

The Accessible Business Toolkit



CREATE YOUR KNOWLEDGE BASE

- Who does what?
- How does it get done?
- What are the terms of success?
- How do we define an incomplete project?
- What are the steps required to make this thing happen, the same way, every time?

Your knowledge base is for **EVERYONE**. Knowing what the expectations are will make all of these expectations easier to manage.

Standard Operating Procedures are your boundaries. Defined, and on paper.

POLICY AND PROCEDURES:

This list is far from exhaustive, and not specific to your business. But it's a good reference guide.

Departments of Work:

- Strategy
- Marketing
- Advertising
- Sales
- Public Relations
- Finance and Accounting
- Operations
- Human Resources
- Ethics
- Technology and Equipment
- Research and Development
- Production
- Distribution
- Customer Relations

Prompts:

- Who manages this department?
- What is the department's budget?
- Is there a clear set of goals, outcomes and KPIs for that department?
- Is there a process for reviewing KPIs and eliminating bottlenecks and inefficiencies?
- Is there a plan for leadership transition?
- Are the right people doing the right jobs?
- Is the person closest to the problem empowered to solve it?

Structural Assets:

- Content
- Methodology
- Registered Intellectual Property
- Philosophy (Values and Why)
- Identity (Brand Kit)
- Ambassadors
- Positioning
- Prospect Attraction
- Channels
- Sales Conversation
- Data
- Gifts
- Product for Prospects (Lead Magnet)
- Core Product
- Products for Clients
- Marketing and Sales Systems
- Management and Administration Systems
- Operations Systems
- Delivery Systems
- Financial Systems
- Key People of Influence
- Business Plan
- Lifestyle Design Map
- Profitability Plan
- Valuation
- Structure
- Risk Mitigation

POLICY AND PROCEDURES:

This list is far from exhaustive, and not specific to your business. But it's a good reference guide.

Strategic Documentation:

- Glossary of Terms
- SWOT Assessment
- Ideal Client Avatar
- Customer Journey
- KPIs
- Lineage
- Documented Role Descriptions
- Accountability/Organization Chart
- Feedback Process
- On-boarding Process
- Team Handbook
- Training Videos
- Structured Performance Reviews
- Flexibility Policy
- Accessibility and Accommodations Policy
- Ongoing training and development programs
- Remuneration and rewards structure
- Disciplinary and complaints policy
- Communications tools, maxims and decision-making guides

CREATING SOPs:

Creating your SOPs is easier than you think. Build your framework first, with one of these tools.

- Notion (with templates) Notion is a blank slate, which can be intimidating, but once built, it is incredibly adaptable.
- ClickUp If Asana and Google Docs had a baby, it'd be ClickUp, and being able to keep everything in one place can be helpful.
- Airtable is incredibly versatile, especially if you use automation for client management.

Can you use Asana, or Trello, or Google Drive, or any other project management tool? Yes, but. There are clear limitations to building with these platforms, so only use them if that's where everything else is already.

Once your framework is built, use the tools designed for this specific function.

- Loom is the easiest to use--just record your process, add captions, and you have a video recording of a specific procedure.
- Scribe will actually create your process documentation for you. You record your workflow, customize the guide it creates for you, and then embed it into your framework of choice.

Again, there are lots of ways to do this, but the reality is that if you were gonna do this some other way, you'd already have it done.

WHAT DO YOU NEED?

Take a few minutes and make a list. What policies and procedures do you need to define?



How would that benefit your business?

