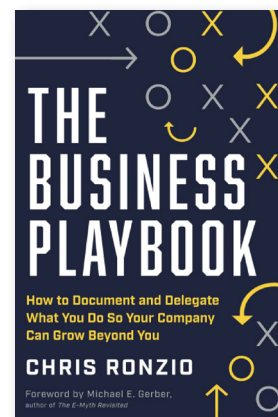


The Business Playbook

How to Document and Delegate What You Do
So Your Company Can Grow Beyond You

by **Chris Ronzio**



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THE SUMMARY IN BRIEF

You've probably learned the hard way that when you're the only one who knows what you know about the business, you can't get other people up and running quickly. Every owner wants the same thing: an efficient workflow that makes sense to everyone in the company. They and you, no doubt want to be able to trust the operation of their business to someone else. All of that knowledge is so much a part of you that you take it for granted--right up until the time the roof falls in because you can't be reached. Having a playbook that includes everything that makes your business your business allows it to exist beyond you.

No matter who ultimately takes on that day-to-day, building a playbook gets you thinking about how to successfully onboard your people so they understand what they need to know and when they need to know it. At the same time, you'll be shaping a culture that values process and efficiency, as well as gaining in all the other ways you'll learn about. ***The Business Playbook*** is a guide for the what, who, how, when, and why of building your company's playbook and making it stick.

IN THIS SUMMARY, YOU WILL LEARN:

- How to document your business in a way that leads to repeatable, effective processes.
- How to create a playbook that will serve as the ultimate guide for future success.
- Create sustainable business practices that will grow alongside your organization.

The Four Elements of a Playbook

Like the periodic table, the elements of a playbook are universal. Unlike the periodic table's 118 elements, a playbook has only four (each starting with the letter "P" for playbook). The first element is your **Profile**. Similar to a profile on social media, the company profile on your playbook is how you introduce what your business is about. It includes your brand, culture, values, mission, vision, and history. The profile section also explains to new hires or potential investors/acquirers why you exist, who you serve, basically how you serve them, and how you differ from other businesses in the same category.

The second element is the **People** who work in the business—a matter of intense curiosity for new hires. They're already looking everyone up on LinkedIn to get a feel for who they'll interact with; they'll appreciate it if you put everything in one place for them. This element helps everyone understand who's who, and who does what in your company.

Third is your company's **Policies** — the operating rules and standards that would typically go into an employee handbook. They include everything from office-access hours, dress code, and vacation time to legal compliance: state and federal regulations, and anti-harassment and safety information. (Start with the policies that apply to everyone.)

The final element is **Process** — the "plays" part of the playbook. It's my favorite element: while Profile, People, and Policies make up the foundation of the building, Processes help you grow into a skyscraper because they scale your business's capacity to produce. They result in more people delivering more products and services to more customers, and doing it consistently. Processes are the step-by-step, start-to-finish sequences of accomplishing a task or meeting a responsibility inside a business.

When, Where, How, and Whether to Start

To help you decide whether your business is ready for a playbook, look closely and objectively at your business and answer these questions:

Is your business mature enough? It might be if you have at least some separation of roles and responsibilities. But it's definitely not mature enough for a playbook if only one person is doing every job.

Do you want a playbook for the right reasons? What's a big-

ger problem for your business: Is it getting more customers? Or is it being able to consistently and efficiently deliver to the customers you are already getting?

The first— getting more customers — is a revenue problem, and as you saw with our real estate client, a playbook can't solve that. If that's what you're dealing with, spend your time and energy working on marketing and sales. Delivery is an operations problem, which a playbook does solve. Documenting repeatable processes enables you to scale and meet the demand.

Why else do you want a playbook? Maybe you plan to sell the business. Or you want to create a better work-life balance; instead of continuing to allow the business to dominate your life, you want to be able to take a vacation now and then or spend more time with your family. Maybe you aspire to open multiple locations or develop a franchise. Or you might want to pass along the hands-on part of your business to free up your time for your next venture. Keep your answer to "why" in mind for when we talk about how to enlist the help of your team.

Is your team ready and willing to get behind your vision? Regardless of your rationale for building your playbook, if you don't have a good relationship with your people, you'll find it hard or impossible to get them on board. Never start work on a playbook before you're confident that you'll get their help and support— even their excitement.

Your Profile: Defining What Makes Your Business Unique

A number of items belong in the profile of your company—the first section of your playbook. Here they are in their most logical order.

Say Hello

A warm welcome is the best way to begin this section. Although it may sound obvious, give your newcomers a soft landing by starting with a simple hello. Give every new person the same enthusiastic greeting to get them excited about working with you and the process to come.

Share Your Vision and Mission

Your vision is where you expect your company is headed—an imagined end state. It's tied to your passion for the business, who you want to serve, and what kind of impact you want to make on the world. For example, back when only

the biggest companies had computers, Microsoft's vision was "a computer on every desk."

Share Your Core Values

Your values are the traits and principles that you and your team members share. Establish them early before you document your processes. Documented core values make employees confident about taking action. Even before you have specific responses for every scenario you can anticipate, having core values in place will help guide your team's decisions in the right general direction.

Communicate Your Brand

This part of your playbook is your chance to convey the look and feel of your business to your new team members. It's your business's personality, voice, and tone—whether professional and structured, quirky and casual, or something else entirely.

Introduce Your Market/Industry, Customers, and Competitors

When people search for your company online, in what category do they find you? How are you represented in the marketplace? To orient new hires to the space your business belongs in, start this part of the playbook by touching on your category or industry.

Introduce Your Products and Services

Use this part of the playbook to list your company's menu of products or services and their approximate prices.

Introduce Company-Wide Software

Provide a basic intro to only the software tools that apply to everyone, like your email and calendar programs, and chat app, if you use them. New hires will be expected to use these programs early on.

Include a Glossary

Every industry and business has its own jargon. Help new hires get acclimated to it before they find themselves lost or confused in their first meeting.

Introduce How Your Business Works

The final piece of the profile is a start-to-finish look at what actually goes on in your company so that each employee understands their place in the big picture.

Your People: Making the Map for Who's Who and What They Do

People are the most important part of your business. Even though every company's profile is unique, it can be similar in some ways to that of another business. But it's the people who really make the difference. They're who make your business what—and who—it is. It pays to invest in helping everyone feel welcome and get acquainted and in keeping their responsibilities aligned with them.

When you think about the dramatic difference between my two conference experiences, I know there's no question about which experience you want for your new employees. By building a directory, an org chart, friendly bios, and detailed roles and responsibilities, you're creating a sense of belonging for your new team members and setting them up for success.

Your Policies: Writing the Rules of Play

Your policies should never be about eye-roll-worthy layers of red tape. They need to be useful, fair, clear, and never over active. There are dozens of potential policies you may want to consider for your business. That said, there should never be any 'forever' policies. Make it a policy to regularly review your policies. To avoid overwhelming your team, throw away policies that no longer—or never did—make sense. In most businesses, people are doing obsolete policy-based tasks that were established years ago because no one has questioned them since. To avoid this waste of time, regularly review your policies and ask your team to suggest ones to get rid of.

Your Processes: Shifting from "How You Do It" to "How We" Do It"

Answer each of the questions about the responsibility or process to be able to thoroughly and clearly document it.

1. What's the process called? That might sound too obvious, but if the name isn't clear -if it doesn't match what team members expect it to be-no one will be able to find the instructions. Keep names simple and intuitive, like "Replying to Support Tickets," "Extending a Job Offer," or "Sending Out the Weekly Newsletter."

2. Who owns the process? Every process should have just one owner whose job it is to keep it up to date (and post the date it's updated), make sure people are trained in it, answer questions about it, and confirm it's getting done right.

3. What physical or software-based tools are needed to perform this process and where can they be found? Does it require a blank form or company letterhead? Is there a template for, say, a client presentation? Are there required logins and passwords? Or is background information needed, like a client profile including their order history?

4. How often and when is it performed? If you're training on the process for answering phone calls at the reception desk, provide useful context, such as whether the phone rings five times a day or five times an hour. This knowledge will help team members determine how much time to allow for this task and plan their schedules in general.

5. How long does it tend to take? This is especially useful because it communicates how long you expect someone to spend on the process. For creative shops, like web designers, do you allocate two days or two weeks for creating mock designs? To avoid applying unneeded pressure, you might add a range or mention that the process will go faster with practice.

6. How is it measured? Many processes come with important key performance indicators (KPIs) that show how good a job someone is doing. For example, a KPI might measure how quickly team members respond to customer-support tickets or the maximum percentage of tolerable waste in a manufacturing process. Some processes will lend themselves to including in the playbook how they look when they're done well. And for other processes, it might be useful to show a process done right next to how not to do it.

7. Why does it matter to the company that it's done correctly? Understanding this context helps team members buy into learning the process. If they know why the stan-

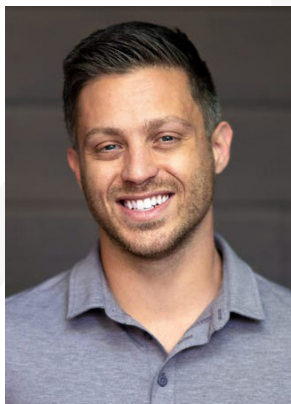
dards matter, they're much more likely to want to uphold them and to work like a human being with a heart, rather than like a robot.

8. Finally, what are the steps? Make them comprehensive and clear. Break up the steps into manageable chunks of content, no more than the approximate length of a half page of paper. This helps keep the content on the screen, readable at a glance, rather than requiring the team member to scroll through endless text. Better yet, whenever possible, incorporate screenshots, videos, or screen recordings. If a picture is worth a thousand words, a video is worth thousands of pictures!

Conclusion

Your small business will stay small if you can't manage to remove yourself from the day-to-day hands-on running of it. You can scale only if you delegate tasks and operations to your team and trust them to deliver. A playbook that documents your processes, policies, and culture is the best way to get your business out of your brain and into theirs.

Now that you have the tools to collaborate with your team and capture the knowledge and uniqueness that exists in your company, I hope you'll use this book as a roadmap to create a playbook that will do wonders for you, your business, and everyone on your team.



Chris Ronzio is the Founder and CEO of Trainual, a leading SaaS platform transforming the way small businesses onboard, train, and scale teams. A two-time EY Entrepreneur of the Year Mountain Desert Region Award finalist and Phoenix Business Journal 40 Under 40 Awards recipient, Chris is on a mission to help business leaders document and delegate so they have more time to focus on the things they love. Serving businesses in over 170 countries, Trainual has been recognized on Inc.'s 2021 Best Workplaces list and landed #1 on AZ Central's inaugural top workplaces list for 2021. Chris hosts The Fastest Growing Companies and Organize Chaos podcasts.

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