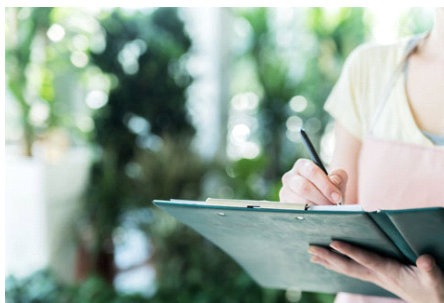


## Features

9/1/2020

## Plan Now for a Smooth Spring

*Katie Elzer-Peters*



When I talk about process documentation I sound like an infomercial spokesperson. “In just three days I completely changed my business!” “Follow this XX-step plan and you’ll be on your way to record growth!”

Let’s turn you into a process evangelist, too. First, think back to the spring. (I know, nobody wants to go there. But we have to because before we know it spring will be here again, not to mention the holidays.) Curbside pickup chaos. Juggling inventory for online and in-store sales. New procedures for managing traffic, checkout lines, cleaning. Improvisation

every day. But hey—you did it!

If you’d rather not repeat the chaos, right now is the time to sit down, evaluate what worked and what didn’t, and document the processes for what worked so you can recreate them next year. And, if you didn’t reach a process that worked, maybe now you can take some time to figure it out. The holidays will give you another dry run at curbside pickup and delivery, at (likely) slightly less volume. Here’s why you should block out uninterrupted time to spend on this crucial piece of business management.

### Continuity and Consistency

Process documentation is, well, what it sounds like: documentation (writing down or videos) explaining and/or showing the steps to complete a process from start to finish. Someone should be able to pick up your documentation and, without consulting anyone else, complete a process—or at least understand how to do it.

The biggest reason to document processes is to make training easier. Most business owners reading *Green Profit* employ at least a few seasonal workers. At a minimum, you’ll end up training new people every spring. It’s a lot easier to train if you can hand someone a guidebook.

Another very real consideration is that there’s a highly contagious virus spreading that could take down you or one of your key staff members at any time. Wouldn’t it be a shame if knowledge that’s key to running your business was unavailable for a time?

Having clearly documented processes also allows you to pivot or change quickly and respond to improvements in technology or changes in the marketplace. As Sam Kirkland, Strategic Relationship Manager for Epicor Software Corporation, says, “Processes allow companies to be nimble, but with purpose.”

Finally, by writing down processes, you can ensure continuity of experience and comfort for your customers. If all

staff follows the same procedure for managing crowds, running checkout lanes and fulfilling orders, customers will know what to expect when buying from and/or visiting you. Delivering “as expected” alleviates anxiety in customers, which makes them more likely to return.

## Four Key Sections to Include

All process documentation has four main sections: Assets, SaaS (Software as a Service), Steps and Outputs. Everyone remembers to include the steps, but without the list of assets, SaaS and outcomes, documentation isn't complete.

### Assets Required

Write down all of the people and things needed to complete the process. People might include the Marketing Manager, Customer Service Representative, etc.; documents could be related spreadsheets or user manuals—bonus points for linked Google Docs; and equipment can be high tech such as a computer or iPhone, or lower tech like walkie-talkies, sharpies or masking tape.

### SaaS Required

SaaS ranges from email marketing software such as MailChimp to your website platform (Square or Shopify, for example) and filing software like Dropbox or GDrive, your inventory system, graphic design programs or irrigation controls. If it's software that you use to complete the process, write it down.

### Itemized Steps

Itemized steps are descriptions of the process broken down in steps from start to finish.

### Outputs

This is the outcome if the process is correctly followed. It's the indication of completion and for process documentation to be complete this has to be identified.

## How to Get Started

Create a little worksheet and then circulate it through the people involved in the process. (If you can do this as a Google Doc, even better. That lets people make edits collaboratively. Here's a quick how-to video: [tinyurl.com/googledocprimer](https://tinyurl.com/googledocprimer).) Providing a framework or outline will speed things along. Here's a brief outline for curbside pickup documentation:

#### Assets

People: Order puller, website administrator, customer service representative, online marketing manager

Documents: Confirmation email, order printout

Equipment: Sharpies, walkie talkies, iPad, computer, boxes

#### SaaS

Website back-end, GDrive, inventory system

#### Itemized Steps

Receive order (please elaborate)

Process order (please elaborate)

Pull order (please elaborate)

Alert customer for pickup (please elaborate)

Stage order for pickup (please elaborate)

Follow up (please elaborate)

Outputs

Customers receive their (accurate) orders on time

Inventory records are accurately updated

The best people to fill in the skeleton of documentation are the ones who do the job. They'll remember steps that you, as a business owner, might not even know are part of the process. If you're concerned that staff won't be able to fill out the documentation without help, schedule a few meetings to get their "brain dump" and organize it. Talk them through the steps and write them down. Assign an official note taker to help you.

Here are a few tips for getting the initial draft on paper:

- Collect all info and don't be too worried about the exact sequence at first
- Identify missing documents/links/information needed to fill in at a later time (you don't want to get stuck; just write LINK NEEDED and move on)
- Indicate roles instead of names for responsibilities. For example: use "Ecommerce Manager" instead of "Tracy Smith." (That way, if someone leaves, you don't have to edit their name out of all the documents.)

## Add Pivot Points to your Process

Let's call this "advanced process documentation." Once you have processes documented you can annotate those with pivot points or if/then scenarios based on changes in data, allowing you to be, as Sam says, "Nimble with purpose." Data is just noise unless you know where and how to use it, and identifying where data evaluation and action based on data goes in your processes can help you make more use of it.

Sam says, "Most of today's technology offers dashboards. You can look at pie charts and graphs, and see what is going on that day." Sam recommends that organizations, "manage by exception." He says, "If everything is green, you're golden, and can take care of employees and customers. If you see red, decide what to do. For example, if it is raining and volume is low, send hourly staff home. There's always someone happy to go home."

If you've completed process documentation with your pivot points annotated, you've already made the decisions and you can just carry them out when the time comes. This removes stress and allows you to allocate your resources efficiently.

## Evaluate and Update

So what happens once everything's on paper? Ideally, you and your staff adhere to processes, and you schedule time to periodically review your documentation. This will serve as a refresher if things have gotten fast and loose at your business, resulting in problems. It's also necessary so that your business "user manual" reflects what's actually happening day-to-day.

Process documentation isn't the most interesting part of running a business, but it's one of the most important because it'll help you stabilize and grow. Schedule your process doc working sessions now before you get busy

again. In springtime, you'll be glad you did. **GP**

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