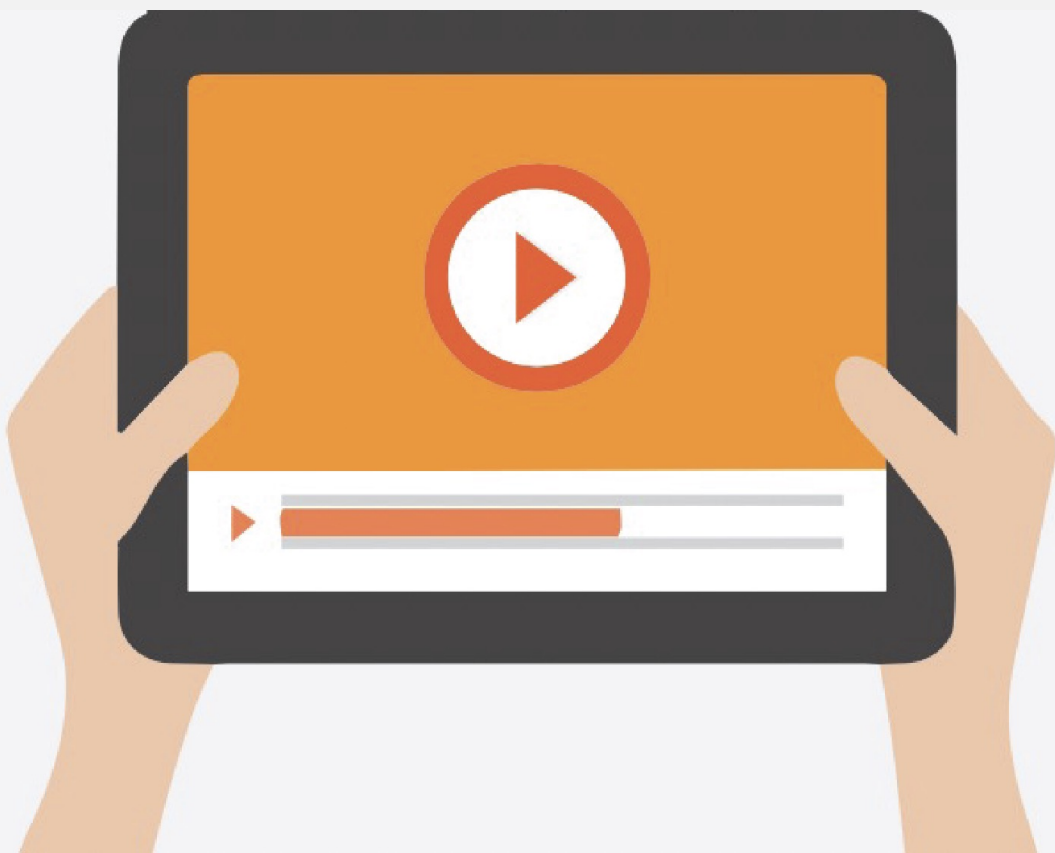


Playbook Your Business

Getting Started



playbook
BUILDER™



Getting Started Guide

You are charged up. You are ready to tackle the processes in your organization once and for all. It's time. You're motivated. The team is motivated. But...where in the heck do we start? Which one goes first? I've had this conversation hundreds of times with Integrators and Visionary types alike. The promise of systemizing the business is compelling. But setting a priority is hard.

Let me walk you through my process for how to prioritize process:

First, list out a dozen Core Processes you need to address. Don't include more than twelve.

Second, score each Core Process listed with a check mark based on the following criteria:

- **Urgency?** Is there some sort of an issue here that's urgent and needs to be addressed?
- **Big ROI?** Will you see a big gain by tackling this one? Are you likely to see a huge return on your investment of time and energy?
- **Process Perfected?** Some processes are in flux because of a software change-over or a new product or service offering. You might have a big dispute about how a process should be run. You might be in the middle of a merger.
- **Leadership Wants It?** Pick the pet project your leadership team cares about, to make sure you have the resources and support you need to drive adoption.
- **Process is Mapped?** Do you have the process already laid out? Do you have it mapped yet? If you find yourself in a tie between two equally valuable Core Processes to tackle, pick the one that's already mapped.
- **Subject Matter Experts (SMEs) Identified?** If you know your WHO for this process, you get a check because it's really half the battle and critical criteria for deciding where to start.

OK so now you need to add up the check marks. Which ones got the highest scores?

Grab up your top three and rank them in order of priority.



Core Process Priority Tool

Directions

- 1 Define 12 **Core Processes** in your organization
- 2 Score each **Core Process** against the priority criteria
- 3 Score your grid and select the **top 3** that will have the most impact
- 4 Rank the top three into an order of priority

Top 12 Core Processes		Urgent Issues	Big ROI	Process Perfected	Leadership Wants It	Process Is Mapped	SMEs Identified
Examples							
Sales							
Marketing							
Team Onboarding							
Client Onboarding							
Customer Service							
Supply Chain							
Human Resources							
Accounting							
M&A							
Administration							
Event Management							
Assembly							
Technology							
Manufacturing							
Procurement							
Processing							

Top 3 Core Processes

Order of Priority →



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The Initiative	PBB Can Help	The Result
Increasing company revenues	Capture best practices of your best salespeople and teach others through online training	Everyone can emulate and produce at a higher level more consistently
Onboarding	Create an onboarding playbook that outlines everything from company history & values to benefits package (see PBB template)	New people can have a consistent self-directed onboarding experience to supplement your other efforts
Mergers & Acquisitions	Create a playbook for onboarding into the new organization and key processes	You can accelerate the M&A process, drive consistency, and save time and frustration
Operations	Capture the best practices of your SMEs and create a "Followed By All" culture	All team members are facing the same direction and know the most important information about your company and how it best functions
Losing Experienced Team Members	Capture the institutional knowledge of these key personnel by documenting their most valuable experiences, stories, advice, and guidance prior to their departure	Every team member has access to a bank of knowledge that belongs to your company and will never be lost
The Initiative	PBB Can Help	Result
Training Independent Agents or Reps	Develop playbooks to scale your training and offer an on-demand solution for answers, coaching, and resources	New agents or reps have access to training from those who have been successful within the role, wherever and whenever they need it
Selling A Program	Productize your knowledge as a program and make it accessible to your current customers, new customers, and even license to your competitors	Your company enjoys a recurring revenue stream and your team's knowledge provides value for others without requiring your time
Selling Your Business	Capture your best practices, processes, stories, and advice within your PlaybookBuilder account	Your organization benefits from your systematized knowledge and becomes much more turn-key, which is valued at a higher multiple
Passive Value For Clients	Use PBB to create resources and coaching, curate content, tools, and resources to bind your customers to you and your brand	Your clients feel supported at all times and recognize your value even when they don't meet with you, while protecting your time and that of your team
Franchise Or Sale	Operationalize your enterprise with playbooks that cover every area of the business	Ensure total team alignment regardless of geography, size, or pace of growth



PlaybookBuilder is a cloud-based knowledge management platform that houses all the processes, tools, training, and best practices of an organization, so it can move fast but keep everyone connected and updated. www.playbookbuilder.com

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