

## Simple Steps for Documenting Systems to Scale Your Cleaning Company

As a business owner, you understand the need for creating systems for the different moving parts of your business. But most companies struggle to make the time to document repeatable systems in their business.

Many business owners fall into the trap of not wanting to take the time to train someone else how to do a task that they do. The common excuse is that "it's faster to just do it myself". But when you multiply many, many tasks that you should be delegating, it is certainly NOT faster to do it yourself!

If you are lacking in documented systems, then keep reading. It's time to carve out the time to get started. Even if you can only devote one or two hours a week, it's better than doing nothing. You'll be making progress.

### ***What exactly does it mean to create a system?***

*Basically it means writing down step-by-step procedures for a specific part of your business.*

## Examples of Systems to Create

What kind of systems should you create for your business? We'll cover the different categories of systems later in this article, but a set of Financial systems might include:

- How to invoice a customer
- How to deposit checks
- How to pay an invoice
- How to reconcile bank accounts

## Example: Creating a System for Converting Phone Prospects

Besides financial systems, you'll want to create systems for other routine tasks in your business.

Having a system for converting prospects interested in your cleaning service is a high priority system to create for your business. After all, you won't have much need for financial systems if you don't have a proven way to convert prospects! And we've seen too many cleaning companies "wing it" when it comes to phone calls and email inquiries – especially when it comes time to delegate this to your employees. If your employees aren't trained on how to convert prospects you will quickly lose business to your competitors.

Your phone system for converting prospects should include some sort of script that gathers all the information you need to quote an accurate price. It should also include verbiage to use when the prospect presents you or your employee with an objection. If you can't overcome objections or show them the value of doing business with you from the start of the call, then your close rate will be low.

You're too busy to handle the phones by yourself so it's time to assign this task to an employee. But if you don't have the specific process documented, chances are, the employee will make mistakes and you'll find inconsistencies in the way she talks with each client. You want your employee to maintain control of the call so you get the information you need and improve the chance to convert.

What happens in most cases where the process isn't documented is, the owner sits down with the employee and shows the employee how to do the process and have her observe how you handle the phone calls.

Next you have her take the next several calls. You give her some coaching after each call and let her continue answering the phone. But when you check in on her the next day, you see she's not following the process you outlined for her, so you do a little more coaching.

Then, a couple weeks later, you realized that phone conversions have dropped off (and remember, that tracking conversions is also a process you must document). So you once again observe her process and find that she's slipped into old habits so you do some more coaching.

Eventually she gets the process down and things run smoothly – for a while. What happens when that employee is sick, goes on maternity leave, or quits and you don't have the procedures written down?

Most likely the job is going to fall right back to you until you can hire a replacement. And this is typically how it goes in business until you spend the time to write these procedures down.

This is what we call systematizing your business, and it's crucial if you want to scale your company. Some people also refer to this as creating Standard Operating Procedures for your business. So I'd like to share with you a "system" for writing your own Standard Operating Procedure.

## **How to Write a Standard Operating Procedure (System)**

### **Step 1: What are You Trying to Accomplish?**

The first step is to write down what you are trying to accomplish with this procedure. If the procedure is how to enter payments into your bookkeeping program, the goal might be to set up a system to enter all payments twice a month.

### **Step 2: Write Down the Procedure, Step-by-Step**

The next step is to write down the procedure, step-by-step in a clear and concise way. Be sure to give enough detail that the employee performing the task can do it correctly. I always found it most helpful to write it down as I was doing the task. Don't rely on writing the procedures from memory, as you're sure to forget something.

After you've written it down, test the procedure yourself. Follow your own instructions to make sure you didn't miss anything, and to make sure it's all in the proper order. Adjust the procedure as needed and keep testing until you're sure it's correct.

### **Step 3: Have an Employee Follow the Procedure**

Next, have an employee follow the procedures you've written to see if they can complete the task by following your procedures. Ask for feedback on anything that was not clear, hard to understand, or missing. After making more adjustments, write the final version of the system.

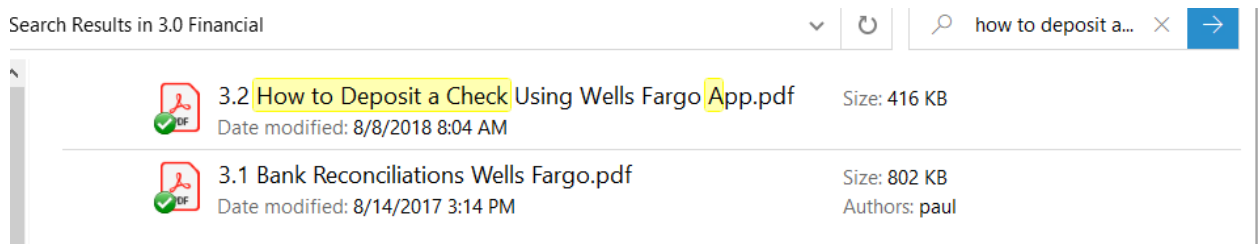
## **Important Tips for Documenting Systems**

- Be sure to keep all written, Standard Operating Procedures organized in a folder on your computer. We recommend using a service like Dropbox that is shareable with your team so everyone that needs it has online access.
- When you use a service like Dropbox, you can use the Search feature to find the procedures you're looking for. Be sure to name your systems using the same words

you'd use to search for a document. For example: How to Reconcile Bank Statements. If you were to search for "how to reconcile bank statements", or simply "bank statements", your system will show up in the search results.

Here is an example of searching for "how to deposit a check". The search was done in the Financial folder and there were 2 results. The first one is the one I was looking for. Notice how we used keywords "how to deposit a check" in the title of the document.

We also used the bank name in the title in case we wanted to search for all procedures related to our bank.



- If a procedure is one that is done on the computer, the process can be recorded using a screen recording app like SnagIt or Camtasia. Simply record the procedure as you do it, narrating what you're doing, step-by-step. This is a quick way for you to document a procedure that you need to delegate. Then let the employee learn the process from the video and from there document the step-by-step procedure in written format.
- A tool we recommend that makes documenting procedures easy is Process Street. You can find it online at Process.st. This tool enables you to create bulleted lists and add images such as screen shots like the one above. Images with arrows pointing to fields to fill out and buttons to clean make it simple for the employee to follow along.
- Keep your systems organized in folders. We recommend making 5 primary folders called:
  - Sales & Marketing
  - Operations
  - Financial
  - HR
  - Leadership

- Once you've written a Standard Operating Procedure, don't file it away thinking, "Good. I've done it. I never have to do that again." Because, as you know, things change; software changes, equipment changes... so sometimes procedures need to be updated. The last thing you want to do is train a new employee with old procedures.

## **Have Your Employees Document Systems For You**

It's important to note that you don't have to be the one to document every procedure!

You have employees that already perform many procedural duties. So teach your employees how to update or create the procedure themselves. They are the ones performing the job, so they should be involved in creating and updating the systems. And you may be surprised at how happy it makes THEM to be given that added responsibility for your company.

## **Types of Systems to Document**

As mentioned previously, there are five different categories of documentation:

1. Sales & Marketing
2. Operations
3. Financial
4. HR
5. Leadership

## **Examples of procedures to document within each category**

This is just a small sample of systems and procedures that should be documented. It will take time to document everything so start with the most important systems and work on it over time.

### **Sales & Marketing**

- How to create and send a customer newsletter

- How to post on social media sites (including how to set up editors for access to the accounts)
- How to log into your website host, registrar and website.
- How to perform various functions such as adding a new email address, how to renew your domain name and how to make simple updates to your website.
- How to add and edit prospect information in your CRM
- Phone answering procedures
- Conversion procedures for returning phone calls
- Process for replying to email inquiries for your services

### **Operations**

- Onboarding new clients
- Client Communication Plan
- Timekeeping procedures
- Quality Control procedures for supervisors and managers
- Customer Satisfaction Survey procedures
- Procedures for handling customer requests, complaints
- Procedures for ordering cleaning or office supplies
- Procedures for reporting equipment failure
- Procedures for cleaning and storing equipment and supplies in your office or in company vehicles
- Procedure for what to do in case of an injury accident

### **Financial**

- Procedures for paying employment taxes
- Procedures for paying quarterly taxes
- How to deposit customer checks
- Procedures for paying invoices on time
- How to enter payments into bookkeeping program
- How to balance checking and savings accounts
- How to run monthly financial reports

- How to enter budgets

### **Team/HR**

- Payroll procedures
- Hiring procedures
  - Job Descriptions
  - Writing ads
  - Posting ads
  - Phone interview procedures
  - In-person interview procedures
  - Procedure for making a job offer
- Onboarding procedures
- Training schedule and procedures
- Performance Review process
- Discipline (oral, written incidents, witnesses)
- Terminating employees

### **Leadership**

- Organizational Charts – plan for growth
- Process for promoting employees into supervisory positions
- Supervisor Training procedures
- Operations Manager Training procedures
- Supervisor/Management Meeting Agenda – how to lead a productive meeting
- How to review financial reports and budgets
- Compensation review process
- SOP (Standard Operating Procedures) training for creating systems

## Here is Why You Need to Get Started Today!

Cleaning companies that want to scale their business must continually work on documenting the systems within their business. When you have documented systems and procedures:

- As the owner, **you will have more freedom** to work on the "A Level" activities you are meant to be doing.
- **Your team will become more productive** because they are using consistent processes that are efficient. And increased productivity directly impacts profit because you won't be paying employees for time wasted on asking questions or doing things in an inefficient manner.
- **Training will be consistent** so there will be fewer mistakes and claims that "no one ever told me I had to do that"!
- **When it comes time to sell your business, it will be worth more.** Buyers want to buy companies that don't rely on the owner or the memories of employees that may be gone tomorrow. The more up-to-date documented systems you have, the more attractive your business will be to potential buyers.
- Companies that document systems are more organized and in general, have **happier employees**. Happy employees mean a positive culture and a great place to work.
- **You'll be able to grow faster**, which means more profit in your pocket.

## Need Help Developing Systems and Controls for Your Business?

Steve Hanson, Co-founder of MyHouseCleaningBiz.com, will help you develop your cleaning business to be systems reliant, not owner reliant. You will do this with the 5 core business pillars - sales/marketing, operations, finance, team and leadership. Steve will coach you to develop your Master Business System with each of those 5 pillars.

[Learn More Here](#)