



BRIEF

# Process

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## Introduction

How are new team members onboarded? What's the procedure for invoicing a customer? Who approves travel, and how are expenses submitted?

The answers to these questions often live in the head of a particular team member or with a specific team. The Process tool has two main goals:

1. Ensuring we're on the same page regarding how the company creates and delivers value.
2. Increasing awareness of procedures by documenting them.

The [Process tool](#) creates consistency across the company, and not just by making processes "official." During the documentation process, procedures that were entirely

missing are often identified and filled in. Other procedures that weren't necessarily providing value are re-evaluated. Pain points can be recognized and replaced by processes.

**Leaders have more power to scale and focus on big-picture items when everyone can easily access and follow processes.** Team members have more confidence and can take ownership of new tasks delegated to them. Shared accountability and clarity promote greater trust, efficiency, and effectiveness throughout the organization.

Dive deeper into creating great processes for your organization with our [guide](#).

## Context

Each team has a purpose that, in turn, provides value to the customer. The Marketing team generates leads, the Sales team provides customers, and the Engineering team creates a product. Each has specific tasks they perform routinely to provide value. **Process is a high-level view of how to complete those recurring, value-adding tasks.**

Identifying and developing processes is one of the most critical steps a company takes, so we've developed a system to help accomplish that. [Quarterly Planning Meetings \(QPMs\)](#) are an excellent time to start the Process journey because documenting a process makes for a good 90-Day Goal (we call them [Rocks](#)). That should indicate two things right off the bat: the journey will take closer to 90 days than a week, and it'll likely be a team effort with Milestones established along the way. Depending on the size of the organization, it could take multiple quarters to achieve a process list that truly captures everything.

**Step 1: Determine the list of processes.** Each process is agreed upon and named, usually by the Senior Leadership Team (SLT), since they have the most "top-down" view of the company. Teamwork is critical here, so this is the one step that's most important to include in the QPM.

**Step 2: Agree on who owns the Rock.** Document who is responsible for establishing each process. As with any other Rock, this doesn't mean the owner is responsible for completing all the work. Instead, the owner is responsible for coordinating the input of a few different people. It's common for a process to span multiple teams, which makes it essential for one person to pull those teams together and hammer out the steps (aka milestones).

**Step 3: Chunk each process into general steps.** An easy way to think about the significance of each step in the process is to consider which Key Performance Indicators (KPIs) and associated targets tell us this process is working smoothly.

Once the team has set the larger steps, break them into smaller sub-steps or checklists. Sub-steps are detailed descriptions that allow someone relatively unfamiliar with the task to complete the work. Next, attach any needed documents or links and provide the essential contacts for this process.

**Step 4: Take it back to the SLT for review.** Make sure to give the SLT time to review the work before meeting to discuss. This step is especially crucial for processes that flow across multiple teams or departments because all the associated leaders need to be involved.

When the team has finalized everything, and the processes are ready for the big reveal, it's time to get the entire company on board. Start by ensuring all responsible parties have access to the Process tool. This might involve activating new users as [free Observers](#) in Ninety.

Onboarding the company is a process unto itself, and we believe in kicking off an entire company meeting for the reveal. Now the task becomes educating everyone on how to use this powerful Process tool.

## Core Disciplines of Great Processes

**1. Processes typically flow across teams.** Because of that, teams need to collaborate during the initial documentation phase. Involvement from the SLT is critical; their position in the company allows for the best top-down, cross-team view of the situation. Their approval is also crucial — if the SLT has a different view on how the task creates value, deeper conversations are needed.

**2. Someone needs to be responsible for each step of the process.** Adopt a similar mindset to the Responsibilities chart or KPIs — if someone isn't held responsible, it likely won't get done. In a similar vein, one person owns a process. If multiple people try to own it, then nobody truly owns it, and confusion — or worse, dysfunction — eventually spreads.

**3. Think of each process as an evergreen document.** As the company grows, processes will need to grow along with it, so they're worth revisiting and refining.

## Hopefully Helpful Hints

**The 80/20 rule is very much in effect here, but reversed.** Focus on the high-level, top 20% of tasks that bring value, and they'll likely cover 80% of what's needed. Burying the process in detail will take up too much time and could also lead to over-prescribing the task. Give those following this process in the future a clear direction, but don't hold their hands.

**Include the secret sauce that sets your company apart.** The SLT has outlined the unique actions that make the company stand out in the [Vision tool](#). How are those actions delivered and documented?

## Takeaway

We alluded to it earlier, but it's worth repeating: It's critical that the entire company is on board with the documented processes. When applied correctly, each process is the way of completing a task. If someone chooses not to follow the process, other areas of the company will be affected. That said, don't shy away from making beneficial changes to a process. As long as everyone has access to the Process tool (either as a full User or as an Observer in Ninety), everyone will be on the same page.

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