

# Automate Your Organization

**Kathi Roetter**



# What if you weren't there?



Can you as a leader of your organization step away and trust that the things will still operate efficiently without you?

# Can the staff or volunteers take the lead?



Do the key people in your organization know what to do if...

# HOW CAN WE AVOID FRUSTRATION?

Frustration is caused by:

- Lack of clarity
- Confusing processes
- Lack of communication
- No plan



**WE CAN  
PROVIDE:**

**VISION  
CLARITY  
CONNECTIONS  
SIMPLIFICATION**

**A PLAN FOR  
EFFECIENCY**



Use Entrepreneurial Operating System (EOS) Methods to automate your organization and set your team up for success.

# Learning from the EOS System



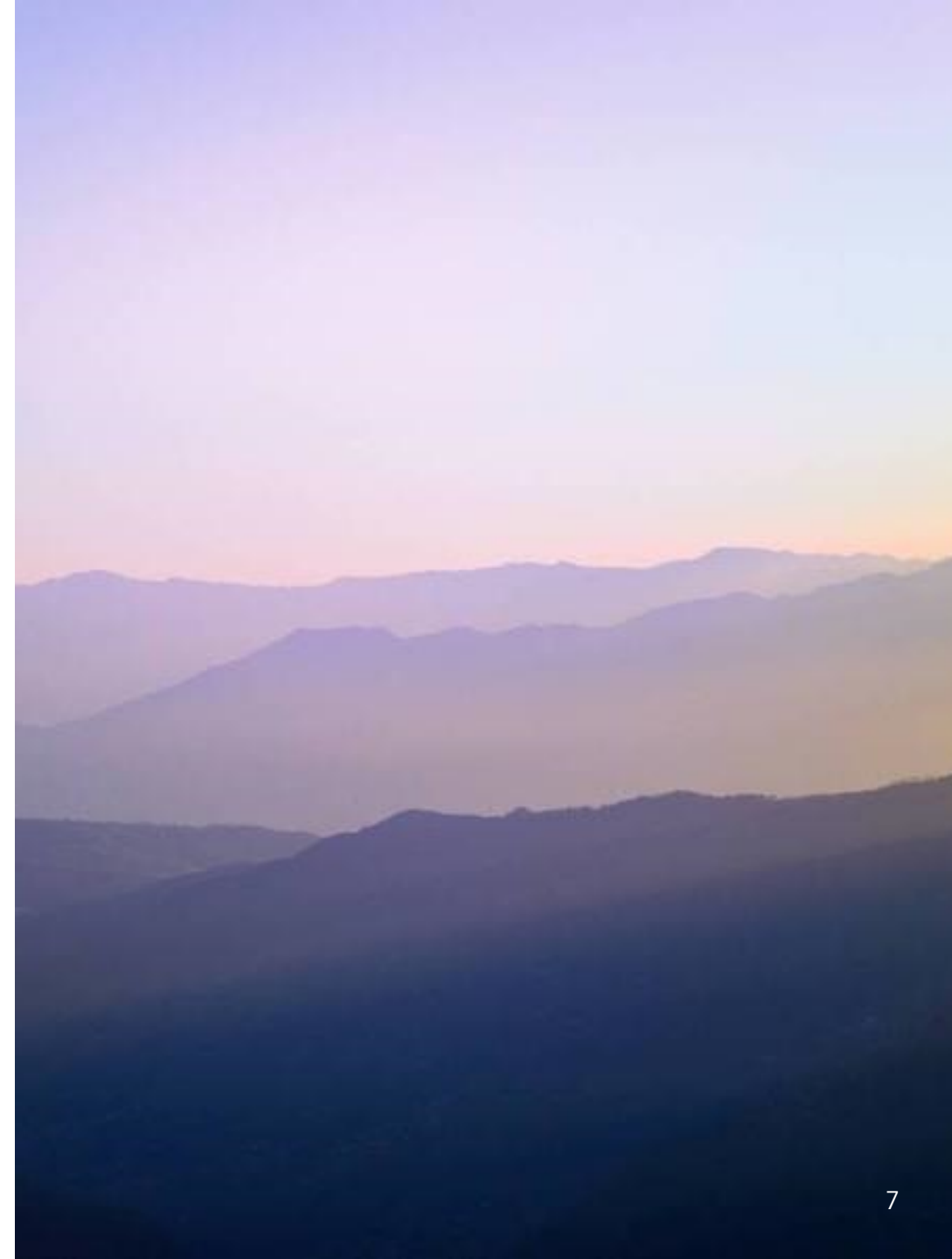
EOS System - Entrepreneurial  
Operating System

**Vision** | Data | **Process** |  
People | Issues | Traction

***Streamline***

***More efficient***

***Focused what is  
important***



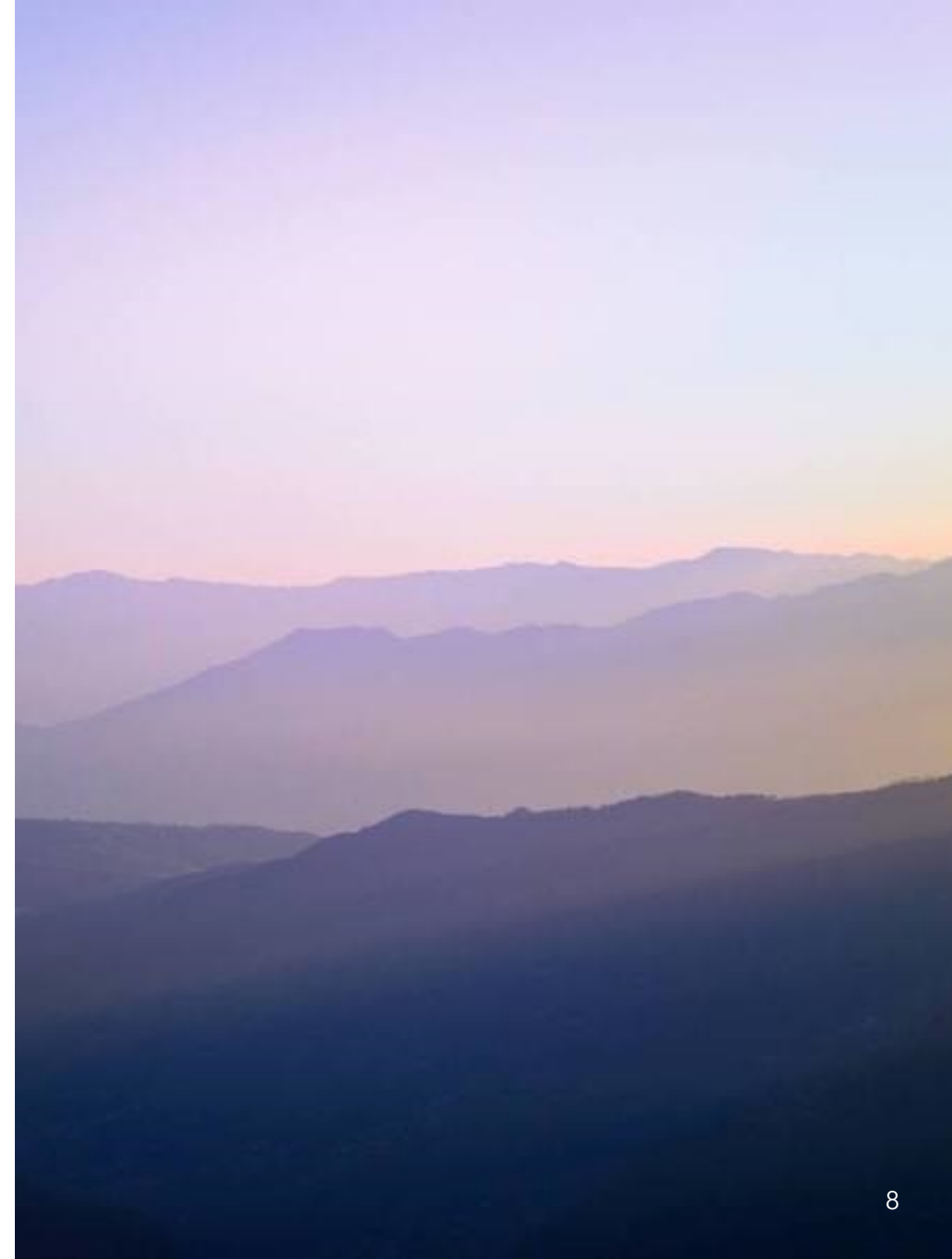
***The processing of gaining traction within your organization starts here.***

***Clarify your vision and you will make better decisions about people, processes, finances, strategies, and customers.***

***Share the vision with everyone on your team.***

***Vision and direction of the organization shouldn't change if you aren't there.***

***From Traction by Gino Wickman***





**How do you ensure that your team - staff, volunteers, board is clear on the vision of your organization?**

**Reflection**

# Processes: Leading the Way



Documenting each of the Core Processes for your organization.

# Determining What is Important



- **Gather Key Team Members**
- **5 Key Things**

Document the 20 percent that produce 80 percent of the results.

Think high level.

**80/20 Rule**

# Process Component



- Identify your Core Processes
- Document and simplify them
- Package them into one source
  
- Create a “circle of life” model
- Train EVERYONE
- Manage people to follow the core processes

Areas where you might want to create processes:

- PEOPLE PROCESSES
  - HR - onboarding an employee
  - Board - onboarding new board members
- MARKETING PROCESS
- SALES PROCESS
  - Fundraising - selling sponsorships
- OPERATING PROCESSES

**Example**

[Board Member Onboarding](#)

# WHY SHOULD YOU DOCUMENT YOUR PROCESSES?

Allows new members of the team to connect to their role and the organization

Keeps you from getting bogged down training everyone (or continuously re-training)

# WHY SHOULD YOU DOCUMENT YOUR PROCESSES?

Simplifies systems to empower team to make decisions

Avoids the learn by getting thrown in the deep in method



**35,000**

17

**We make 35,000 everyday...**



**Decision making  
zaps a little bit of the  
day and some of your  
energy as well.**

# Automation Assists with Decision Making

**The only reason you have a problem is that you haven't made a decision.**

Clarity of vision, Focus, Values and Processes gets everyone on the same team and working to move the organization forward.

# Automation to prepare for transition

Document  
to assist  
with a  
planned or  
unplanned  
transition.

# Transition



- Documented processes set an organization up for success
- Keeps the team focused on the vision. They can move on without the leader or key team member
- Create consistency
- Create a plan for the future

# Technology



Find the technology to assist with your automation.

Technology that can make the processes more efficient.

### Technology Examples:

1. Automated Email Campaigns
2. Centralized Database
3. Scoring System for Leads/Investors
4. Social Media Scheduling Tools
5. Automated responses to "contact me" emails or message on social media
6. Task Management Software - ASANA, Trello
7. Integrate a meeting scheduler - Calendly



Effective leadership is putting  
first things first. Effective  
management is discipline,  
carrying it out.

**Stephen Covey**



# Resources

