



## Organization Planning To Positional Planning

1. Build a complete master list of all tasks – complete workflow process
2. Organize this list into operational categories
  - a. Sales and marketing – all activities required and related to the promotion and/or growth of the business – here are few:
    - i. Sales meetings
    - ii. Estimates
    - iii. Project proposals
    - iv. Sales follow through calls, emails, visits, letters
    - v. Lead generation plan
    - vi. Sales activity and results tracking
    - vii. Trade shows
  - b. Administrative – all activities required to make the business run well – all tasks that support the effective operation of the business – here are a few:
    - i. Billing/collections
    - ii. Financial reporting – knowing via spreadsheet of some other means your monthly sales, costs (variable and fixed), break even, etc
    - iii. Ordering supplies – office and warehouse (not product- but all supplies that support the flow of products)
    - iv. HR – internal files and forms
    - v. Hiring and recruiting
  - c. Production – all tasks that “deliver” the product or service to the customers – here a few:
    - i. Scheduling work
    - ii. Managing work/activity
    - iii. Materials
    - iv. Labor and materials tracking/productivity tracking
    - v. Manage deadlines
    - vi. Customer communication
  - d. Owners – lead, train and inspire the team – here are a few:
    - i. Coaching meetings
    - ii. Coaching homework (time and effort working on ways to help the business run better, grow sales, and/or expand markets)
    - iii. Manage processes – sales/marketing; administrative; production
    - iv. Lead people – internal coaching and training
    - v. Strategic planning
    - vi. Evaluate and reward performance
    - vii. Sales?



3. Assign positional titles to handle the tasks required to fulfill each category – then create an organizational flow chart.
4. Assign people to the positions – put names in the circles.
5. Develop positional contracts – stating the objectives, goals, responsibilities, and accountabilities of the position. In addition, performance standards are identified – providing a tangible source of evaluation on the part of the person holding the position and their respective manager.
6. Evaluate each positions' responsibilities and look for opportunities to system processes and planning.
  - a. recurring and/or routine activities that can be systemized for efficiency – create the system and put it on paper
  - b. establish a default calendar to plan the priority activities
  - c. develop cross training needs/back up of other positions – to cover for seasonal fluctuations, absences, etc