

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 -

[illegible]

Task Audit Template

[illegible]

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.

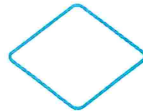
Process maps use a few basic shapes -



start or end
of a process



an activity to
be done



a decision to
make



the direction
of the flow

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



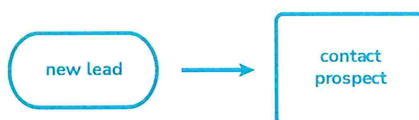
2. ask yourself - 'what happens next?'

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

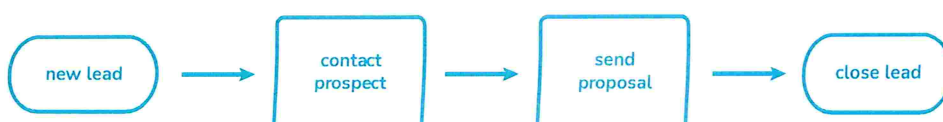


3. draw an arrow that shows the direction of each step of the process

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)



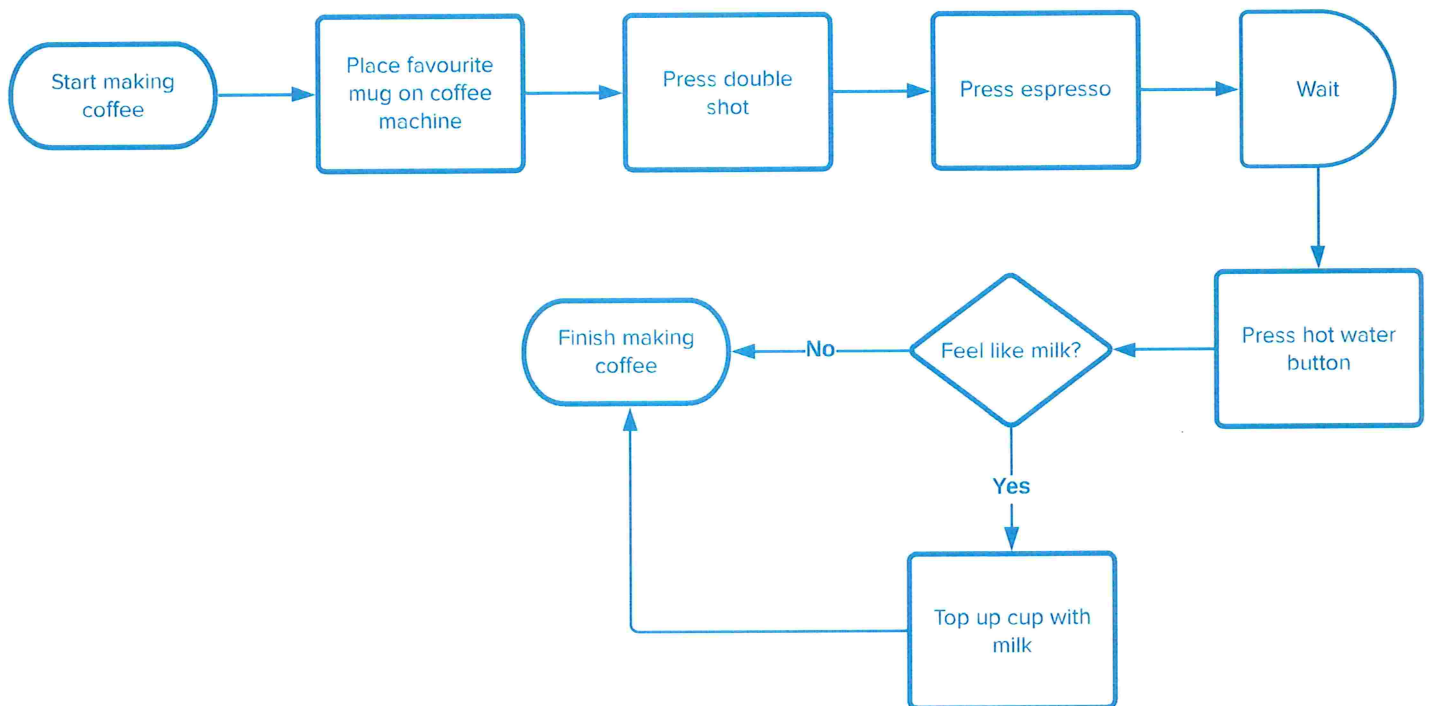
4. keep going until you get to the natural conclusion of that process



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



capability

[illegible]

App Comparison - Shopping List

[illegible]