

Ten Steps to Best Business

10 steps to best practice in business information management

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Introduction

How a business manages the information that it creates, collects, uses and stores is an overlooked critical area at the heart best business practice and business success. Just how critical is often not realised until something happens that puts the business at risk. But best business is not only about risk. It is about productivity.

In fact, having complete control of business information is the only way that owners or managers are able to establish and fully monitor best practice throughout the business with the bottom line being greater productivity.

Control is also the only way that a business is able to ensure the integrity of use and access to business information by everyone in the business. It is the only way to know what is there, what is there that should not be there, what is missing and what is needed.

These *Ten Steps to Best Business* enable management to have total control of ground-breaking strategies for best business. These are strategies for working powerfully within the context of meeting all of the needs of the business now and in the future.

These ten steps are simple and yet they together hold the secret to you as an owner or manager having access for your business to the most powerful management tool seen in many decades.

Everything you need is available. Everything you want is possible.

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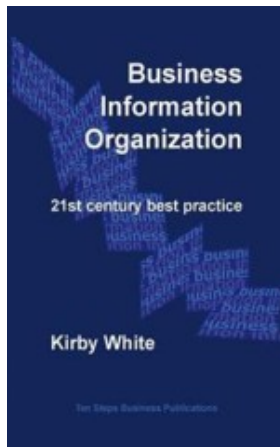


These are ten steps to *Business Information Organization (BIO) and to Best Business practice.*

These steps all add up to successfully introducing BIO into your business and may be carried out quickly or over time depending on the size and nature of your business.

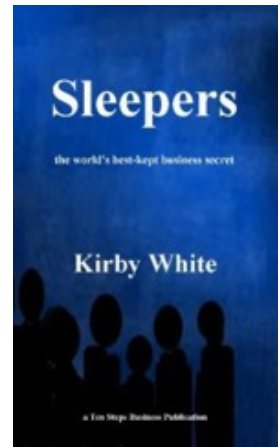
The order of these steps is paramount and the success of the project depends on each step being completed as you go.

These steps should be used in conjunction with the books,



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Step 1

Create a profile of all of your business information that gets created, collected, stored or accessed and used by the business.

- Identify the types of information used and accessed by your business. This is where you get to consider whether they are email, letters, reports, other communications and the form that they might take.
- Where does it come from and who is responsible for its existence?
- Is it information that is collected as your employees go about their work?
- Does it belong to you or does it belong to them?
- Is it information being generated by your employees?
- Is it important? How important?
- How much of it should you be keeping?
- How much of it is crucial to the way you run your business?
- How much needs to be protected for future compliance and reporting?
- Is anybody looking after it and how is it managed?



Step 2

Produce a blueprint or roadmap for locating every bit of information based on what the business does now and what it wants for the future.

- If you were designing your business on paper what would it look like?
- What would be areas you cover and what do you have now that you would want for the business in the future?
- Can you see a pattern that could describe all of the things that your business is doing now and wants to do?
- Using any of the samples, try designing a network that would work for your business. Do this without starting to plan any changeover. Try it out.
- What are the things that your business is doing that don't show up in the design of the network you have right now?



Step 3

Establish procedures to create principles to policy to compliance and determine where and how to make these known through the structure and on the network.

- What principles do you already have for your business? Have you ever made any statements about what you believe to be your business principles? For example, have you ever given any thought to the principles by which you conduct the business? Even if you know them, have you ever attempted to write them down?
- You will have areas of compliance you know must be taken care of. Can you relate those areas to principles for your business? For example, an area for compliance is the privacy legislation. Do you have principles that relate to that compliance? You may have the principle that the business will protect the interests of its customers and its staff by applying the legislation to all matters regarding the safety of their personal information.
- Do you have written policy for every area of your business? Look at each area and ask how you would ensure that your business principles, policy and matters of compliance required are addressed to everyone's satisfaction.
- Now that you have been able to create a roadmap for your business, can you see where you can place the information on principles, policy and compliance so that everyone has access to these as they work and as they deal with your organization? The simplest way to do this is to create a file called '_Policy' containing this information. Note that you can position it at the top of a folder by using the underscore symbol as shown here.
- Written policy is your communication with your employees. Written policy that sits within the context of principles and that clearly shows the compliance required is worth gold to your business.





Step 4

Set up management routines for the structure integrity, folder management and file naming principles.

- Regardless of who is responsible for creating the structure, it will need to be reviewed by all stakeholders before management gives it final approval.
- The target folders that narrow down the focus for the information are then able to be managed for their content. The way that they are managed must be about the way you want your business to function.
- Consider whether someone should be in charge of the management process. It could be a group. Larger businesses will want to appoint a Business Information Organization (BIO) manager. Once the BIO network structure is operational the amount of time to be used in its maintenance will be small.
- As the structure develops a clearer picture of strategies for naming files will appear. Rules for folder naming will be now easier and those rules will need to be made known to all employees.
- All three aspects of these management routines: structure integrity, folder management and file naming must be in place in order for the success of BIO in your business.



Step 5

Set up plans for concentrated monitoring and reviewing of the network and its contents, ensuring that the work is aligned to the aims, objectives and policy of the business.

- Decide how often your network and its contents will be monitored and reviewed once in place. This may be something that is carried out all of the time or be according to a timetable. This will also depend on who will do this work.
- The structure for your business should one than can be fixed. That is, there must be no opportunity for other than official changes or additions to the structure. Any relaxation of this rule will lead to the restoration of chaos. The policy for this must be available to everyone following its establishment.
- Identify the special aspects of your business that will impact on the timetable for monitoring and reviewing the network. For example, if your business has high risk areas, special arrangements may be necessary for special parts of the network.
- Build the risk issues into the routines you establish and these will be how you plan such aspects as the frequency of backup procedures which could also include special arrangements for high risk areas.



Step 6

Create and position, using the new structure and the network, appropriate guides to the use of business information with appropriate notes and redirections to be made accessible to all personnel.

- A good network will require high standards in the way that its structure and contents are made known to the business and its employees.
- There are two levels for this communication: across the network and within the third level folders.
- During the process of designing the network and before its implementation plans for all communications about the new network can be completed. Much of the work may need to be reviewed after the business starts using the network. The aims of Step 6 are to ensure that when the new structure is rolled out, your employees will have everything they need to feel safe and secure about using the new way of managing your business information.



Step 7

Establish procedures to implement the new structure and arrange for staff to move files and save copies of edited files to the new structure.

Create a plan to create archives for old files.

- Some ideas for implementing the new structure are to be found in the book *Sleepers: the world's best-kept business secret*.
- As every business is different both in its needs and size, there can be no standard recipe for this activity.
- Implementation will fail unless all of the considerations of the Steps 1 to 6 have been completed satisfactorily. If implementation fails, your business will return to the chaos it has experienced in the past.
- Your business may wish to put the system into one area as a test case. It should not be undertaken unless it will serve as a true guide to what the business is about. It will be of little value if it can't be given the full treatment. That is, the test case must have all of the support structure as outlined earlier.
- Establish procedures to evaluate the process and to look at the needs of the business in maintaining the network. Make sure that any evaluation is documented and reviewed.



Step 8

Train personnel to use the new network, to contribute to maintenance of the structure and to monitor its use and the integrity of the information it contains.

- Training for a business that will implement BIO will be in two phases - (1) training for implementation and, (2) training for day-to-day operation.
- Training for implementation will need to take into account the 'resistance to change' likelihood and any fears that employees may have about their personal liberties, fears of supervision and worries about how it will affect their work. Training should be focused on how this implementation will positively affect the workplace and make it not only easier to do the job but easier to resource workers.
- No employee should have any doubt as to the way that the network is structured and why and that information must be available from day one. Leave your employees in no doubt about their responsibility to maintain the system to reflect the importance of the work that they do.
- Some businesses have placed the responsibility for training in the hands of their BIO officer or officers who have charge of managing, monitoring and reviewing the use of the network for the business. Any training program associated with implementation must be approved by the management team and by key staff of the business.
- Make very clear to your staff that their personal use of the network in the future is to be a matter of review and that the material they put there will be closely monitored. Without this, a business is in danger of reverting to chaos and chaotic practices.
- Training for ongoing use of the network will provide for new employees as they sign on and for staff to review the training they have already have. All training should be reviewed and tested. Training can always be updated and employees can be encouraged to ensure the quality of every bit of training on the network provided through the network. Training



about using the folder structure can be positioned in places where employees are working on the network.



Step 9

Set up strategies for adding and making accessible any training, resources and knowledge. Make arrangements for these to be monitored.

- As outlined in the book, *Sleepers*, your new network will have now become the place where training is made available. This will make training an option not available before.
- It will change the way that you plan your training and it will allow for training to be specific to that folder or to the system as a whole. This means that a training program can be sited for specific tasks or made known over the whole network and that every person is clear about how to both site and link appropriate materials.
- The simplest way of siting information about resources is to have a file at the top of each folder. That file can be managed by those people who use the folders and it will allow them to add to or remove information on the appropriate resources for that work. It will also allow for links to resources in other places to be part of the file (this can be just by adding information or by creating hyperlinks for material elsewhere on the network or on the Internet). The file might be named something like, '_Resources Job Descriptions'. The underscore will force the file to the top of the file list right behind something like, '_Policy Job Descriptions'. Some businesses choose to have folders for these at the last level, again with the underscore to force them to the top of the folder list, eg Management\Staffing\Job Descriptions_Resources.
- The same treatment can be given to knowledge that has been collected in regard to the folder. Remember that everything in the folder will constitute 'knowledge'. Links to knowledge that is relevant to the contents of the folder will assist a business to bring everything together in the event that the business needs to present materials for any purpose. Employees must be encouraged to take stock of what is in the folder and ensure that it represents their work at any time. This should lead to careful storage of materials that the business considers to be of value



remembering that employees may continue to discard anything not relevant to their current work.



Step 10

Set up procedures required to periodically review the way that the business uses its network to support business operations, in order to manage its business information and with a view to having the structure match the direction being taken by the business.

- Now that the business has a structured network, everything about what the business is and what it wants to do is in full view. The structure serves as a big index to the intention of the business. The business can use the shape of the network to review all of its operations and plans for the future. As such, it operates as a live business plan.
- Thinking about the structure as a business plan makes it possible to see what is missing and what could make a difference to the way that the business is working. For example, in the Management\Staffing\Job Descriptions folder what might be missing is the existence of templates for managers to submit examples of the best job descriptions for use within the business.
- Contributions to the business and its operation are possible for all employees either working through their managers or adding to the information in the network themselves. For example, if an employee knows that the business has moved plans to introduce a new process into the general knowledge within the business, that is, it has created a folder on the system, it is possible to encourage all staff to add to the folder or a section of the folder, any reference or link to information that might be useful.



Conclusion:

There is much more to learn and much more to gain in setting up your network to be a powerful tool for managing the business.

The comments that go with each of the steps are a guide only and over time, it is intended to add more of these to the information on the **tensteps.com.au** website.

This is a process unlike any other. Those who have chosen to go this way have had immediate success. As the book says you only need to do any one thing suggested in the ten steps and you get to be in front.

Some businesses and their owners have reported that the biggest single thing missing in the business was written policy. This can all change.

But policy is most powerful when it is in the context of order and control.

There is nothing to lose but the chaos and chaos is definitely costing the business time, productivity and money.

It is time to change all of that and for all time.

BIO offers the business a new start and is the best way to renovate and have the best business.