

Playbook Your Business

Getting Started



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Getting Started Guide

You're energized and motivated to tackle the processes within your organization, but figuring out where to start can be daunting. Prioritizing which process to tackle first is a common struggle for both Integrators and Visionary types, even though the benefits of systemizing the business are compelling.

To help with this challenge, here is a process for prioritizing your processes:

1. Begin by listing out a maximum of **twelve Core Processes** that need to be addressed.
2. Assign a check mark score to **each Core Process** based on the following criteria:
 - **Urgency:** Is there an urgent issue that needs to be addressed?
 - **Big ROI:** Will there be a significant return on investment of time and energy?
 - **Process Perfected:** Are there changes due to software, new products, or services that make the process more challenging?
 - **Leadership Support:** Does the leadership team support this project?
 - **Process is Mapped:** Has the process already been mapped out?
 - **Subject Matter Experts (SMEs) Identified:** Do you know who to involve in this process?
3. Add up the check marks for **each Core Process** to determine which ones have the highest scores.
4. Select the **top three Core Processes** with the highest scores and rank them in order of priority.

By following this process, you can prioritize your Core Processes and tackle them in a more organized and efficient manner.



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

Scorecard Number to Measure It

Order of Priority



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