



Systematize Business & Workroom Functions

Join us for [live webinars](#) on June 30 & July 2, 2020 for a more in-depth discussion on the information in this guide.

Take time to read this guide on the topics below, and prepare questions to be answered during the webinar:

- Create business processes to keep the workflow organized and on track
- Automate processes to save time
- Shift focus to growing the business vs. managing the business

The three main areas of business



The Business Owner or Entrepreneur

The business owner or entrepreneur is an innovator and visionary. The business owner is responsible for the growth, stability, and direction of the daily operation of the business. A business owner thinks in the future to create and reach goals to move the business forward.



The Manager

The manager helps to create order in the business. The manager is responsible for planning, directing, and overseeing the operations of the business and for overseeing and the flow of projects from start to finish.



The Technician

The technician creates and gets the work done. The technician considers how to do the work and sets about to get it done.

Creating processes will help you keep on track and the workflow organized. These processes also help create job descriptions for members of your organization and allows the business to run smoothly by defining each person's responsibility. If you are a one-person business, you wear many hats. Understanding how to time block may help you organize the many tasks so that you are working efficiently and allow the business to run smoothly.

Once you understand the different phases and roles of your business you can create processes for each. Listed below are some examples of a few responsibilities for the three main areas of business shown above.

The Business Owner or Entrepreneur

1. Vision Statement

A vision statement describes the desired future position of the company. Consider what you are building. Write your vision statement here:

2. Mission Statement

A mission statement defines the company's business, objectives, and approach to reach those. A mission statement is timeless, unlike a goal that has an ending date. Write your mission statement here:

3. Objectives

Having a list of business objectives create guidelines that become the foundation of your business planning. Objectives may be measured. Think of things such as getting and staying profitable, productivity, excellent customer service, or sustainable growth. List 5 objectives for your business here:

- 1.
- 2.
- 3.
- 4.
- 5.

4. Strategies

Strategies are what will make the business successful over time. Consider all the decisions taken to accomplish the business goals. List 5 strategies for your business here:

- 1.
- 2.
- 3.
- 4.
- 5.

5. Plans

The plans list how the business will get from where it is now to where you plan for it to be in the future. List the plans here:

The Manager

1. Design spreadsheets for workflow management

These may list items sold for individual projects with columns for product name/color, manufacturer, date ordered, date arrived, etc. Make a list of items you keep track of for a project you are working on now.

2. Create systems and processes

One example is a process for projects from the initial contact with the client to the end of the installation. List all steps from start to finish. When writing a process, list the employees or team members used for the projects and how they fit in the process. Consider a typical project your company works on. List the steps you take from the beginning to the end and create a written process.

3. Oversee or manage the team members

A manager is responsible for those carrying out the work to create the project. As an example, a manager may contact a drapery workroom throughout the project and check if the fabric has arrived, or if fabrication is on schedule. With a shared spreadsheet, each team member may complete information on a spreadsheet so that everyone is up to date as the project progresses. List 3 ways you communicate with team members within your organization to keep the work flowing smoothly and on time.

1.

2.

3.

The Technician

1. Create systems and processes

These systems and processes will differ from those of the manager. In a drapery workroom, these may include steps for organizing the workflow for each project in the workroom or steps for making products for the projects. Systemizing how things are made eliminates confusion and/or mistakes. Use the space below to list the workflow process you use in a typical project in your business.

2. Create a workroom or business manual

Include in these working samples of items fabricated in the workroom along with step by step directions. A business manual may include letters to customers to inform them of your systems and processes or letters or communication on what to expect during a consultation appointment or installation or delivery of furniture. Use the space below to write 3 ideas you can put into a manual for your business.

1.

2.

3.

3. Use creativity and innovation

Streamline the processes used in creating a product. Consider ways to create a product more efficiently that will allow you to save time. List 3 things you create and how to work more efficiently as you make these.

1.

2.

3.

Writing your business systems and processes can be a time-consuming process. Do not let this stop you. Work at it a little bit at a time. Create a good filing system within your computer to store the processes. Remember once you have them, they are there forever. Update them from time to time as your business grows and changes.

When you shift your mindset to growing the business from simply managing the business, new doors will open, and your business will reap the benefits.