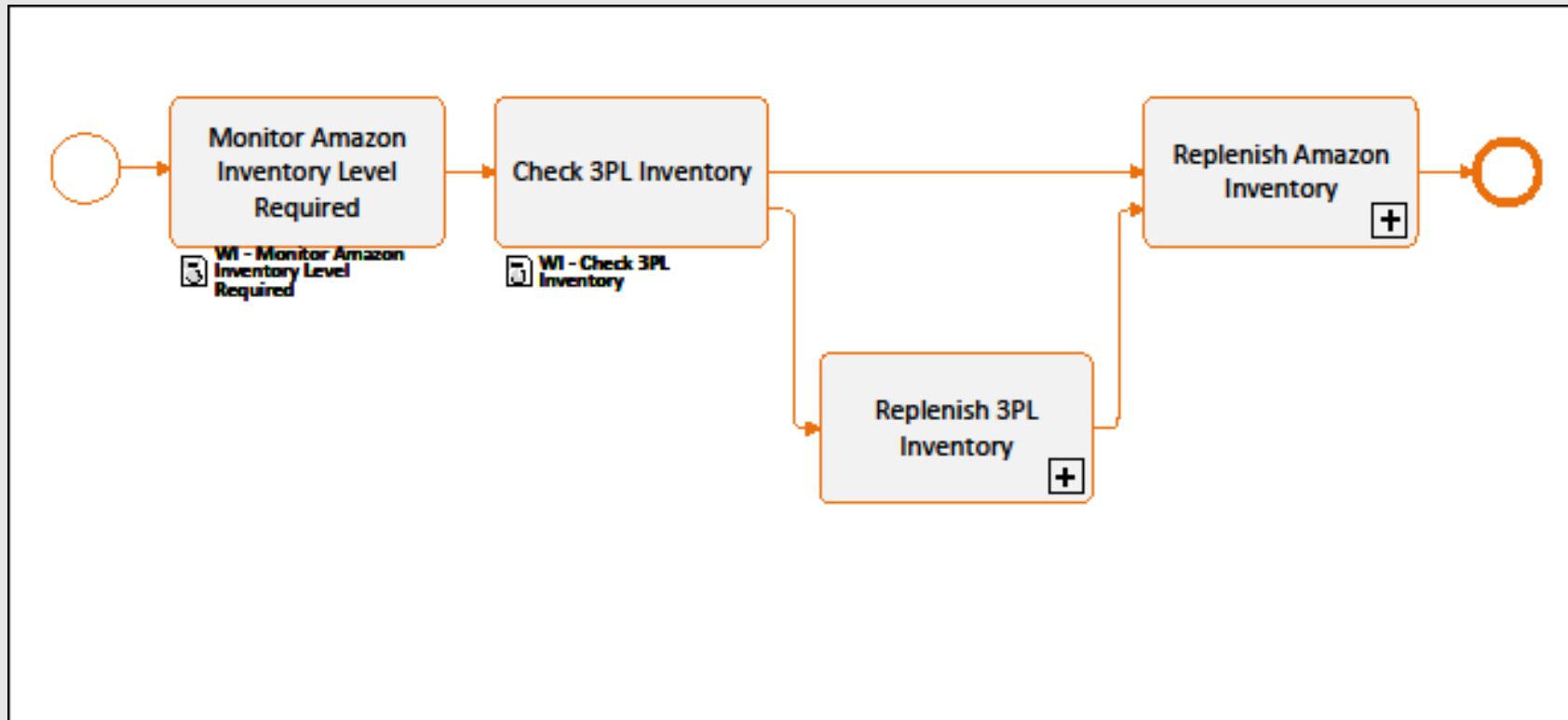
- the environment is under duress due to excessive human activity
- as the environment deteriorates, there will be adverse outcomes for society and therefore [REDACTED] and its staff, clients and stakeholders
- [REDACTED] accept that we have a duty of care to minimise or eliminate activities that contribute to the harm of our environment and to promote activities that benefit the environment

#### Our organisation must:

- create a culture that is aware of our environmental and sustainability duty of care
- minimise or eliminate any harm our activities might cause to the environment
- promote reducing, eliminating, reusing and recycling
- comply with all relevant legislation, specifically in relation to environment and sustainability
- if applicable, work with our stakeholders to assist in the reduction of harm to the environment

# Example Process

## MAINTAIN INVENTORY LEVELS



# Example Protocol

PROTOCOL		
DIFFERENCES FOR CONSULTANT LEVELS		
DOC STATUS: APPROVED	AUTHORISED BY: [REDACTED]	APPROVAL DATE: 13 SEPTEMBER 2016 REVIEW DUE: 13 SEPTEMBER 2018
Elements	[REDACTED]	[REDACTED]
Bonus	Same	Same
Base		Higher
Work	Output discreet, project will usually be a component of a larger piece of work	Outcome defined, ambiguous pathway
Career Path	Senior Consultant	Ownership potential
Timing	Best for organisation, individual, work-load	Best for organisation, individual, work-load
Client	Is with front-line, front-line Manager and Senior Manager comfortable	Is with CEO/GMs. Able to discuss ideas with gravity, purpose, selling ideas and solutions, own relationship
Sales	Opportunity identification	Accountable cross-sell
Internal		Leader/coach/guide
Generalist	1-2 areas	Breadth and depth 3-4 areas
Specialist	1 area	Breadth and depth 1-2 areas

< hit me with questions >