Understand 'what you do' with a task audit

A great tool you can use to unpack what you (and your team) do in your business is a task audit

It is simply an organised log of what you do each day, and a way to identify where you are spending time. It helps to get all the 'what' of the business out of your head and onto paper!

How to do a task audit -

- 1. grab a notepad or open up a spreadsheet
- 2. set up columns for task, day, and how long you spend (if you want you can also track the area of the business it applies to)
- 3. over the course of a week note down the tasks that you do
- 4. review the list

For example -

type	task	day	time
accounts	invoice customers orders from the weekend	Mon	80
management	team huddle	Mon	20
accounts	check email for new bills	Mon	10
sales	call new lead	Mon	17
accounts	go to bank, download transactions	Mon	10
accounts	reconcile accounts	Mon	60
accounts	collect paper receipts - manually enter into accounts	Mon	60
management	coaching conversation	Mon	20
		Tue	

Task Audit Template

type	task	day	time
_			

Understand 'how you do it' with a process map

A **process map** is a quick and easy tool that you can use to visually describe the flow of work in your business. It can show who and what is involved in a process by outlining each step of a work activity.

Process maps use a few basic shapes -



How to do a process map -

1. define a starting point

what is the trigger that kicks things off - a new customer? new sale? new job? a fault? draw a box and write it down



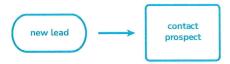
ask yourself - 'what happens next?'

If it's an activity, draw a box next to the previous step and describe what happens in simple words. If it's a decision draw a diamond and write the question being decided in the diamond



draw an arrow that shows the direction of each step of the process

Lines illustrate relationships, and arrows help show direction and flow in the process. Process boxes only have one arrow. Decision boxes can have multiple reflecting the different outcomes of the decision. Label each path of a decision (for example - yes or no)



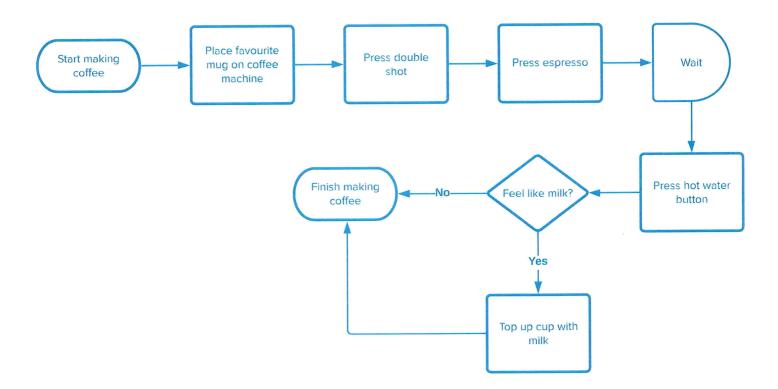
4. keep going until you get to the natural conclusion of that process



How I make a coffee - a process map

Most businesses have similar processes in how they do things. Especially when in the same industry. The general details of workflows are common.

It's in the detail though that things can differ, and it's those details that are important to iron out with any cloud app providers to make sure they either do what you need, or you know if there are changes to make in how you do things



Create a shopping list

Create a list of things are important for you to be able to do with a system, then use this to compare functionality between different apps out there in the market. You can find apps for your industry by visiting your accounting provider, googling, looking at sites like , and asking others in your industry or industry groups

For example -

capability	Dext	Hubdoc	VeryFi
take a photo of a receipt on my mobile		X	Х
read the receipt and do the data entry for me		X	X
push that receipt into my accounting system		×	X
know when i've already reconciled the receipt			
know when i've already pushed that receipt into my accounts before	Х		
99% or greater accuracy		Х	
receipts instantly appear in accounts			X

App Comparison - Shopping List

capability		