The Process Playbook

Your blueprint for standardizing, optimizing and documenting your accounting firm's critical processes.

KARBON

Work smarter, not harder

Life in an accounting practice is dictated by processes. Day-to-day, week-to-week, year-to-year—even moment-to-moment.

A firm with standardized processes moves through these moments efficiently, with each action—be it onboarding a client, filing a tax return, or monthly bookkeeping—completed much the same way each time by each team member.

Better yet, a firm that has documented each of these standardized processes is able to operate effectively and scale without increasing overheads.

These firms are well-oiled machines. Their owners rarely miss deadlines, sleep well at night because they're confident nothing will fall through the cracks, have complete visibility across each process and, importantly, each process is optimized and easily repeatable. These firms are leading the way in efficiency. They're working smarter, not harder.

On the other hand, firms without standardized and documented processes risk mis-firing each time an employee sits down at their desk. They're leaving themselves open to lost time and money, unable to scale, providing clients with inconsistent experiences, and reinventing the wheel with each engagement.

> "We discovered that our clients were getting vastly different levels of service depending on who was doing the work. Standardizing the process makes sure that we provide consistent quality for all of our clients regardless of who is doing the work."
>
> — *Max Ducharme, Avrio Solutions*

But standardizing your high-value procedures and ensuring each step is documented is a significant task. It can be difficult. It can take time. And when you've got a thousand other things to do, it might seem easier not to open this can of worms.

Despite these barriers to standard processes, standardized procedures, SOPs—however you refer to them—the benefits are too powerful to ignore. If you're serious about becoming truly efficient, the important thing is to get started somewhere. Because high-quality processes are one of the leading drivers that separate the most thriving accounting practices from the rest.

It doesn't need to be complicated—you don't need to divert resources away from clients or completely turn your business on its head. You just need to take that first step.

This guide will help you do that. It will explain all you need to know about taking your firm's processes, standardizing them to increase efficiency and documenting them to enable scalability in a simple, digestible, and human way.

HOW TO USE THIS PLAYBOOK

This playbook is broken into two parts:

The first part paints the picture of what can be achieved by a firm with great processes. It draws on the insights and input of accounting leaders who have gone through this exact process and come out the other side in a much better place.

The second part is your blueprint—your step-by-step guide, providing you with exactly how to go about successfully standardizing and documenting your processes.

The benefits of standardized and documented processes

Why bother getting your processes right?

When you standardize processes, you take each workflow, task and procedure that your firm completes—from the most basic to the most complex—and define the exact way it should be completed. From step one, all the way to completion.

There should be only one way to perform each task, or one set of steps for each type of project.

By doing this, you're leveling the playing field and:

- Increasing productivity and efficiency
- Truly understanding when and if you need to hire
- Boosting your top line

But there's no use standardizing your processes if your team members forget how to perform each step. Your staff shouldn't be expected to remember each step of each process—that's not a good use of brain power.

So, you need to ensure each process is written out, step-by-step. In doing so, you're not only making your lives easier, but you're:

- Keeping everyone on the same page
- Delivering consistent client experiences
- Enabling your firm to scale quickly
- Gaining more visibility over each process (so you can further-improve them)

The impacts of undertaking this project for your business fit into five key pillars of successful accounting firms:

1. Profitability
2. Talent management
3. Productivity
4. Team alignment
5. Client satisfaction

Profitability

Boost your top line.

When you standardize your processes, you're looking for better and smarter ways to operate. You might completely reimagine certain tasks, but for others, you may only need to tweak a certain step. When that step is carried out 10 times per week, that incremental improvement will add up over time. And if your firm has fixed-fee pricing based on value versus charging by the hour, then you'll be rewarded significantly.

PRO TIP

Setting your fee structure to maximize your efficiency gains

If you charge by the hour, efficiency gains act as penalties: if your processes are more efficient, you're spending less time performing them and, as a result, charging less for them.

But that shouldn't deter you from boosting your firm's productivity.

The answer to this is **value-pricing**. When you set your pricing upfront based on the value you are providing your client, you're being rewarded not by the time it takes to serve them, but by the actual value you bring them.

And if you can bring them that value quicker after making a small change to your process, then you will be rewarded rather than penalized for it.

Scale quickly

When you're cooking with a recipe with clear instructions, you're setting yourself up for success as best as possible—even those who aren't the greatest cooks.

You know what ingredients you need and when, what equipment you'll use, and how long it will take to prepare and cook your meal. But without this information, the task becomes harder than it needs to be.

The same logic applies to standardizing and documenting your firm's processes: when everything is laid out for you, you're already on the front foot.

Time isn't wasted trying to find out what systems you need access to, or searching for client information, or what critical actions are actually involved in a particular process.

> "Ideally, documentation leads to less confusion, a place to re-muster if things go sideways and a solid foundation to build the business on."
>
> — *Victoria Peters, Envolta*

When you don't have to search for the information or try to remember what comes next, you save time. When you save time, you increase your productivity. When you're more productive, you can complete more work. And when you can complete more work, you can boost your top line.

Plus, with more efficient processes, your firm's growth won't necessarily mean you need a larger team. Instead, your current team has increased capacity to produce more work and/or diversify your offering. You may want to delve into financial planning or HR advisory services, for example.

Talent management

Do you even need to hire?

Your team might be swamped and completely overrun by projects and client requests. This is a perfectly understandable scenario—accounting practices are busy businesses. Naturally, you'd consider hiring additional staff members to address this problem.

But what if your team was overrun not because there was too much work, but because they were performing common tasks inefficiently, simply because they don't know any better? If that's the case and you hire someone else, you're not solving the problem—you're feeding it.

On the other hand, if your processes are standardized and clearly documented, and your team is performing efficiently, your firm's productivity should increase. And maybe you don't actually need to hire that extra body.

Create consistency with your new hires

A [standardized staff onboarding process](#) ensures everyone receives the same kick-off at your firm. This means no one misses out on understanding your accounting practice's mission, values, and other critical aspects of your business.

> "When it comes to documenting processes we have learned that there is value beyond just having a document to refer to. New hires and newly promoted team members have expressed how documentation gives them something to grab onto in those early and often overwhelming days."
>
> — *Victoria Peters, Envolta*

Not only that, but a documented staff onboarding process means you don't have to hand-hold when welcoming new staff members. You can get them set up, and let the process take the lead.

And this means you can get back to doing what's truly important: running your accounting firm and growing your business.

FIRM SPOTLIGHT

Avrio Solutions, US

For many years, our company has survived through the excellent and specialized work of a small group of long-term employees. There is a vast amount of 'tribal knowledge' about processes and clients that much of the long-term staff just know from years of working together.

As we have started to grow our client-base and staff, we have discovered that all that specialized tribal knowledge takes a long time to transfer to new staff. And when our new staff made mistakes, we couldn't blame them.

We decided that we need to capture our processes in lists and then standardize those processes so they can quickly and easily be transferred to junior staff.

— *Max Ducharme, Operations Manager*

Productivity

Measure and then increase productivity, efficiency and visibility.

Without a common way of doing things, there's no baseline to use when you want to measure how your team is using their time. There's simply no way of knowing if they're being as productive as possible or if they're reinventing the wheel each time they complete common tasks.

And if you can't measure, then you can't improve.

For example, without a standard way to onboard new clients, you'll lack the ability to improve because each staff member is taking different steps to get each client onboarded.

> If each of your team members are using different methods to perform the same tasks, you're running an unwinnable race.

Truth be told, you could take the time to coach each team member on their separate process, but that's an efficiency mis-fire.

By understanding why each team member is completing the process differently, you'll uncover the reasons behind these variations, highlighting efficiencies they've found along the way.

You can then incorporate them where appropriate, ultimately helping to boost productivity.

Team alignment

Ensure your team are on the same page.

Without standardized and documented processes, simple tasks can be difficult and time-consuming.

Let's take the example from above: your client onboarding process. New team members will need to be physically shown how your firm completes each task of this process (likely over and over again until they've grasped it). This might take them only a week to master, but when a process is performed once per quarter, it's going to take them longer to get a handle on it.

Instead of focusing your efforts on your clients or growing your accounting business, you're spending time training (and re-training) staff members.

But when you standardize and document your processes—think of them like supercharged 'how-to' guides—you transfer them into efficient and repeatable actions that serve as a guide for you and your staff to reference as they're needed.

When you do this, you ensure your team members are aligned with the way your firm completes your processes.

Client satisfaction

Increase client satisfaction by providing consistent client experiences.

Your clients are at the heart of everything you do at your accounting firm. Every decision you make must benefit, in some way, your clients, their businesses, and their overall financial situation. And this doesn't stop when you're considering your internal processes.

To be efficient, and also provide a great service, you need to be delivering a consistent experience to your clients.

> "Standardizing our processes helps us avoid mistakes or miss important work tasks. We are definitely much more efficient and reliable, and we know that the quality of service we provide is always at the desired standard—clients like to see that!"
>
> *Antoniya Beyriyska, Ask The Boss*

Some processes will, from time-to-time and from client-to-client, need occasional adjusting or personalization. But a standard and documented way that most work should be performed is essential.

The way to safeguard consistency is to first enable it. And this is achieved through having your firm's processes standardized and documented.

PRO TIP

Measuring client satisfaction

Consistent and efficient client experiences will most certainly improve your accounting firm's Net Promoter Score (NPS). NPS is arguably the best way to measure client loyalty and satisfaction. It measures this by asking them one simple question: How likely are you to recommend our accounting practice to a friend or colleague?

Learn more about measuring your firm's client satisfaction using NPS.

FIRM SPOTLIGHT

JVCA, UK

There is the term 'what gets monitored gets managed', and we noticed that quality varied depending on who was delivering the service, often because a team member didn't have the confidence or the experience and had to research the requirements.

By standardizing our processes, it has given our team confidence and reduced the need to search [for information] because the team works in the same way. Plus, having standard emails drafted with sections that need to only be partially filled saves so much time that we've been able to respond quicker [to clients], which has led to delighting our clients.

— *Coral Tolley-Fletcher, Partner*

Best practice steps for standardizing and documenting your processes

Step 1: Understand your current situation

Objective: Gain a high-level understanding of the processes being performed at your firm.

The first step in fixing or improving anything is understanding the current situation. Without this information, you're simply guessing at what needs to be done. You first need to understand how your firm currently operates.

Ask yourself:

- What are the most common processes we complete?

- Are any documented? If so, where and by who?

- Who is completing these processes? When, how and why?

- Are each of these processes being completed differently based on who is completing them?

- Roughly how long does each process currently take to complete?

Don't panic if you can't answer these questions immediately. If you're embarking on this journey, then there's a high chance you not only can't answer these questions yet, but you're not even sure where to start looking.

This information lives with your team, either in their heads or in various random documents or notebooks. So you need to work with them to understand what is currently happening with each of your firm's processes.

> "The simple but often tedious task of getting everything out of your head during process discovery makes recognizing opportunities for improvement 10x easier."
>
> *— Adrian Simmons, Elements CPA*

PROCESS TEMPLATE

Internal workflows audit and discovery

Complete this template to explore your firm's current processes, enabling you to identify what single process to focus on first. Spend around 30 minutes answering each question at a high level. No pre-work is necessary—this should prompt what is most top of mind.

DOWNLOAD THE TEMPLATE

Category	Discovery questions	
Most common	**Who completes this process?**	**Does any... documen...**
Example process: Client onboarding	Admin	Brief chec... in Dropbo...
Process #1		
Process #2		
Process #3		
Most frustrating		
Process #1		

This is the most overwhelming part of the entire process. You need to set aside dedicated time to work with your employees.

Start with one process

Your firm has countless processes, and it's not realistic to standardize and document them all at once. Be smart and keep it realistic by identifying one process to focus on first.

It might be the process that:

- Is the most common

- Has the biggest room for improvement

- Will have the biggest impact on your clients

- Is a large source of frustration for you

- Is the most valuable (has the most revenue associated with it)

Or maybe you'd prefer to start with the process that will be the easiest to improve. There's nothing wrong with starting with a quick win.

How to kick-off the information sharing process with your team

Consider beginning this project with a whole team meeting. Use this opportunity to explain why you're taking the time to standardize and document the firm's processes, and how it will directly benefit them.

In this meeting, let your team know which process you will be tackling first and find its owner if there is one, along with any other staff members who play a key role so you can build a cross-functional and representative working team. Afterwards, book a separate focus session with these contributors so you can further understand the process' ins-and-outs.

PRO TIP

Don't underestimate the change that will occur

When tackling a cross-departmental process, or even just a large and complex one, don't underestimate the challenges that come with change. It's at this point that you might consider creating a process optimization team of change champions.

The process owner will drive the project, and the change champions will support them, the other contributors and the wider team.

Appointing a change champion is a proven way of reducing resistance to change and increasing team-wide buy-in.

Download the Internal Workflows Audit and Discovery template on the previous page to identify the first process to focus on.

Step 2: Discover success areas and places to improve

Objective: Find out what currently works well, what doesn't, and what could improve.

If step one was you skimming the surface of your chosen process, step two is when you become fully submerged.

You need to understand the following about your chosen process:

- What parts of this process currently work well?

- Are there any issues that cause bottlenecks, delays, missed information, double-ups, etc.?

- What tools are your team currently using to complete this process?

- Are there any other tools that would benefit it?

- Are there tech or resource gaps that are slowing down the process?

- Are there any workarounds being used to bypass or mitigate slow steps or systems? If so, what are they?

Remember, the most effective way to understand the best and worst parts of the process is to ask the people actually completing it—they're often the only ones who have this valuable information

Deep-dive into a process to standardize

WHAT IS THIS WORKSHEET?

This worksheet will help you deep-dive into your chosen process to standardize.

HOW TO USE IT

Use this during your focus session with your team to ensure you collect the information you need to better-understand this process.

OUTCOME

After this exercise, you should have a better understanding of the process' gaps and areas for improvement.

1. Which parts of this process currently work well?

_____

_____

_____

2. What are the areas of concern (bottlenecks, delays, missed information, double ups, etc)?

_____

_____

_____

3. What tools are your team currently using to complete this process?

_____

_____

_____

4. Are there any other tools that would benefit it?

_____

_____

_____

5. Are there tech or resource gaps that are slowing down the process?

_____

_____

_____

6. Are there any workarounds being used to bypass or mitigate slow steps or systems? What are they?

_____

_____

_____

Outline the high-level information for your chosen processes

WHAT IS THIS WORKSHEET?

Collect the high-level information about your goals, metrics and the personnel involved in standardizing your chosen process.

HOW TO USE IT

After completing the previous worksheet, this exercise will provide clarity around your goals, who is involved and any key milestones.

OUTCOME

This worksheet should easily communicate high-level information about your chosen process to keep you and your team on track.

Firm Name: *ABC Accounting Co.*

Process Name: *Client Onboarding*

GOAL
To reduce the time spent moving a client from first conversation to performing routine work by 20%.

TEAM MEMBERS
Kim, Onboarding Specialist   *Toby, Client Manager*   *Jordan, Bookkeeper*

SUCCESS METRICS
Baseline: 25 days   *Target: 20 days*

OWNERSHIP
Process owner: Kim, Onboarding Specialist   *Approver: Cameron, CEO*

PROJECT MILESTONES
• *Proposal and engagement tool selected (to increase efficiency at the beginning of the process)*   • *Information needed from client consolidated into one request (rather than having multiple comms requesting various pieces of information)*   • *Calendar booking tool selected*   • *Template created in Karbon*

Outline the high-level information for your chosen processes

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OUTCOME

This worksheet should easily communicate high-level information about your chosen process to keep you and your team on track.

Firm Name:

Process Name:

GOAL	TEAM MEMBERS

SUCCESS METRICS	OWNERSHIP

PROJECT MILESTONES

How to gather all the information needed from your team during your focus session

During this stage, it's important that you consult every contributing member—if you don't, you risk missing critical information or steps relating to the process. For example, your firm's business tax return process may be owned by the Accountant, but also involves your Client Manager and Administrator.

Without including the Client Manager and Administrator during this meeting, you simply don't have 100% clarity over the process. And ultimately, you're not giving this project the attention it deserves and needs for it to be successful for your accounting practice. In your meeting with the contributors, you need to walk away understanding:

- Where the process differs from team member to team member

- Why the process is different

- What caused variations in the process

- The benefits of these variations

- The details of the hand offs between team members

- What systems are used by each team member and how that information is collated, augmented and passed between people

You need to finish this step with an intimate knowledge of how the process is currently carried out today. You should be able to document it as raw list of steps in a table such as the example process shown below.

Example process: Initial advisory meeting setup (created by LivePlan)

The table below details the first three steps of the initial advisory meeting setup process created by LivePlan. This is used to illustrate the detail and type of information you should have when exploring your process. The goal is to complete this for your chosen process in its entirety to give you greater clarity around its intricacies.

Download the complete version from the Karbon Template Library.

STEP	DESCRIPTION	OWNER	TIME	DEPENDENCIES	INPUTS	OUTPUTS	DUE DATE
1	Schedule kick-off meeting. Book time with client and bookkeeper.	Admin	0 hrs	Signed contract	Time availabilities	Meeting scheduled	1 day after start date
2	Prepare client's basic financial overview for 2 years	Bookkeeper	4 hrs	Client to provide historical financial information	Historical financial information from client	Basic overview of client's finances for 2 years	7 days after start date
3	Compile industry benchmark data to compare against client data	Bookkeeper	2 hrs	Step 2: Prepare financials	Industry data	Client data benchmarked against industry	7 days after start date

The first three steps of the initial advisory meeting setup process created by LivePlan

Step 3: Standardize and roughly document your chosen process

Objective: Discover a better way to perform this process, and map it out at a high-level.

Now that you're fully submerged in your chosen process, it's now time to rethink everything you just learned about the who, what, when, why and how. Along with your relevant team members, take each step and ask the following questions:

- Is this the best way to perform this task/procedure?
- Is this the best person to perform this task/procedure?
- Is this the best use of time and resources?

Remember, the goal is to not only find the best way, but *the* way this process should be performed at your accounting firm.

That means analyzing each step to determine if the step is even needed, or could be performed another way, by someone else, or via automation earlier in the process.

Because they are the people performing the tasks, consider empowering your team to take the lead here. The process owner can supervise and work with each contributor to develop a new, standardized and refined way of completing it. But it doesn't mean you should step away completely. It's important that you oversee this entire project, providing support and guidance to your team.

> "Documented processes are easier to improve, with gaps becoming obvious and unnecessary redundancies showing up."
>
> — *Victoria Peters, Envolta*

See the big picture with process mapping

Process mapping involves transforming your process into an easy-to-understand visualization. It takes a snapshot at a macro-level, giving you a high-level overview of the what, why, when and how. Ultimately, process mapping will:

- Help you visualize your process
- Provide a single view for your team to refer to
- Highlight any gaps in the process
- Highlight inefficiencies, including unnecessary steps or double-ups
- Decrease errors
- Help when comparing overlapping processes

Don't worry about how to draw your process map—the point is to make it easier to understand visually. After all, a picture is worth a thousand words, and this certainly helps when standardizing and documenting processes.

Start monthly bookkeeping → 1.0 Reconcile → 2.0 Run & review reports → 3.0 Close the books → 4.0 Prep & send statements to client → End monthly bookkeeping

Abridged example of a monthly bookkeeping process map

Tips and tricks for standardizing your first process

1. **Consult pre-existing workflow and process templates:** Don't start from scratch—there are existing templates you can use when standardizing your own process. The **Karbon Template Library** has hundreds of templates you can use either as a starting point for you to customize, or as a fit-for-purpose solution to your process.

2. **Map out your process and workflow:** Visualizing your workflow will make it easier to understand how to improve and standardize it. Physically writing or drawing it out—even when you don't have all the answers—will help you get a visual overview of your process.

3. **Just make a start:** You're not going to have all the answers immediately, but you need to get started to get somewhere. So begin with what you know and don't get hung up on getting 100% of the details perfect—you can fill in the gaps as you go.

4. **Don't forget the client experience:** The main pain points you're trying to solve involve the way your team operates, but that doesn't mean you shouldn't consider how that impacts your client experience. Make sure your refined and standardized process makes sense for your clients too.

5. **Introduce technology carefully:** Remember to only use technology where it makes sense and where it will genuinely improve process efficiency. When introducing new apps, make sure you train your staff properly—if not, it will be a complete waste of time and resources, and ultimately, it will fail to do what it's trying to achieve. And remember, don't turn to technology to solve your problems—first optimize your process, and then use technology to bolster it.

> "Use technology to enhance processes and not to replace processes."
>
> *— Adrian Simmons, Elements CPA*

This isn't final

At this point, your process isn't set in concrete. It will always have room for improvement. But the aim at this stage is to get it to a point where it can be best-performed in your firm right now. By doing this, you can move on to the next step, while also having a base to refer to so you can keep making incremental improvements.

Step 4: Trial your new process

Objective: Give your new standardized and documented process a trial run to discover strengths, weaknesses and insights.

Once you've refined your process, created high-level documentation and your process optimization team are on the same page, it's time to implement your improvements.

It's important that you define a clear trial period—without one, chances are you may ever get around to analyzing your results.

If you have decided to standardize a seasonal process in your off-season (for example, tackling your tax preparation process not actually during tax time), don't wait until it's on-season to trial it.

Simulate the situation and use the process to walk-through what should happen to understand if it will work when the time comes.

> Every process should be walked through end-to-end in some way prior to being in full production.

During your trial period, empower your team to scrutinize the process, tools and documentation.

They need to tell you:

- What works
- What doesn't work
- The areas for improvement
- If there are any oversights or double ups

Step 5: Evaluate the trial, make improvements and rework

Objective: Use the insights from the trial period to improve your standardized process.

After your trial period finishes, it's important that you gather all the feedback you've received from your team, and review and address it.

You may need more information from them, so consider empowering the process owner to gather clarification with you providing guidance where needed.

It's important that you and your team take the time to complete this step and adjust the process. If you're not tweaking it, then you're not scrutinizing hard enough.

Set benchmarks

As a result of this trial period, you now have updated performance benchmarks. These may indicate:

- How long the process takes to complete overall
- How long each section of the process takes to complete
- How detrimental any bottlenecks are to production times

You can use this data to create or refine individual KPIs or to use with periodic check-ins regarding the process' performance.

Step 6: Clearly document your new process

Objective: Ensure your standardized process is clearly documented step-by-step and filed in a way that makes sense.

You can't expect your employees to remember every single step of every task they need to perform. So, it's important to document your process before sharing any updates with them. Plus, when you've documented the process, you'll find it much easier to review and further refine it.

What's involved in process documentation?

Your process documentation should aim to achieve one thing: be as clear as possible so that any new hire can follow each step and get the same result as you or any other team member.

> "Write your processes, maps and documentation for the most junior person on the team. This ensures nothing is missed and also helps delegate more effectively."
>
> — *Steph Hinds, Growthwise*

Strong process documentation highlights:

- Systems and tools required
- The frequency of the process
- Key personnel involved
- Any other notes that are important when performing the process
- The actual steps involved

Organizing your process documentation

If you've taken the effort to standardize and document your internal processes but haven't organized them in a way that makes sense to your team, then you've only done 80% of the work.

If your team can't easily access and navigate your documented processes, the time and effort you've expended until that point is wasted. This is particularly important when you're at the stage where you've standardized three or more of your processes.
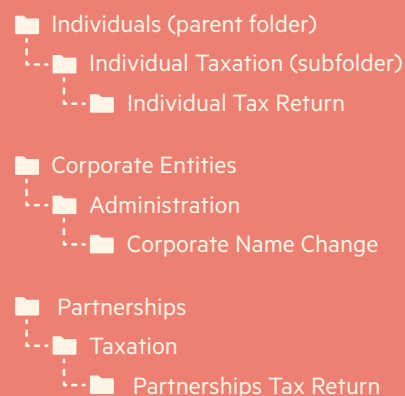
You need to create a system that organizes your process documentation in a way that makes sense to your team so they can:

- Easily access the information they need to serve clients
- Complete work more efficiently
- Be more productive
- Not waste time trying to remember next steps or searching for the steps
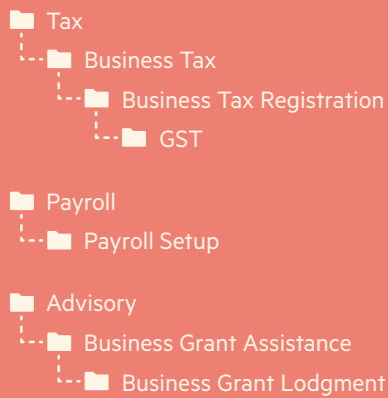
PRO TIP

Organize folders by client-type

This involves housing processes relating to a specific client-type under a parent folder, for example:

- 📁 Individuals (parent folder)
  - 📁 Individual Taxation (subfolder)
    - 📁 Individual Tax Return

- 📁 Corporate Entities
  - 📁 Administration
    - 📁 Corporate Name Change

- 📁 Partnerships
  - 📁 Taxation
    - 📁 Partnerships Tax Return
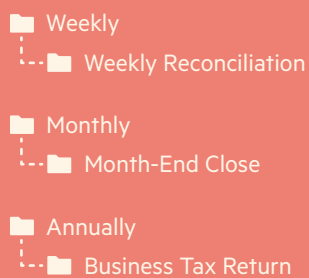
PRO TIP

Organize folders by work-type

This involves creating parent folders for each of the types of work your firm performs (or your services) and then using subfolders to get more specific. For example:

📁 Tax
  └── 📁 Business Tax
      └── 📁 Business Tax Registration
         └── 📁 GST

📁 Payroll
  └── 📁 Payroll Setup

📁 Advisory
  └── 📁 Business Grant Assistance
      └── 📁 Business Grant Lodgment

PRO TIP

Organize folders by frequency of tasks

Some processes need to be completed at certain frequencies. Be it weekly, monthly, bi-monthly, quarterly or annually, this method may make the most sense to how your firm operates. For example:

📁 Weekly
  └── 📁 Weekly Reconciliation

📁 Monthly
  └── 📁 Month-End Close

📁 Annually
  └── 📁 Business Tax Return

Step 7: Clearly communicate with your team

Objective: Ensure each staff member understands the refined process and where to locate process documentation.

Communication is the most powerful tool in your accounting firm. Similarly to a poorly documented process, a poorly communicated process is close to useless.

Now that your process is standardized, documented and organized, your team needs to understand how their day-to-day is impacted.

They need to be aware of:

- The logic behind the standardized process (your process owner and change champions need to help provide this logic and help others understand it)

- Any new systems or tools you have introduced, including why they're being used

- Where to find the process documentation

- Their responsibility to scrutinize the process and documentation, and provide feedback (including how and when to do so)

- When and how their training will take place

It's critical that you communicate this information in a one-to-many format to ensure consistency in your message (and to avoid having to have similar discussions multiple times). This way, each team member has been given the same clear information, leaving no chance that one team member has more insight than others. This helps you to achieve a level playing field and an optimal benchmark for measuring the success of your process standardization.

Step 8: Roll your new process into production

Objective: Team-wide adoption of your new standardized and documented process.

At this point, your new standardized process and documentation are ready to be rolled out to your wider team.

It's critical that they're trained in preparation for this roll out. Consider empowering your process owner and change champions to create training sessions.

For large, cross-functional processes, break your wider team into smaller sections so you can deliver more intimate training. Your change champions can take ownership of training a group each.

It's also important that everyone involved in your updated process has access to:

- The tools they need, including the correct access permissions
- The process documentation
- A formalized outlet for feedback, such as a dedicated Slack channel or online form

Continuously review and iterate

The action of reviewing and improving your process is an ongoing step. Your process performance and documentation aren't a 'set and forget' situation—you should always be working to keep your team as efficient as possible.

> "There is always more that needs to be added to the documentation, or the existing procedures need to be regularly updated. It's an ever-evolving process that needs attention to detail and reviews."
>
> — *Antoniya Beyriyska, Ask The Boss*

Your employees should feel empowered to update the process documentation as needed and share the ways they've improved their tasks.

On top of that, consider implementing a recurring process review, where every quarter or every six months, your processes are scrutinized and updated accordingly.

What you can expect after you have standardized and documented your firm's processes

Build the firm you've always wanted

There's no doubting the complexity of this project, the time required and the resources involved. But there's also no doubting its importance and the benefits you can reap in time saved, profits increased and peace of mind gained.

Whether it's consistency in your processes, streamlining your workflows, increasing productivity, understanding your team's capacity and when you need to hire, or something else entirely—this project is not a waste of time.

Ultimately, you will build a well-oiled machine with accountable and empowered employees serving satisfied clients.
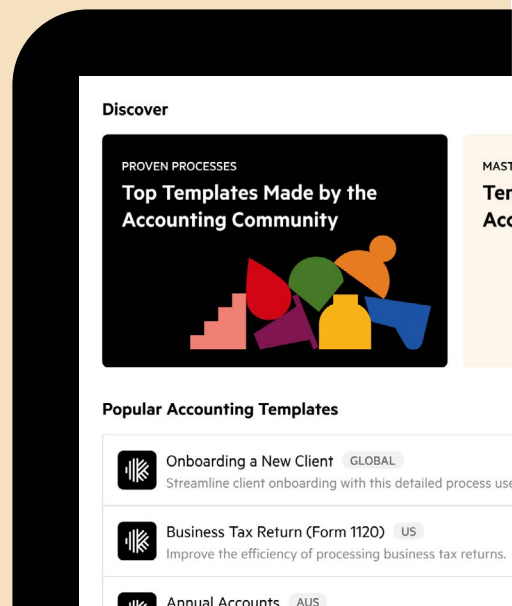
And from there, you are better-placed to scale and grow your business, bring true value to your clients, develop and train your staff members, work smarter and not harder, and build the firm you've always wanted.

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