

# *The* **My Online Biz** **Tool Kit**



**The 50-piece toolkit to start, scale and  
sustain your online business!**

## **Tool #4 - How To Create Step-By-Step Systems (To Make Things Easier)**

No matter what type of business you're running, one thing is for certain: you can benefit from creating systems, especially for your largest or most complex tasks.

- ⇒ One benefit of creating systems is that you can refine your strategy in a way so that you get consistent results.
- ⇒ Another benefit is that you'll be able to complete these tasks or processes much more quickly as you'll be using a streamlined system.
- ⇒ Still another benefit is that you can hand your system over to someone else, and they'll be able to create good results too.

So, with all these benefits in mind, let's have a look at how to create systems...

### **Step 1: Decide Which Processes Need Systems**

The first step is to figure out which tasks would benefit from you creating a system. These tend to be large and / or complex tasks that you do regularly (*daily, weekly, monthly, quarterly or annually*).

For example:

- ⇒ Hiring a freelancer.
- ⇒ Managing a mailing list.
- ⇒ Setting up and managing a Facebook ad campaign.
- ⇒ Creating a large infoproduct.
- ⇒ Bookkeeping and paying taxes.
- ⇒ Developing a sales funnel.

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⇒ Finding and approaching potential joint venture partners.

And similar.

Go ahead and take a moment to brainstorm all the tasks you do daily, weekly, monthly, quarterly and yearly.

Next, select the tasks around which you want to create a system.

These are...

⇒ Tasks that are big or complex which take some time to complete.

⇒ Tasks you'd like to speed up or get better results from.

⇒ Tasks you'd like to hand off to others to complete for you.

Pick one to start with and then move to the next step...

### Step 2: Detail the Steps

What you need to do next is write down all the steps of the process, along with any notes, checklists, ideas, templates and so on that are useful to completing the process.

Here you'll complete two steps in this order:

**1.** Start by brainstorming everything you know about completing the process. At this point, don't judge your process – just write down the way you're currently doing the process.

**Note:** If you haven't yet done the task so that you don't have your own process for doing it, then go right to step 2 and research how others do it.

**2.** Research the process to uncover additional or better ways to complete the task. You can then refine the steps you drafted previously as needed to create a better process.

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For example, you can go to Google and run a variety of searches such as:

- ⇒ Best way to [complete a process]
- ⇒ Tips and tricks for [completing a process]
- ⇒ [Process] system

As you do your research, be sure to stick to reputable sources of information such as sources from well-known experts, academic journals, and similar.

Once you've researched the process and refined your way of doing it to the best of your ability, then move on to the next step...

### **Step 3: Discuss Your System With Others**

The next step is to talk to people who are experts at this process and ask them to help refine your process. If you have a friend, you may be able to get this help for free. In other cases, you may hire someone to coach you through the process.

For example, if you were developing a system for planning a new website, you might talk to your colleagues who do this on a regular basis, and / or you might hire a freelance web developer for an hour or so to learn more about how they plan and develop websites. Still another idea is to go to relevant groups – in this case, a web developers' forum – to get feedback on your system.

Take the good feedback, apply it to your system, and then move on to the next step...

### **Step 4: Develop Your System**

At this point, you've got a system that looks good on paper. Now you need to actually use the system so that you can further develop it and refine it. You can use it yourself and give it to others on your team (*and even outside your team*) to use. Be sure anyone who uses it follows the steps EXACTLY so that you can determine how well it works.

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Once you and others have used it, then refine the system one last time as needed based on what you learned when you took it for a real-world test drive.

And finally...

### **Step 5: Document Your System**

Not only do you want to be sure you follow the exact system each time, you also want to be able to hand your system off to others to use. As such, your final step is to document the system.

You'll want to create a written system that lists each step clearly and explains each step in detail. Be sure to include any notes, tips, ideas, checklists, examples, mistakes to avoid and more to complete the system. You can also include useful graphics, photos, illustrations, screenshots or even videos.

For example, if you were creating a system about how to set up a Facebook™ ad campaign, then you might include a set of ad templates, as well as relevant screenshots for setting up the campaign.

Once you've documented your system, then you can distribute it according to the recipient's preferred method.

For example, some people prefer to have the system on their computer, while others prefer a printed copy. Still others may prefer access to both versions.

Note that the distribution method also depends on the system. For example, if your system includes links to a series of demo videos, then obviously, it's going to make more sense to distribute the system digitally (*as then people can click on the links to watch the videos*). For other systems – such as a tax / bookkeeping system – a paper copy is fine for those who want it.

### **Conclusion**

You just discovered a simple five-step process for developing your own systems and refined processes for some of your common work tasks. Go ahead and put this

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tutorial to work today – because the sooner you do, the sooner you'll start saving time and enjoying consistent results.