



9 Steps to Organizing the Chaos in Your Business

Every successful business has chaos. The trick is keeping it **organized**.

1. Create your context

What do you want to get out of your business?
After working with hundreds of companies, we've seen that some entrepreneurs want to build an empire and buy an island, and others just want the flexibility to take their kids to school.

Obviously, the plans needed to achieve those visions are going to be completely different.

The vision that you're seeking is a personal decision, but it's important to be clear about what it is.
Think about your life in 3-5 years...

How many employees will you have? How many locations?
Where will you live? What will your personal income be?
How many hours per week will you work?

Do this:

Carve out 30 minutes to dream with a blank sheet of paper or a whiteboard. Something low-tech so that you can't get distracted. Draft your ideal business with as much detail as you can muster.

2. Brain dump

Ok, back to the present.

Your vision is clear but you still have a million things on your mind. If you have trouble focusing on the task at hand because issues and ideas are popping up all over the place, then you need somewhere to put them.

When we work with businesses, we start with a deep dive to uncover every opportunity and obstacle from the depths of your mind. It's kind of like cleaning out a closet; you have to take everything out where you can see it before you can decide how to re-organize.

Do this:

Use a note taking tool like [Evernote](#) or a task manager like [Todoist](#) as a catch-all for your thoughts. Don't worry about organizing. You just need somewhere to dump your raw thoughts when you're at a red light or in line at Starbucks. Processing comes later.

3. Map your process

Your business has a core process for how you do what you do.

Have you written it out in full? Have you created a diagram or flow chart that shows every step in your assembly line?

Most companies haven't, but doing this will show you where all the weak links in your chain really are.

Think about every step along the way, from how new customers find you, to how you issue proposals, deliver your product or service, and collect payment.

Which people or departments do what? Which software tools do you use along the way? And most importantly, where are the bottlenecks or areas to improve?



Do this: _____

Diagram your process with [LucidChart](#), a simple tool for mapping any process in a visual way.

4. Interview your employees

Most of the best ideas for how to make your business better are stuck in your employees' heads.

But, few employees will criticize the company and point out opportunities for improvement. There must be a reason that you do it the old way, right?

Tolerating the status quo is the easiest way to stifle innovation, so encourage change by rewarding employees with good ideas.

When we work with a company, we ask every employee 40-50 confidential questions about how to improve efficiency and increase capacity (cue *Office Space* jokes). But seriously, encouraging unfiltered feedback is gold.

One of my favorite questions is, "If you had a secret employee that reported only to you and no one else knew about them, what would you put on their plate?" Talk about low-hanging fruit.



Do this: _____

Create a simple survey with [Typeform](#) and blast it out to the company. For the best answers, let all respondents remain anonymous.

5. Find quick wins

This one is crucial!

If you've taken the time to dig deep into your brain and survey all of your employees, you've no doubt uncovered a lot of possibilities. That can be overwhelming.

How many times have you gone to a workshop and never opened your notes again? Or purchased a book only to let it sit on the shelf?

Big projects take big effort, so you need to get things started with a little momentum.

With every project we do, we recommend finding 5-10 tiny takeaways that you can fully complete in less than 2 weeks. Does someone need a new computer monitor? Buy it. Is there an upgrade available to a core piece of software? Install it. An employee is overdue for a review? Schedule it.

Acting on these things shows everyone that their feedback was worthwhile, and you'll get buy-in on the more important projects.

6. Prioritize your projects

Ok, if you've gone through this process you probably have hundreds of Ideas, Issues, and Inefficiencies™.

All of these are possible areas in your business to put attention toward, and as you read through them you'll notice some commonalities. First, make sure every item is actionable.

For instance, if an employee says, "The company holiday party is a joke, it's like the company doesn't even care about us," you could create action items to "Collect suggestions for new holiday party format", or "Write personalized holiday cards to all employees by November 15".

Notice that both start with a verb so that when you see them on a list, you know exactly what to do.

Start to group related items into larger projects. Typically, you'll find that projects involve some objective related to Growth, Operations, People, Money, or Leadership.



Do this: _____

Pick the easiest thing on your list, and check it off today. Then pat yourself on the back. You're making things happen.



Do this: _____

Combine action items as much as you can, then pick your top 5 projects. It's tempting to want to do everything on the list, but that's unrealistic. You have to start somewhere, and when you finish the first 5, you can revisit the list or start back at step 2 to create a new list.

7. Build your execution plan

Strategic plans get all the press, but execution plans are what move the needle.

An execution plan consists of your top 5 projects, with 3-5 milestones or tasks for each project. Think of it as a roadmap for the next 3-12 months.

A tactical, step-by-step process to laser focus your attention on exactly what needs to be done in your business, and in what order.

Every item on the list should be ARMD; Actionable, Realistic, Measurable & Dated.



Do this: _____

Projects and tasks need a project management system. We recommend [Asana](#). It's flexible and scalable, and we use it for everything. Sign up for free and build out your first project.

8. Outsource & automate

With your execution plan in hand, the workload might be daunting. Don't worry, not everything should be on your plate!

Your company probably spends most of its energy on serving your clients or customers. That makes sense, it pays the bills.

So, support your own business with other experts to get things done faster. We worked with one client that insisted on delivering his own product (a \$15/hr job for [Roadie](#)), and another client that was struggling to create a new logo (a simple job for [99Designs](#)).

Let go of the stuff that will never make it off of your to-do list. Even better, use a tool like [Zapier](#) to automate burdensome processes. It can free up a lot of time.



Do this: _____

Be honest with yourself. Circle items on your list that probably won't get done unless you hire someone else to do them. [Upwork](#) is a great place to start!

9. Stay accountable

What was your New Year's resolution last year?

You probably don't even remember, because almost no one keeps them! A client of ours owns a gym, and they make more money on the people that don't go than the people that go.

People aren't great at accountability. It's hard.

So, if you want to make progress on your plan, you're going to need some help.



Do this: _____

Assign someone to be your internal project manager, and give them the authority to hold everyone responsible for their tasks, even you.