

Your Complete STB Implementor Guide

7- STEP PROCESS HANDBOOK

Everything you need to know
to Systemize The Business



STB

INTRODUCTION

STB Implementor is Systemize The Business's 7 step implementation module for our customers. We take our customers who are business owners that have a real desire to build systems and processes into their company. They want to run a system base business that is not solely reliant on them. After going through the 7 Step Process business owners will have a clear, predictable and measurable way of running each part of their business.

This is what we call the Blueprint or your way of doing business. We take our customers through a 6-12 week process setting up their Core Systems and Core Processes. Below are the 7 steps highlighting what we cover and implement through each step of the process. If you are ready to build systems, figure out your processes and document them. Apply for a free 30min systemization strategy session at

www.SystemTheBusiness.com/contact



STEP ONE - FOUNDATION

Foundation Examination Worksheet
Niche Focus
Crafting Your Message & USP
12 Ideal Market Questions & Analysis
Creating Customer Avatar
Systems & Operation Questionnaire
Product/Service Delivery
Purpose & Vision
Values & Culture
Dream Team

STEP TWO - SYSTEMS

Narrowing Down Your Systems

STEP THREE - DOCUMENTATION

Step by Step Process Creation

STEP FOUR - TECHNOLOGY

Sass & Web Apps

STEP FIVE - INTEGRATION

Development, Implementation, Testing

STEP SIX - TRAINING

System Process Training

STEP SEVEN - BLUEPRINT

Your Way Of Doing Business



STEP ONE - FOUNDATION

1. Determine if your business has core systems in place for systemization
2. Develop missing Core Systems
3. STB's 7 Core Business Components
 1. Core Focus - Niche
 2. Core Market - Marketing
 3. Core Systems - Operations
 4. Core Process - Product or Service Delivery
 5. Core Purpose - Vision
 6. Core Values - Culture
 7. Core Team - Right Person & Right Seat & Right Skills

Result: You will have a business with the essential structure and key functioning components of a company.



STEP TWO - SYSTEMS

1. Decide which systems you want to develop
2. Make a list of systems to systemize
3. Create list of systems to run business, prioritize which 20% of the core processes that will make 80% of the difference and develop these first.
4. Apply the 4/64 rule and begin with these system first

Results: Narrowed down a list of priority core processes to be develop and systems to build.



STEP THREE - DOCUMENTATION

1. Document the Customers Processes and Build Templates.
D.O.C. - (Descriptions Operations Creation)
2. Detailed step by step explanation of all Business Systems.
B.P.P. - (Business Processes and Procedures)
3. Template Creation
T.E.M.P. - (Task | Employee Forms| Manuals | Procedures)
4. Video Tutorials for Repeatable Procedures
V.T.C - (Video Training Creation)

Result: Documented core Business Work Flow & Customer Interaction Flow using automation.



STEP FOUR - TECHNOLOGY

Set Up All in one platform and intergrade any other SaaS/Tools to execute customers Systems

1. Choose All in One Business Management Software (BMS)
2. Install Complementing SaaS App for processes
3. Create Filing System Process (FSP) for business documents
4. Establish File Management System (FMS)

Result: Core systems and core processes fully developed using solution tools. Business documents filling system established.



STEP FIVE - INTEGRATION

1. We input and intergrade all created focuses and processes into the Entrepreneurs Operating Systems or EOS.
2. Test system, work flow and life cycles of EOS.

Result: Core systems and core processes fully developed using solution tools. Test for correct work flow results.



STEP SIX - TRAINING

1. Customers P&S delivery Full Systems Training and Tutorial on All Business System
1. Business Management Software (BMS) Training
2. File Management System (FMS) Training

Result: Fully trained team running systems and executing processes.



STEP SEVEN - BLUEPRINT

1. Create a finalize business manual & procedures.
2. EOS Completed

Result: Have a fully developed & documented Business blueprint for scaling



STEP ONE - FOUNDATION

Foundation Examination Worksheet

In this module you will take a big picture of your business if you are already running one. If you don't this will help you discover missing pieces you will need to develop and think about in your business. Refer back to this survey as you progress to completing the other modules.

STEP 1 - Make a list of departments you currently have in your business





STEP ONE - FOUNDATION

STEP 2 - Make a list of your staff members and their position

STEP 3 - Make a list of Systems you are running in your business





STEP ONE - FOUNDATION

STEP 4 - Make a list of processes you have in your business that have been documented or have written procedures

STEP 5 - Make a list of programs or software you use to run any part of your business? (ie. Sales force, Zoho, Mail Chimp, Aweeber ect.)





STEP ONE - FOUNDATION

Do you feel you have a strong system base foundation in place to run your business today?

What do you feel the business is missing or lacking today?

Are there any missing parts, components or tools in your business that need to be implemented today?



STEP ONE - FOUNDATION

Your Focus and Your Niche

In this module you will be narrowing down your focus and determining your niche. As you go through the process of honing in on one or two products or services. You will also be picking a market segment to target. For those who are just starting a business this module will help you discover your niche and what you will be focusing on to develop your product or service.

IF YOU ALREADY HAVE A BUSINESS WITH A DEFINE PRODUCT OR SERVICE SKIP TO STEP 4.

STEP 1 - Make a list of industries you have been expose to and have some knowledge of its understanding.



STEP ONE - FOUNDATION

Your Focus and Your Niche

STEP 2 - Make a list of things you love doing and passionate about.

STEP 3 - Make a list of skill sets you current have and can do well.



STEP ONE - FOUNDATION

Your Focus and Your Niche

Base on the three list you completed above. What niche product or service can you develop for your new business? What skills can you bring to the market you are already familiar with and have exposure to? Can you see yourself committing to this product or service for at least a year to develop?

After you finish skip down to PMRP Value Index exercise.



STEP ONE - FOUNDATION

Your Focus and Your Niche

STEP 4 - Make a list of all the products and services you sell in order of how much you enjoy providing them.

STEP 5 - Make a list of all the products and services you sell in order of profitability



STEP ONE - FOUNDATION

Your Focus and Your Niche

STEP 6 - Make a list of all the products and services you sell in order of value. Is the marketplace willing to pay and invest.



STEP ONE - FOUNDATION

Your Focus and Your Niche

Do a PMRP Value Index module to figure out your ideal market and niche focus. You will use 4 criteria of each segment market rating of 1-10, 10 being good.

1. PERSONAL SATISFACTION
2. MARKETPLACE BUY IN
3. RETURN ON INVESTMENT(ROI)
4. PRODUCT DELIVERY.

P–Personal Satisfaction: how much do you enjoy dealing/working with this type of customer with this market segment? Is mental and emotional emotions worth it personally?

M–Marketplace Buy In: how much does this market segment value your work? Are they willing to pay you a lot for your work?

R–Return On Investment(ROI): how profitable is the work you do for this market segment? Is the time and resources invested worth the cost to do them?

P–Product Delivery Fulfillment: How proud are you of your work with this market segment? Are you happy with the final product or service after delivering it to your customers?

The highest total rating score is 40.



STEP ONE - FOUNDATION

Your Focus and Your Niche

PRODUCT/SERVICE #1

1. Personal Satisfaction
2. Marketplace Buy In
3. Return On Investment(ROI)
4. Product Delivery

TOTAL SCORE:

PRODUCT/SERVICE #2

1. Personal Satisfaction
2. Marketplace Buy In
3. Return On Investment(ROI)
4. Product Delivery

TOTAL SCORE:

PRODUCT/SERVICE #3

1. Personal Satisfaction
2. Marketplace Buy In
3. Return On Investment(ROI)
4. Product Delivery

TOTAL SCORE:



STEP ONE - FOUNDATION

Your Focus and Your Niche

PRODUCT/SERVICE #4

1. Personal Satisfaction
2. Marketplace Buy In
3. Return On Investment(ROI)
4. Product Delivery

TOTAL SCORE:

PRODUCT/SERVICE #5

1. Personal Satisfaction
2. Marketplace Buy In
3. Return On Investment(ROI)
4. Product Delivery

TOTAL SCORE:

STEP 7 - Decide what your Niche Focus will be. What is your niche and target market? Who is your Ideal customer?



STEP ONE - FOUNDATION

Crafting Your Message & Establishing A Unique Selling Position(USP)

In order to stand out from the crowded marketing place, you need to craft a compelling message that grabs the attention of your target market. Targeting their emotions then they will justify buying with logic. Establish a USP then once you have their attention, the goal of your message is to provoke them to respond. This is what you will accomplish with this module.

STEP 1 - Answer the following questions to discover your **USP** to craft your message.

The entire goal of your **USP** is to answer this question:

Why should I buy from you rather than from your nearest competitor?



STEP ONE - FOUNDATION

Crafting Your Message & Establishing A Unique Selling Position(USP)

So the two questions you must ask yourself and answer are:
Why should they buy?

Why should they buy from me?

Uniqueness can be the product itself, in the way it is packaged,
delivered, supported or even sold. What is the unique advantage you
are offering?



STEP ONE - FOUNDATION

Crafting Your Message & Establishing A Unique Selling Position(USP)

What is your unique selling position(USP)?

STEP 2 - Write and create your compelling message which includes your offer in two ways:

1. Define your message in a simple sentence or two using the "Message Equation". Equation: I help [niche focus] to [get result] [In this Market] by [your offer]

2. You know [problem]? Well, what we do is [solution]. In fact, [proof].



STEP ONE - FOUNDATION

12 Ideal Niche Market Questions Analysis

This module is one of the most important step to learning your niche market and providing the solution they need. Take as much time as you need to do your research and get in the minds of your segment market. For niche market research do the following:

1. Go on amazon and search the top 10 books on your subject matter. Read the comments/reviews
2. Look at the top 10 influencers on your topic (service or product). Read feeds and see what they are saying.
3. Search to see the top 10 blog and read the comments to see what your market is saying(Use buzzsumo.com)
4. Read to see what are the top 10 articles on your niche. Read comments below articles.
5. Use google adwords tool to see what is being search about your niche.

1. What keeps them awake at night, sleepless nights, eyes open, staring at the ceiling pondering?



STEP ONE - FOUNDATION

12 Ideal Niche Market Questions Analysis

2. What are their biggest fears in business and personal life?

3. What makes them angry and who are they angry at?

4. What are 3-5 top daily frustrations?



STEP ONE - FOUNDATION

12 Ideal Niche Market Questions Analysis

5. What trends are occurring and will occur in their businesses or lives?

6. What do they secretly desire most in their lives and business?

7. Is there a built-in bias in the way they make decisions? For example, engineers are exceptionally analytical.



STEP ONE - FOUNDATION

12 Ideal Niche Market Questions Analysis

11. Has anyone in the market been failing at reaching them? How are they doing it?

12. What's taking up most of their time and what's constantly on their mind?



STEP ONE - FOUNDATION

Creating Your Ideal Customer Avatar

In this exercise you will clearly and accurately describe your ideal customer's avatar. By crafting an avatar you will identify the characteristics and qualities they possess. This will force you to visualize, identify and attract the ideal customers you want to work with in your business.

STEP 1 - Answer the following questions about your ideal customers:

Where do they live? How old are they?

What do they do?



STEP ONE - FOUNDATION

Creating Your Ideal Customer Avatar

What is their lifestyle?

What books and magazines do they read?

What is their hobbies?

How does their work week look like?



STEP ONE - FOUNDATION

Creating Your Ideal Customer Avatar

How do they make decisions?

Where do they spend most of their time on?

What challenges do they face on a daily basis in their business?

What are they lacking and need improvement on?



STEP ONE - FOUNDATION

Creating Your Ideal Customer Avatar

How do they make purchasing decision and what gets them to take actions?

What are their hot buttons? What motivates them daily?

****Add anymore characteristic and qualities that will help define your customers avatar.****



STEP ONE - FOUNDATION

Creating Your Ideal Customer Avatar

STEP 2 - Write your customers avatar and write it in a way like a police sketch artist, you piece together a composite that creates a vivid picture of them in your mind.

IDEAL CUSTOMERS AVATAR:



STEP ONE - FOUNDATION

Core Systems and Operations Questionnaire

In this module we will learn what systems you currently have in place and which systems you will need to develop that are critical to running a system base company. Creating systems makes business much simpler to scale, manage and measure. Answer these 5 questions

1. What is your lead capture system? If you don't have one how will you manage new prospects?

2. How are you cultivating your leads? Do you have nurturing system in place? If not how will you cultivate your customer base?



STEP ONE - FOUNDATION

Core Systems and Operations Questionnaire

3. What is your sales conversion strategy system? How are you turning prospects into customers? If you don't have one in place what system do you need to create?

4. Your numbers tell the story, what are your data tracking metrics system? How are you tracking them? What are the top 3 numbers you need to monitor in your business?



STEP ONE - FOUNDATION

Core Systems and Operations Questionnaire

5. What is your business structure? Have you define your business structure hierarchy? How will you run your business? Who is accountable to make sure systems and processes are properly being executed?



STEP ONE - FOUNDATION

Core Process - Product or Service Delivery(P&S)

In this module you will outline and highlight the procedures you will take your customer through when you deliver your P&S. This will give your team clarity in how you as a business will deliver your P&S. This sets the expectation of what you need from the customer and your team. Give each step a Title, a Description and Task you need to do for each step.

Step 1 - Make a list of steps to deliver your product or service. Give each step a name.

Example: Step 1 - Discovery Questionnaire

Step 1 -

Step 2 -

Step 3 -

Step 4 -

Step 5 -

Step 6 -

Step 7 -

Step 8 -

Step 9 -

Step 10 -

Step 11 -

Step 12 -



STEP ONE - FOUNDATION

Core Process - Product or Service Delivery(P&S)

Step 2 - With the list above - Describe each step in 3-5 sentences what the step is, what it accomplishes and how it works. (Title - Description)

Example: Step 1 - Discovery Questionnaire - Customer will be given a 12 questions to answer to understand clients goals, desires and outcomes.

Step 1 -

Step 2 -

Step 3 -

Step 4 -

Step 5 -

Step 6 -



STEP ONE - FOUNDATION

Core Process - Product or Service Delivery(P&S)

Step 7 -

Step 8 -

Step 9 -

Step 10 -

Step 11 -

Step 12 -



STEP ONE - FOUNDATION

Core Process - Product or Service Delivery(P&S)

Step 3 - With the title list and descriptions above - Now make a list or bullet point of task you need to do to complete the step.

Example:

- Create 12 Discovery Questions
- Send Questionnaire to Customer
- Review Questionnaire
- Create questions derived from Questionnaire to clarify clients goals, desires, outcomes.

Step 1 -

Step 2 -



STEP ONE - FOUNDATION

Core Process - Product
or Service Delivery(P&S)

Step 3 -

Step 4 -

Step 5 -

Step 6 -



STEP ONE - FOUNDATION

Core Process - Product or Service Delivery(P&S)

Step 7 -

Step 8 -

Step 9-

Step 10 -



STEP ONE - FOUNDATION

Core Process - Product or Service Delivery(P&S)

Step 11 -

Step 12 -



STEP ONE - FOUNDATION

Core Purpose - Vision

In this module you will answer the following questions to clarify your purpose and vision for your business. This module will help solidify and narrow what you do best. What your company actually does. When your vision is laser focus and well define you will become the King of your hill dominating your niche industry. Every decision you make has to be moving towards your purpose vision. Don't get distracted and fall for the "Shiny Stuff" trap. Stay Focus!

PURPOSE:

1. Why does your organization exist?

2. What is its purpose, cause or passion?



STEP ONE - FOUNDATION

Core Purpose - Vision

3. What is your organization's niche?

4. What is the focus of your organization and its people?



STEP ONE - FOUNDATION

Core Purpose - Vision

VISION:

5. What is your 1 year plan for the organization?

6. What is the 3 year picture of the organization?

7. What is the 10 year target of the organization?



STEP ONE - FOUNDATION

Core Values - Culture

In this module you will go through a process of finding your core values that governs your business. The values you choose should be evident in your team meaning its already being done in your business.

If you don't have a business yet these values are what you will demonstrate to your customer now. Organically will overflow to people you will eventually hire in your business.

You will write down what values you have today and which values you need more of that will create the culture you desire for your company.

Remember people don't work for companies they work with people that share the same values. If you want committed team members who stay with you in the long run you have to create an environment they never want to leave and desire to be part of.

This exercise is done with your team and/or with your managers. Decide together what your core values will be for the company.

IF YOU DON'T HAVE STAFF SKIP TO STEP 3

Step 1 - Make a list of top 1- 5 team members that are valuable in your business that you cannot afford to lose?

1

2

3

4

5



STEP ONE - FOUNDATION

Core Values - Culture

Step 2 - With the list above write down the qualities each staff member possesses that has contributed to the value, culture, attitudes, qualities, characteristics and successes of the organization?

1

2

3

4

5

AFTER COMPLETING SKIP TO STEP 4



STEP ONE - FOUNDATION

Core Values - Culture

Step 3 - If you don't have any staff and its just you currently. Write down the values you want to see in your organization? Write down what kind of culture your want to created as you grow? What qualities do you show your customer that give value to your company? List them below.

- 1
- 2
- 3
- 4
- 5



STEP ONE - FOUNDATION

Core Values - Culture

VALUES:

Step 4 - Decide on 3 - 12 values you want to see in the culture of your organization.
Less is more. Make a list below.

1 Example: Value - Capture The Moment

1

2

3

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STEP ONE - FOUNDATION

Core Values - Culture

VALUES:

Step 5 - From the list above of your organization's values - write down a description for each value in how has this been demonstrated in the company and how this value looks like when it exist in your company's culture.

Example: (Value)- Capture The Moment - (Description) Team member gets a customer complain. Member takes ownership of the moment and creates a lasting impression by listening and offering a solution to satisfy customer. Customer becomes a regular customer even after a their first experience was not to your business standards. (Use real life examples whenever possible.)

1

2

3



STEP ONE - FOUNDATION

Core Values - Culture

VALUES:

4

5

6



STEP ONE - FOUNDATION

Core Values - Culture

VALUES:

7

8

9



STEP ONE - FOUNDATION

Core Team - Right Person & Right Seat & Right Skills

If you want to grow your business, you have to build your dream team. Dream team has in it the right people who hold the right position in the company that match their skillset to excel in role with ease.

The right person on the right seat with the right skills will dominate with their gifting and propel the company to as high as you want it to go. In this challenging module you will figure out who is right person for the company and who is not. And some who is the right person but just needs to hold a different seat because their skill set don't match the demand of the position. Good luck, this is a tough exercise but necessary..

IF YOU DON'T HAVE A TEAM AND ITS JUST YOU CURRENTLY. SKIP TO STEP 5

Step 1 - Make a list of all your team members(staff), the position/title they currently hold and the skills they possess.

1

2

3

4

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STEP ONE - FOUNDATION

Core Team - Right
Person & Right Seat &
Right Skills

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STEP ONE - FOUNDATION

Core Team - Right Person & Right Seat & Right Skills

Step 2 - RIGHT PERSON: From the list above decide whether each person is the right person for the company?

Does each person in your company possess your core values? If they don't, do they have the ability adjust to your core values? Can they be kept accountable to keeping the core value?

1

2

3

4

5



STEP ONE - FOUNDATION

Core Team - Right
Person & Right Seat &
Right Skills

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STEP ONE - FOUNDATION

Core Team - Right Person & Right Seat & Right Skills

Step 3 - RIGHT SEAT: From the list above decide whether each person is on right seat in the position they hold in the company?

Does each person in your company possess the unique abilities to execute the functions of the seat? Do they have it, want it and have the capacity to deliver the demands of the position they hold?

The 3 C's Test - Are they Capable? Do they have the Capacity?
And are they Competent?

1

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STEP ONE - FOUNDATION

Core Team - Right
Person & Right Seat &
Right Skills

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12



STEP ONE - FOUNDATION

Core Team - Right Person & Right Seat & Right Skills

Step 4 - From the list above, write down some team members who need to be move to other seats that fit better with their skill set? Are there team members that need to leave the company because they don't have the values or don't have the capacity to adjust?

Decide and make the hard decisions and be honest. Do what is best for the company moving forward.

1

2

3

4

5



STEP ONE - FOUNDATION

Core Team - Right
Person & Right Seat &
Right Skills

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SKIP TO STEP 6



STEP ONE - FOUNDATION

Core Team - Right Person & Right Seat & Right Skills

Step 5 - Make a list of positions that are critical to have in your company? Develop your dream team. Write down the position title and a description of skills they need for the position.

1

2

3

4

5



STEP ONE - FOUNDATION

Core Team - Right
Person & Right Seat &
Right Skills

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STEP ONE - FOUNDATION

Core Team - Right Person & Right Seat & Right Skills

Step 6 - After creating a list of position and description. Find, Hire or contract your dream team to deliver your product or services. Remember only to hire the top 1% of people who possess your core values(Right People), who can fill the position (Right Seat)and have the ability to deliver the role requires(Right Skills).

1

2

3

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5



STEP ONE - FOUNDATION

Core Team - Right
Person & Right Seat &
Right Skills

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STEP TWO - BUSINESS SYSTEMS

Run A System Base Business

In this module you will narrow down a list of priority core systems to build. Prioritize which 20% of the core processes that will make 80% of the difference in profitability and develop these first. Then apply the 4/64 rule to determine which one to start with.

STEP 1 - Make a list of all the systems you want to develop.



STEP TWO - BUSINESS SYSTEMS

STEP 2 - Decide which systems you want to develop and systemize first, make a list below. Remember the 80/20 rule and the 4/64 rule.

Which systems are you going to start on first?

STEP 3 - Rewrite the list with the order you want to systemize first. Then write down the best way to systemize these systems? What tools and resources do you need?

SYSTEM #1

How I will systemize this process:

The tools I need for this process are:



STEP TWO - BUSINESS SYSTEMS

SYSTEM #2

How I will systemize this process:

The tools I need for this process are:

SYSTEM #3

How I will systemize this process:

The tools I need for this process are:



STEP TWO - BUSINESS SYSTEMS

SYSTEM #4

How I will systemize this process:

The tools I need for this process are:

SYSTEM #5

How I will systemize this process:

The tools I need for this process are:



STEP TWO - BUSINESS SYSTEMS

SYSTEM #6

How I will systemize this process:

The tools I need for this process are:

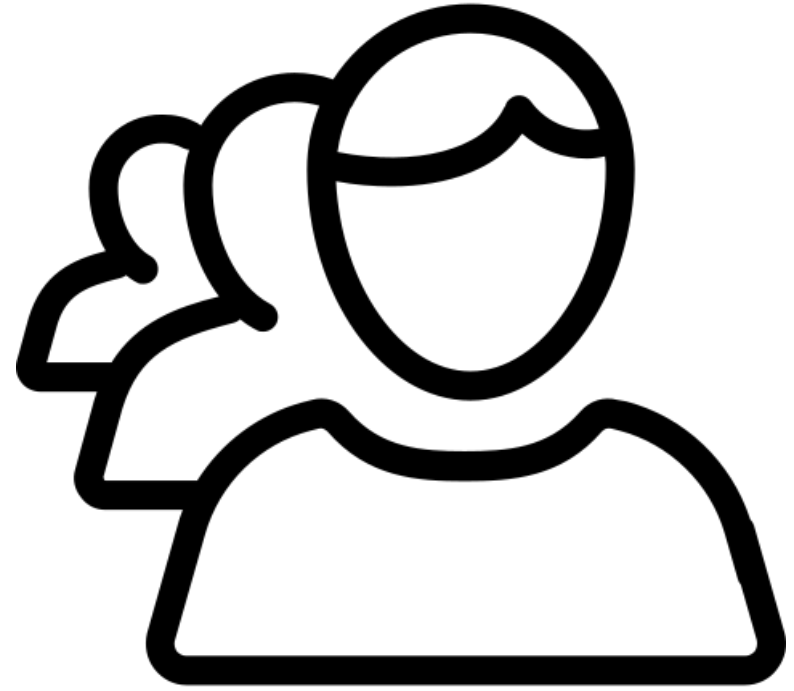


STEP THREE - DOCUMENTATION

DOCUMENT YOUR CORE PROCESS

In this module you will document every core Business Work Flow process & Customer Interaction Flow process. Write every step of the process, use a checklist when appropriate, picture illustrations and record a video when necessary.

- Document the Customer's Processes and Build Templates.
- Start with one system and create its process one at a time.
- Remember to D.O.C. (Descriptions | Operations | Creations)
D.O.C each system of your business.
- Create a detailed but concise step by step explanation of all Business Processes and Procedures (BPP)
- Template Creation - T.E.M.P. - Task | Employee Forms| Manuals | Procedures
- Created Video Training Creation (VTC) for Repeatable Procedures





STEP THREE DOCUMENTATION

SYSTEM # - Name

Write the process:

STEP 1 - Name the step

Explain how the step is done in 1-3 sentences

Explain how the step is done in 1-3 sentences

STEP 2 - Name the step

Explain how the step is done in 1-3 sentences



STEP THREE DOCUMENTATION

Write the process:

STEP 3 - Name the step

Explain how the step is done in 1-3 sentences

STEP 4 - Name the step

Explain how the step is done in 1-3 sentences

STEP 5 - Name the step

Explain how the step is done in 1-3 sentences



STEP THREE DOCUMENTATION

Write the process:

STEP 6 - Name the step

Explain how the step is done in 1-3 sentences

STEP 7 - Name the step

Explain how the step is done in 1-3 sentences

STEP 8 - Name the step

Explain how the step is done in 1-3 sentences



STEP THREE DOCUMENTATION

Write the process:

STEP 9 - Name the step

Explain how the step is done in 1-3 sentences

STEP 10 - Name the step

Explain how the step is done in 1-3 sentences



STEP THREE DOCUMENTATION

Write the process:

STEP 11 - Name the step

Explain how the step is done in 1-3 sentences

STEP 12 - Name the step

Explain how the step is done in 1-3 sentences



STEP THREE DOCUMENTATION

Write the process:

STEP 13 - Name the step

Explain how the step is done in 1-3 sentences

STEP 14 - Name the step

Explain how the step is done in 1-3 sentences

STEP 15 - Name the step

Explain how the step is done in 1-3 sentences



STEP THREE DOCUMENTATION

After documenting all the steps decide if you need to record a video tutorial for the system.

- The documentation you just created is the script you will need to create the VTC. Follow the steps allow the documentation to be capture in video form.
- Keep videos simple.

VTC FORMAT:

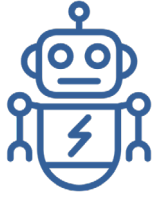
Step 1 - State the Process Name/Title

Step 2 - Read the 1-3 description you wrote out on your documentation.

Step 3 - In your own word explain the steps as you would if you were training a new hire.

- Using word and language you normally use.
- Do not try to sound professional but be yourself.

Step 4 - Incorporate any image or illustration for the VTC that will help visualize system.



STEP FOUR - TECHNOLOGY

Use Tech To Scale Your Business

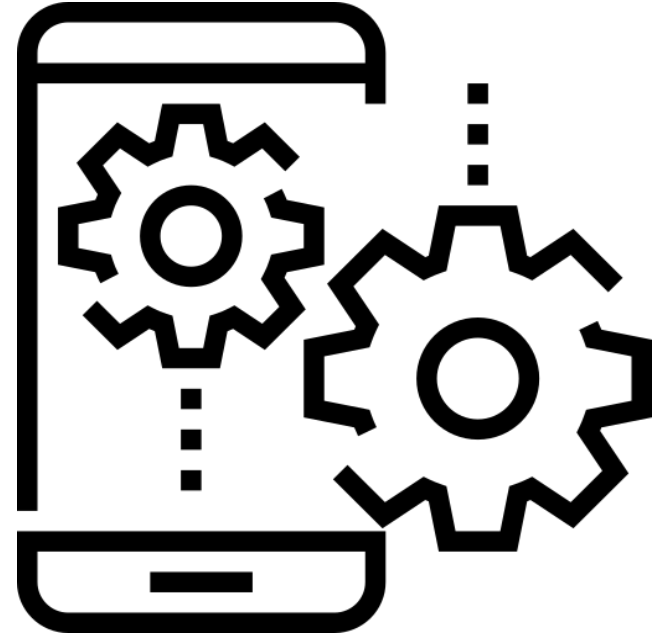
In this module you will decide which technology apps will be used to run your systems and execute your processes. Once you have them chosen, you will sign up for free or paid accounts then start building your system processes with the apps.

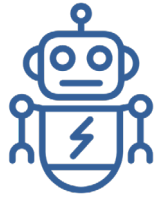
Sign up for an All in one platform CRM(Client Management Relationship) and setup/signup for any other SAAS(Software As A Service)Tools to execute systems.

SOME APPS TO CONSIDER:

1. All in One Business Management Software (BMS)
2. Install any other complementing SaaS Apps (Mail Services, Funnels, Retargeting, Billing, G-Suite) etc.)
3. File Management System (FMS) (G-Suite)
4. Create Filing System Process (FSP) for business documents(G-Suite)

Result: Core systems and Core processes fully developed using solution tech tools.



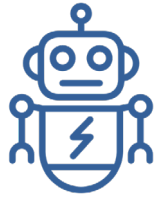


STEP FOUR - TECHNOLOGY

STEP 1 - Make a decision to which CRM platform you will use to store customers contact information? This is the base where all your SAAS will integrate and execute your system processes.

CRM -

STEP 2 - Which other Web Applications(SAAS) do you need to run your systems and execute your processes?



STEP FOUR - TECHNOLOGY

STEP 3 - What is the cost per year to run all technology applications?

STEP 4 - Are these web apps technology necessary to have today to run the business? Yes or no & why?

STEP 5 - Make a list of all the systems and which web apps will be use to execute its processes?

Once you have decided what technology apps you need, start with setting up your CRM first and migrate all your contact to the CRM. Then work on setting up each other SAAS app one at a time. Then test and retest.



STEP FIVE - INTEGRATION

Development, Implementing, & Test Systems

In this module we input and intergrade all created systems and processes into the Entrepreneurs Operating Systems or EOS. Your EOS will be the machine where your business will run on. Base on all you have done in Steps 1-4 this is where we put everything together to run like an well oiled machine.

The results we are after is that your Core Systems and Core Processes are fully implement using the SAAS tools you have chosen. We will test all systems, work flows and life cycles of EOS after we input and intergrade all the components.

STEP 1 - Start with one system and begin to develop and implement its processes using the technology (SAAS) web app you have chosen. If a system you have doesn't need technology then skip to the next one.

STEP 2 - After Developing and implementing the system using web apps, test to make sure the correct outcome/outputs are accurate.

STEP 3 - Iterate and make changes/tweaks needed to adapt to the correct outputs and results of that system.

STEP 4 - Repeat steps 1-3 until all systems have been developed, implemented and tested for accuracy.



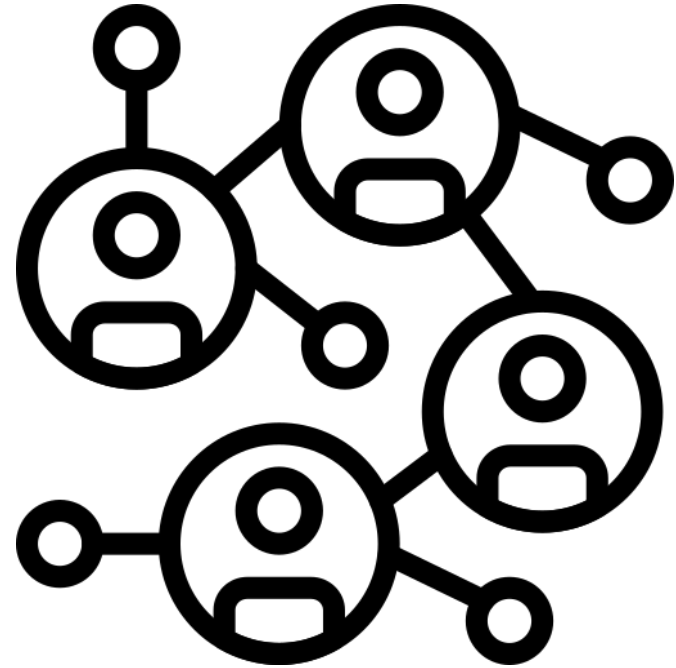
STEP SIX - TRAINING

Getting The Team On the Same Page

Once step 5 is completed then next step is to start training your team on all the new business systems and processes. You will use the documentation you created for each system and its processes to train. Use any VTC you have created for training, complementing them with the step by step documentation. This includes but not limited to all the tools and technology you have developed and implemented.

Result: What We want is to have a fully trained Dream Team using technology, running the systems and executing the processes according to the documentation. Train managers first if your team has a management structure in place then team member they oversee.

STEP 1 - Make a list of all the systems you have in your EOS prioritizing the most important system to train first. Place them in order of importance.





STEP SIX - TRAINING

STEP 2 - From the list above write which staff member needs to be trained for each system.

STEP 2 - Assign one person or manager to track progress and who will be accountable for running the system correctly and make sure processes are being executed according to the documentation.



STEP SEVEN - BLUEPRINT

Entrepreneurs Operating System

The final step is putting together the finish Business Blueprint but ever changing blueprint of systems, procedures, manual, templates & processes.

This is what makes up your EOS in how you run each part of your business. Remember to iterate base on the market changes and validated learning from your customers feedback about your product and service delivery.

The end result is that you now have a fully developed & documented system processes that is in your Business Blueprint(BB) to grow and operate your business.

STEP 1 - Gather all the documentation you have developed and written out. Strategically place them in an order first by grouping them into categories. List categories below.



STEP SEVEN - BLUEPRINT

STEP 2 - Print all pages, place them in order by category or using Word, Pages or PDFs combine them digitally.

STEP 3 - Create a cover page and table of contents for the EOS.

STEP 4 - Go through your EOS Blueprint and decide if the order is correct and if there are parts that need to be added or omitted from your EOS. Do so accordingly.

STEP 5 - Create a physical EOS for your team to access and a digital version for your business.

STEP 6 - Give a copy to all managers and schedule a meeting to go over the new EOS.

STEP 7 - Get feedback about new EOS and make iteration based on feedback that you see fit to change.

STEP 8 - Finalize EOS and be open to changes. As you grow your EOS needs to change with growth. New challenges occur during times of growth, adjust how you run your systems and processes when you grow as a company.