SIX KEYS TO SMALL BUSINESS SUCCESS

Introduction

Small business owners usually focus on growing their business. And while creating products, building awareness, and selling to a target market can all contribute to growth, don't overlook how technology can support that growth. With the right technology, you can grow faster, scale more efficiently, and even delight your customers, creating powerful long-term growth.

Look at your systems and processes with the following six key ideas in mind. These ideas will help any small business do what they do best – but even better and with more profit.

- Efficiency
- Unification
- Communication
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- Collaboration
- Customisation

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Chapter 1

Efficiency

Many small businesses stick to their current processes simply because that's how they have always done things. More than a few believe their process is actually the key to their success; after all, they spent a huge amount of time perfecting it! But the truth is that unless you are talking about a secret recipe, the process, i.e. the way you do things, is not your company differentiator–the end result of your process is.

That means you should always look for more efficient ways to produce the same product or deliver the same service. You don't have to actually change the products or services, just how you get them done. Of course, more efficient processes may lead to new products, innovations, or services too.

The fastest way to add efficiency is through automation. Look for redundancies in your process that you can eliminate or streamline through automation. Also look for ways to improve your processes so they can scale with a sudden, unexpected increase in business or with the growth of your company. You shouldn't have to reinvent the process or make massive changes every time a new opportunity comes along. Nor should you have to pay for more than you need during slow cycles.

Check your workflows and processes to find where staff time is being wasted, where deliveries are being slowed, where customer orders are bottle-necking, and other lurking time wasters. Each of these areas is a prime candidate for automation.

Not sure how to check all that? Analytics will help you, so look for a platform that offers strong analytics, too.

> We have a large client that has three times the number of call center agents as we do. We make as many phone calls in a single day as their entire call center staff makes in a week.
>
> **Thad Pucket**
> VP of Technology
> The Karis Group

Chapter 2

Unification

The typical small business runs on a shoestring budget and a bit of a jerry-rigged system. It's common to see older equipment running even older software, and that's not entirely attributable to the knots in the shoestring budget. Many small businesses are simply more comfortable using familiar software and hardware, so they're hesitant to change something they think is working well.

The problem with this kind of thinking is that these small businesses are overlooking one simple fact: their business changes all the time. So while the system may not be broken, it still may not fit the needs of their growing company, much like a growing child who outgrows perfectly good clothing. And it can happen pretty fast.

Pretty soon after you start business and get it off the ground, it will be time to rethink your processes and systems, and develop them to accommodate and accelerate your success.

First, consider how you might want to unify all that data you have locked away in this and that program. In each of those silos, information is growing at a phenomenal rate. Think of it as the virtual version of a warehouse full of paper files. Yes, the info is in there somewhere, but how will you find it? And how will the rest of your staff even know it's there? Don't forget that stack of business cards on your dresser, those notes on the cocktail napkin, and all the other bits of information you collected with good intentions – but they never made it into your computer.

Nobody's got the time to do all that by hand. You need a system that will pull all your business information together and make it accessible to everyone in your organisation. You need a platform that will also capture all the information from cocktail napkins, business cards, notes, and emails, so no information or opportunity is lost and it is easily shared by everyone in the company.

This means you'll need to spend some money, but it's a wise investment in your business that will definitely pay off. The alternative is to let your business grow itself into unprofitable chaos.

Our internal systems were our worst enemy. It was really debilitating. We had no process integration, our customer service suffered significantly.

Eric Edelson
Vice President/Co-Owner
Fireclay Tile

Chapter 3

Communication

In every small business, owners and employees wear multiple hats. And despite everyone pouring in late-night hours to cover all the tasks, there are still ample opportunities for big things to fall between the cracks.

One huge concern for business owners is communication. Did someone remember to follow-up with Customer X to see if the problem was resolved? Did anyone change the order with Vendor Y, after receiving the customer's special order? Did anyone think to notify accounts payable to slow payments for a few days because that new huge order will require an upfront, substantial cash outlay? And on it goes. Timing and communication are everything.

Someone in the business knows a situation exists, but if that situation is not communicated to the necessary people in a timely manner, the ramifications can be harsh. It might be a matter of revenue lost or a lawsuit waiting to happen. It may even be enough to force the company to close – all because someone knew but didn't communicate it to the right people in time.

With so much at stake, it doesn't make sense to leave communications at the mercy of human memory. The far better course is to ensure all conversations are tracked and routed to the right people instantly. And in some cases, conversations should be automated.

There's already a way to make sure communications with customers, vendors, staff, and business partners are taken care of every day. It's also an excellent way to keep up with all those different conversations without asking anyone to repeat themselves all the time. It's called customer relationship management (CRM).

In CRM, all conversations are automatically tracked for easy reference by any necessary staff member at any time. This means that customers don't need to repeat themselves from one staff encounter to the next, and staff members don't need to remember to update someone in another department about a developing situation. Plus, you can easily target and automate some communications to make sure the conversation continues without lag time for manual responses. In this way, sales leads are also converted into actual sales at higher numbers and more rapidly than your staff could accomplish manually.

The alternative to CRM automation is to keep doing what you've been doing: just stay up all night working. Or worse, tossing and turning, hoping you got to everything in time.

Getting together once a year at our conference just isn't enough in today's world. We need to communicate a lot more than that.

Peter van Stralen
CEO
The Grounds Guys

Chapter 4

Accountability

True accountability isn't achievable through the use of siloed reports and information, or from relying only on employee self-tracking. That's because accountability is the means for managers and executives to manage expectations and performance throughout the entire process.

This is the difference between looking at an employee's To Do list, versus seeing the impact of their actions. It's like looking at the game plan instead of watching the game. The game plan only tells you what should happen; the actual game is the only place you're going to see the team score.

Centralised reporting and dashboards provide this visibility, and not just to managers, but companywide. Accountability to executives is one thing, and it is expected, but accountability to your peers presents a different sort of pressure.

A lengthy shared report is great for those who need the details, but a dashboard provides a high level view into the business. Choose the important metrics to your business, things like leads, sales, shipments or customer service issues, and build a visual dashboard to get a picture of the business at a glance.

By fully tracking and measuring accountability, you can find where the ball is getting dropped in your process. It's not always at the hands of sales. It could have been fumbled in sales support, by management making the wrong call, or by an error in tracking or interpreting customer messages.

That's why you need to see the entire interaction of your team, specifically who is doing what and what the real results were. When you can pinpoint exactly what went right and what went wrong and where, that's how true accountability can happen.

Salespeople measure their output against expectations. This way, they see where they need to improve and when they need to grow. This takes some pressure off of managers so there's less reason to bully and harangue, a practice that does nothing to increase result–and often diminishes them.

Management can use accountability measures to ensure both good and great performance gets adequately rewarded, and that chronic underperforming individuals get culled in a fair and just way.

By establishing accountability, you also get a recorded history of customer engagement for future reference. This history also aids quick updates during staff changes.

If you can't measure what you're doing and predict your business as a salesperson, you're probably not going to be that successful.

Adam Farren
Director Sales & Revenue Operations
Huddler

Chapter 5

Collaboration

In every business, collaboration is essential to getting the work done. In small businesses, collaboration is even more important, because there are typically fewer people and fewer resources to do the work.

But when the collaboration is not coordinated and communication is not organised, things can get a bit chaotic. Fortunately, there are powerful tools that enable and track these interactions to help your team work smarter.

Many projects are driven by spreadsheets and timelines. But what if your employees had one place to keep and update these documents, and this place gave access to any employee who needed them?

Collaboration tools like this exist. They let teams work together in ways that make sense, not just those dictated by an org chart. Groups can come together by department or by project to make sure all conversations and documents are shared with the right people. It's easy to loop in anyone you need.

And if you have a few turf warriors and prickly personalities on staff who are counterproductive to the collaborative effort, these tools will help expose that too. That way, corrective measures can be taken quickly – hopefully before the work is compromised.

We deal a lot with partners: architects, contractors, building managers; and we need a way to track our relationships with those people.

Ben Gottesman
Applications Manager
DGA Security

Chapter 6

Customisation

Good news. For small businesses seeking solutions that work straight out-of-the-box, there are products that can have you off and running in no time. But since no two businesses run the same way, the better news is that customisation is possible with many programs.

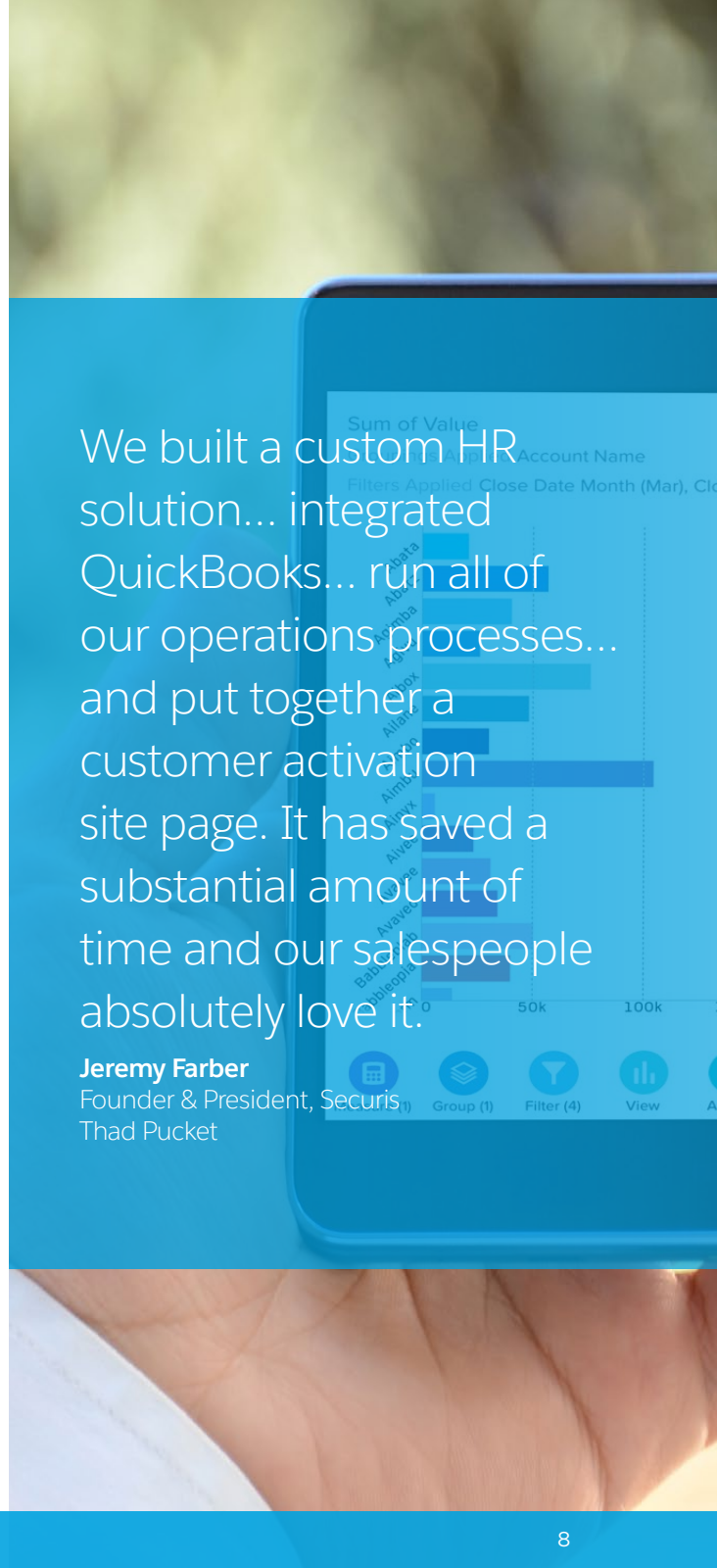
Customisation simply means that you can tweak the software to perform or present itself in ways that are meaningful to you.

In dashboards, customisation is the difference between clicking past a bunch of stuff you don't want to see in order to finally arrive at the information you do want - and having the important information displayed front and center, as soon as you sign on.

In performance, customisation allows you to make changes to the software to fit the way you do business. Too often, using out-of-the-box software as is means you have to change your processes to fit the software instead. Few businesses find this approach acceptable. Typically, a more efficient and profitable approach is to make the program serve you, rather than make your company serve it.

While some customisation can happen with almost any software, it's not always an easy task. It often requires hiring outside experts to handle the coding work. However, some solutions allow customisation directly within the application to make it a better fit for your needs. Look for programs that allows you to customise with the ease of a few clicks. Also, it should provide easy ways for power-users to customise it further.

Make sure you review and demo the customisation options with any vendor you're considering. Also, view online tutorials and videos wherever they're available for more insight into the process.



We built a custom HR solution... integrated QuickBooks... run all of our operations processes... and put together a customer activation site page. It has saved a substantial amount of time and our salespeople absolutely love it.

Jeremy Farber
Founder & President, Securis
Thad Pucket

Conclusion

Achieve sustainable growth

Sometimes a business will succeed on nothing more than luck – but that's not the best way to achieve sustainable growth. The surer path to success combines the right people, the right products or services, the right processes and the right technology to support them all.

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