



YOUR TEAM SUCCESS PODCAST

The Power Of Documenting And Communicating Your Processes

Shannon Waller: Are some of your processes feeling slow? Do you feel like you're getting bogged down? Stay tuned to listen to how to revamp, revitalize, and re-energize your projects and your processes to get a much, much better result. Hi, Shannon Waller here, and welcome to Team Success. Today, I want to talk to you about something that you undoubtedly know, but may have forgotten, or other things may have prioritized ahead of this, and this is the importance of process, and of documenting them, aka writing them down, and communicating them to other people. Now, I'm someone who likes to start a lot of projects, do a lot of things. I can get really clear on the end result—the middle bits, not so much—but I was working on a couple of projects with people and actually working to make them better. And what was super useful was delineating all of the steps, who's doing it, and when. And we have a fabulous tool in Coach, which is not in one of our small books. So you'd have to be in Coach to have access to it.

It's called the Unique Method. But even if you don't, frankly, you can use a piece of paper and that would be just fine. And if you want to picture what Unique Method looks like, it's 12 boxes in a horseshoe shape, okay, with a box for improvements in the middle. So if you can just imagine a graphic representation of a flowchart or a process, that's really what we're talking about. So don't want you to get dissuaded by not having the tool in front of you. However, I am in my mind talking it through. So why is it important to delineate the different steps of a process? Well, it could sound sort of automatic and intuitive, like, of course, but what happens is when companies are moving fast, when we have new people that we're hiring, when we've been doing a process for a long time, but maybe the marketplace has changed, technology has changed, the people doing the process has changed, it can be really, really important to update it and to make sure that it's still current.

So I'm going to suggest as an action item when you finish this conversation, or when we finish this conversation, that you look at where are you getting bogged down, where are you getting stopped, and where are things taking forever and a day. And that is a project that is ripe for reviewing the process that you are going through. So it is just critical. And actually, I did this with a friend yesterday. It's been top of mind. There's three examples in the last five days where I've sat down to revamp a process or written down a process from the get go. And the nice thing about my version of a process, it is very bottom line, very succinct. I don't get into every single detail. There is room for that. Don't get me wrong. And people doing long, complex processes. For instance, even if you're updating a database, doing a certain type of find might have its own 6 or 7 or 8 or 10 steps. So sometimes processes have subprocesses. It's a thing. But depending on your attention span, even just having the clear list and the clear graphic overview can be extraordinarily helpful.

One of the fun things that I did with Unique Method is to recontextualize it as a Unique Ability relay. And I actually am holding in my hot little hand right now a red aluminum baton, the same type that they use in relay races. And I take it everywhere with me because it proves to be



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incredibly demonstrative because it shows what happens when you've got a really good handoff. Now, it's kind of fun. I'm Canadian. I'm in Canada. In the last Olympics, Canada won the gold for the four times 100-meter relay. And it was fascinating because not a single one of the runners had won the 100 meters, even though there were some very, you know, well-known famous runners. How did they win? They won with the handoff. And some of our main competitors, and perhaps the country from which you're listening, did not do so well, and their handoffs were terrible. No offense, but they were. They were just bad. So one of the things that's really key is clearly identifying what the step is, then making sure the right person, the right runner is in the right place in the race.

And number two, don't drop the darn baton. Yes, it's in my hand. And so I will often, in fact, I've done it for my last two speeches, demonstrate this on stage. Highly entertaining. I do it when I'm coaching. You know, there's something we call the delegation death grip when you are supposed to pass it to someone, but you don't let go. And if they're sitting in a rolling chair, I will literally have them not let go and pull them across the floor. Again, very fun. I like to make this very visceral. But this is what happens if we don't have the right person in the right place in the race, or we don't let go of the baton, or we don't pass it appropriately, or we throw it at them. We call this a drive-by delegation. We just don't have a really good handoff for it. So we're not clear on what is required. We're not clear on the timing. It doesn't work very well.

And so when you actually look at Unique Method, and it's really a Unique Ability method, that's to shorten down a little bit, what you do is you work to delineate the steps. And then if it's a brand-new process, you figure out the right Who, and you might not have all of them. That's okay. Just put the type of person that you need, like project manager or timekeeper or what have you. And then you write down what the next step is, and what is the timing expectation? How long should this take? So I was helping someone figure out a hiring process. There were two people involved in the process. Each of them had a step. Actually, there was a third person who could send out codes for profiles, because that's a good part of any hiring process, just saying. And it was really fun to kind of like, okay, which step comes first?

And the nice thing about a hiring process is at any stage, there could be an exit. If the candidate is not successful, they're gone out of the process. So at any point, you can go, do not proceed, do not pass go, do not collect \$200. But then what's the next level, the next level. And so what I did was I wrote everything out with the right Who's, and I also started adding in the timing. Because you don't want to spend three months hiring a candidate; they'll probably have moved on in their job search to another company. So you really want to take advantage of timing—making sure it's not too rushed, that would also be bad. You don't want to hire the wrong person and have to start all over again, but then also making sure that you're moving with some speed, with some velocity through that process. So that's when you're starting a new process.



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But what if, like I was doing last week, you are taking processes that already exist, but they've gotten long, they've gotten clunky, they've gotten hard. I love Joe Polish's expression, hard, annoying, lame, and frustrating. Now, he applies that to businesses. I also apply it internally to internal processes, because that's what had happened with one or two of ours. So what had happened was one of the Who's in there didn't want to be doing that anymore, just didn't. And so I had an idea for who another person would be, who was incredibly talented and absolutely fabulous. He added some new technology to the process. We shortened a process from 12 weeks down to three. I am thrilled with that result. But the people that were doing it before were just stuck. They did not know that they could take action. And I, of course, come in because I'm not a patient human. I'm like, guys, this is taking way too long. I was experiencing the results of the process and it taking forever. I'm like, we have to revamp this. This is not working. What are the problems? Let's look at it. And what was fun about the conversation was there was no blame. It just identified where were the problems and then how can we put our, quite frankly, combined significant intelligence to fixing it. It wasn't just one other person. It wasn't just me. We added in a third. I'll be doing another podcast on teamwork triads very soon.

So we made sure we had at least three people because all of us together could have a different angle, part of the process that we were paying attention to, and a different idea about how to make it faster, easier, cheaper, with a bigger impact, which are always the results that we're looking for at Coach. So I just want to stress that having a tool like Unique Method makes it easy. But even if you don't have access to it, just to take a look at the process, just write down what is currently happening. Write down what's taking a long time. Write down where it's feeling arduous, where it's feeling really time-consuming, or the person doing it, he doesn't love it. You know, we actually completely changed the process the other day, because one of the people involved doesn't actually like that main activity. Hadn't spoken up, but it was getting kind of obvious, and the person was just a little bit shy. So we just changed the process. We're kind of committed to people doing what they love to do and are best at here, Unique Ability. And so we didn't want someone as part of a process that they hated. So we brought in someone who loved it. For that person, it was an opportunity. It was great, and it was not hard to do. So I have to tell you, it makes things so much more fun.

So if you are committed to getting excellent results, you can either try and beat people into doing what it is that you want them to do. Frankly, very short-term strategy. My estimation, it never works. Or you could actually put the right people in the right seat, as EOS talks about, have the right runner in the race, if you like the race analogy, and just get really, really clear on who's doing what and by when. Again, this is not something you don't know. It's incredibly logical, but it doesn't mean that we always do it. So, I want this to be a prompt in your current system today to take a look at where's a process that you have been experiencing, maybe



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you've been at the end of it, maybe you're a part of it, that you're like, this could be better. Good. This is a chance for you to maximize results and streamline it. Again, not by blame, not by trying to fit a square peg into a round hole, but just to kind of revamp it and relook at it, what you're going to find, I'm going to hazard a guess, is that 60 to 80% of the process is fine, maybe even more. But if you can change one or two steps, we use 12—it's not a 12-step program, but still, there are 12 steps. If you can fix or tweak or even change the order of or bring in new technology or new who on one to three of those steps, it's kind of amazing just how much better it gets and how quickly it gets better.

I am so stoked that this process we just put into play last week, we had it done in a couple of days. It took less than three weeks, to be honest. And I was stoked. I was like, yes! Then we get to celebrate the wins. It's so fun. So really key that you take a look at your process, figure out, okay, is the right Who involved? Do we even have the right Who? Can we outsource it if need be? Do we have the right technology? Because technology is also a Who. And then really specified timing. That is one enhancement to Unique Methods. So we've got a little Who box, but we usually write in the small little connecting arrows, what the timing is can be very, very clear. One time I was working with a colleague, she was editing something for me. So I thought I conveyed urgency in how I spoke about it and how I, you know, passed it off and that kind of thing. And then a couple of days later, I was like dying because I really needed this thing back quickly. And so I went over to her office and I'm like, what's going on? What's going on? She goes, I did it the other day. It's on the corner of my desk. I was like, oh my God. Geez, you know, so the handoff didn't come back, but did I do enough to specify it? Probably not.

So again, it's making sure that those little connection points are made, are clear, you'll get it back by this deadline, making sure you ask what the deadline is, because you could be that person going, oh, I didn't realize it was so urgent, or I thought you would come back to get it, not that I needed to go and give it to you. Those dumb little things trip us up all the time, and I just want to save you the pain that that I experienced because it's not fun. So anyway, I don't want you to experience the same pain that I did. So hopefully you can take this under advisement. And again, when you're doing the handoffs, you want to make sure you're really clear what needs to be done, how well, and by when. I'm a 3 Fact Finder, 2 Follow Through on the Kolbe MO. 3295 is my whole MO. So when I ask for information, I'm kind of looking for three key pieces. I'm not looking for the entire novel about it because there are three key pieces of information I probably need in order to make the next right decision.

But someone else who is naturally a 7 Fact Finder might think, oh, I need to go and do three week's worth of research. So I may come back and go, can you spend actually about two hours? Because that's what I think this is worth. I don't want to invest more than two hours of your very valuable time when you can be doing other things. It doesn't take three weeks. I want what you can figure out in two hours. So we kind of have to negotiate that. And again, that's why I find it so useful to understand profiles and to appreciate that we cannot read each



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other's minds. It is vital, in fact, to just be really clear and articulated about how you think and what it is exactly that you're looking for. To bottom line it, I just really want you to outline your processes that you're currently doing. The ones that are working really, really well, great way to document them. Please put them in some kind of a spreadsheet somewhere or some kind of a document so other people can access it. But the fun ones to work on are where you can make things, as I said, faster, easier, cheaper, with a bigger impact. That will give you such a win. It's not even funny.

Or if you're laying out a new process that you haven't done for a while, you know, like the hiring one, they hadn't done this one for a year. And so laying it out to make sure everyone was aligned with the expectations about who was doing what and what the final result would be in meeting about that just means that everyone is literally and figuratively on the same page. It also helps you eliminate, you know, missing steps. When I outline a process, I'm going to outline maybe six or seven steps. When I go and talk to people who are much more systems oriented, they usually add about 10. Seriously. So it's kind of funny. You get to see how different brains work on different things. And I'm very open to that. They know stuff that I will never know. And I'm really grateful they know it so I don't have to. And so that allows for that meeting of the minds, but at the same time, you can be clear on the end result.

Now, one other example I want to share with you before I leave you some cool other resources. So this example comes from a long time ago when I was working with a really brilliant colleague named Anon. She had a record number of sales for the two weeks she was on my sales team. I was like, oh my gosh, that was great. And, you know, let's do that again. And she had gotten 20 sales. So that was kind of a record for our team in a two-week period. And she goes, no, I never, ever want to do that again. And I was like, what? Why not? This is not good. She goes, because every single one of those sales took 24 different steps. I was like, oh my gosh. So I'm like, let's go through those, because that's crazy. That's a lot of work. So we went through, and we slashed and burned. We cut out steps. We combined them. We delegated some other ones out. We simplified this sucker down to 12, 12 steps. We were really rigorous about using the Unique Method. Afterwards, I'm like, okay, now how do you feel? She goes, okay, now I'd be willing to try again. I'm like, great. Because I didn't want her to be so resentful and exhausted at the end of a really successful sales period. I wanted her to go, great, how can we do this again? So that's exactly what happened, which was a big win.

But that was one of the times it just sticks in my mind about how powerful it is to take a look at processes. You know, work expands to fill the time allotted, processes expand, because, you know, once it looked like a good idea, and then it becomes permanently ensconced in your methodology, and truthfully, probably needs to be streamlined, probably needs to be systematized at a whole new level. We have tools, we have technology now that we did not have even a year or two ago. So if your processes are not being made more efficient, they're costing you time and money in terms of human capital. This makes no sense. So revisiting your



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processes regularly is essential. There's some great programs out there. Process Street is one of them. Process Suite is another one. So there's some great tech stuff. I've learned that from my friend Nick Sonnenberg at getleverage.com. But there's also a book about it. In the Traction Library from EOS, they have the book *Process! How Discipline and Consistency Will Set You and Your Business Free*. So if you need any more mindset shifts on process, there's a whole book about that. And then someone else that I've had the pleasure of sharing a stage with occasionally is John LaDuca, and he's a playbook builder, playbookbuilder.com. So that is another way of building out your company's processes, I believe both front and back stage.

So there are some great resources, great people out there who can help you do it. One of the things that I have learned, I can help simplify processes. I'm not great at building them. My attention span doesn't usually last very long. So what I do is I make sure that I work with someone who initiates in Kolbe Follow Through. So there was 7, 8, 9, or 10 in their second number, because they are very, very good at seeing, you know, how to make things consistent. And in my model, these people who make things recur is where profit comes from. I'm changing it all the time. That isn't always profitable. These are the people who are going to actually document things, make sure there's a list, follow the list, that's a radical idea, not change things, and make sure that they are systematic, clear, with a consistent result. This is very important for a business if it's going to do what it says it's going to do. So very, very useful. But you can come in, if you tend to be a little bit more on the disruptive side, and go, hey, ask some good questions. Are there any parts of this process that are frustrating? Anything that's annoying? Anything that's taking feels like forever or too long? Are we letting down our clientele? Because there's a front stage impact to processes too. So anything that connects to your front stage that might be frustrating your clientele, frankly, I would focus on those first, because these are your deliverables to your marketplace. If you can make them easier for your clientele and for your back stage team to deliver on those results faster, easier, cheaper, then do it. Then that makes a ton of sense. That was one of the processes I focused on.

So again, it can be fun to go in and revamp things and make them better and strengthen them, maximize the impact. That's what I like to do. And it doesn't take long, sitting down and delineating what is currently happening, what's working, what's not, what are our improvement ideas? We actually redo the Unique Method and you're done. In probably less than an hour, you can make some major substantial and frankly not hard changes to a process to make it that much better. So you might be surprised that a 2 Follow Through is waxing eloquent about processes, but I have to tell you, it is fun, fun, fun, fun to make them better, to make them easier, to make the people doing them not resist or resent them and to create a better front stage experience especially, as well as a better backstage experience. Just really, really useful. So, not asking you to go back and disrupt everything, but focus on a few key ones where you know that there's gonna be a big win, and I guarantee you it'll be a great, great conversation.



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Thank you so much for listening. Any questions or comments, please let us know at questions@strategicoach.com. And as always, here's to your team's success.