PLATFORM

STREAMLINE YOUR SYSTEMS

The Task Timer

The Goal

To gain an understanding of the benefits to systemising and the recommended process of systemising your business.

Money Made or Saved

By gaining an understanding of the recommended way to systemised, a considerable amount of time will be saved when actually systemising.

#RightNextThing

Start Systemising

The Task

The Task	The Time
• Do online training on MyLifestyleTradie.	1 hour
• Download the Systems Solution Model.	15 minutes
• Review the 10 Steps in the Systems Solution Model and understand the process of systemising the business.	1 hour
• OPTIONAL: Print the Systems Solution Model and put it up on the wall where you will be systemising as a constant reminder of the process.	15 minutes

The Task Timer

The Goal

To complete the first 2 steps in the Systems Solutions Model (Plan it and List it). A plan for systemising your business will be created and and a list made of all systems that need to be built.

Money Made or Saved

With the proper plan and action list created time will be saved as there is complete clarity and direction.

Plan and List It

The Task	The Time
• Do online training on MyLifestyleTradie.	1 hour
• Download The Systems Commitment and complete.	15 minutes
• Download the Systems Project Plan template.	15 minutes
• Nominate and decide on a Systems Leader.	30 minutes
• Meet with the team to give them the heads up about the Systems Project and announce the System Leader.	1 hour
• Meet again with the Systems Leader is to agree project milestones.	1 hour
• Download the Power Push Listing template.	15 minutes
• Make a list of all the processes you can think of.	2 hours
• Add the list of processes to the Systems Project Plan, Phase 1 - Column B (from Plan It).	30 minutes

The Task Timer

The Goal

To capture all the information required for each of the processes in the business.

Money Made or Saved

By capturing all the information required for each of the processes, time and hence money will be saved as the systems can be built with minimal intervention from (and interruption to) others moving forward.

Capture It

The Task | The Time

The Task	The Time
Do online training on MyLifestyleTradie.	1 hour
Agree on what order to capture the processes with your Systems Leader.	1 hour
For each process in the list, have the Systems Leader decide on who the Knowledge Holder is and update Column F in the Systems Project Plan template.	2+ hours
For each process in the list, have the Systems Leader decide the best way to capture the detail and update column G in the Systems Project Plan template.	2+ hours
Select the first process to capture and either book in a time to shadow or interview the Knowledge Holder OR provide instruction to your knowledge holder as to the deadline associated with capturing the steps of the process.	30 minutes
Capture the draft detail of steps taken in the process.	15+ minutes
Once complete, update column H & I in the Systems Project Plan template as to where the draft details are saved and what date they were completed.	15 minutes
Select the next process to capture and either book in a time to shadow or interview the Knowledge Holder OR provide instruction to your knowledge holder as to the deadline associated with capturing the steps of the process.	30 minutes
Repeat the previous 3 steps until all processes listed in the Systems Project Plan template are captured.	15+ hours

The Task Timer

The Goal

To implement a file naming system to catalogue all systems documents so they can be found easily.

Money Made or Saved

By implementing a file naming systems along with secure data storage, all systems will be easily located and the information will not be at risk of loss, theft or changes made in error.

#RightNextThing

Store It

The Task

The Task	The Time
• Do online training on MyLifestyleTradie.	1 hour
• Decide on the Naming Convention to use.	1 hour
• Set up the file hierarchy.	1 hour
• Update each draft document for each process with the new file name and save in the agreed upon location.	3+ hours
• For each process, update the "Saved to:" location in column G on the Systems Project Plan template.	2+ hours

The Task Timer

The Goal

To build out all processes, policies, procedures and supporting documents required from the draft materials that have been captured (in the module Capture It).

Money Made or Saved

Money saved (no mistakes) and money made (time and resource efficiency) by all staff being able to complete their role, or others, with confidence through following systems. Training can be efficient and effective without the need of large staff resources.

#RightNextThing

Build It

The Task	The Time
Do online training on MyLifestyleTradie.	2 hours
Research options of software to use to build the flowcharts (We recommend you include Lucidchart in your comparison).	3 hours
Decide on the software to use.	1 hour
Contact software company and set up account.	1+ hours
Build the first Flow Chart.	1+ hours
Collate the Policies, Procedures and Supporting Documents or linked information and store in agreed upon location.	1+ hours
Update column J, K & L in the Systems Project Plan template as to who built the process, what document type it is and what date it was completed.	15 minutes
Build the next flowchart.	1+ hours
Repeat the previous 3 steps until all processes listed in the Systems Project Plan template are built.	15+ hours
Return the draft of the Flow Charts to the Knowledge Holder and have them review the Flow Chart or Supporting Documents created from the drafts captured and confirm it is correct.	4+ hours

• Dependent on feedback, address any corrections or alterations recommended by the test run in the Flow Chart and system documentation.	1+ hours
• Save the final draft to your Master Files.	1+ hours
• Update column M & N in the System Project Plan template as to who tested the process and on what date.	1+ hours

The Task Timer

The Goal

To set up a cloud based sharing platform to house your processes, policies, procedures and supporting documents as well as a project management tool to maintain accountability for the completion of processes.

Money Made or Saved

As everyone has access to processes, policies, procedures and supporting documents, staff are able to work more autonomously and with increased productivity (leading to time and money saved).

#RightNextThing

Share It

The Task

The Task	The Time
• Do online training on MyLifestyleTradie.	2 hours
• Research options of software to use as your cloud based sharing platform (We recommend you include SystemHub in your research).	3 hours
• Decide on the cloud based sharing platform to use.	1 hour
• Contact cloud based sharing platform company and set up account.	1+ hours
• Learn the new cloud based sharing platform you have chosen.	3+ hours
• Build out the cloud based sharing platform.	10+ hours
• Update columns T & U in the System Project Plan template as to where the process was shared and on what date.	1+ hours
• Research options of software to use as your project management tool (We recommend you include Asana in your research).	3 hours
• Decide on the project management tool to use.	1 hour
• Contact project management tool company and set up account.	30 minutes

- Learn the new project management tool you have chosen.

  1+ hours

- Set up the project management tool.

  10+ hours

- Create links from your cloud based sharing platform to your project management tool.

  3+ hours

- Download all relevant processes for field staff and create them into a PDF document.

  3+ hours

- Save the field processes PDF to each of the devices from the field.

  1+ hours

The Task Timer

The Goal

To communicate to the team, the new systems that have have been developed and how they can access them. Additionally all staff will be trained in how to use the relevant software.

Money Made or Saved

By taking the time to educate the team on the new software they need to be familiar with the end goal will result in money saved through eliminating inefficiencies.

Launch It

The Task	The Time
• Do online training on MyLifestyleTradie.	2 hours
• Confirm the date when your Systems will go live.	15 minutes
• Set a meeting that all staff will attend.	15 minutes
• Conduct staff meeting emphasising the value of systemising the business, and the importance of following processes to achieve consistency across all roles.	1 hour
• After the meeting email the team with the relevant links to the documents or processes they need to complete their role.	1+ hours
• Conduct training for your office staff on the new systems.	2+ hours
• Conduct training for your field staff on the new systems.	2+ hours
• Update column V, W & X in the System Project Plan template as to how the training was conducted, by who and on what date.	1+ hours

The Task Timer

The Goal

To monitor the teams use of the processes and the results the processes deliver.

Money Made or Saved

By ensuring the processes are being followed in a timely manner, the business will operate more efficiently and staff will be held accountable to their performance.

#RightNextThing

Monitor It

The Task

The Time

- Do online training on MyLifestyleTradie.

  1 hour

- Establish how you will measure whether a task has been completed.

  4+ hours

- Update column Y & Z in the System Project Plan template with the agreed upon form of accountability and on what date.

  1+ hours

- Check in on the agreed form of accountability.

  Ongoing

The Task Timer

The Goal

To always ensure processes are continually being improved and maintained to keep them current and up to date.

Money Made or Saved

It has taken a large investment in time to ensure your business is completely systemised. Ensure you take the time to keep everything up to date so that this exhaustive process does not need to be repeated.

Improve & Maintain It

The Task

The Task	The Time
• Do online training on MyLifestyleTradie.	2 hours
• When it arises, update and improve processes for a better solution.	1+ hours
• Once updated, complete column AA & BB in the System Project Plan template with the Approved update and on what date.	1+ hours
• Agree on the frequency each process should be reviewed (dependent on how often they are used).	3+ hours
• Update column CC, DD, EE & FF in the System Project Plan template with the last review date, by whom, what action and when the next review will be.	2+ hours