

**System:** How to Create a System For a Task or Process

**Last Updated:** June 1, 2017

**System Administrator:** [email@organization.com](mailto:email@organization.com) (this is the person responsible for managing revisions to the system)

## How to Create a System For a Task or Process

### 1. Determine for what task you are creating a system.

You can do this by [taking inventory](#) or identifying something you or other members of the Javelina team do repetitively that it would create efficiency to have a system for.

### 2. Look for collaboration opportunities.

- a. Check the Javelina Systems Directory in the Javelina Operations Manual to see if a system already exists for this task. If it does, follow the steps and see if it works for you. If you have suggestions for improving the system, contact the listed administrator of the system.
- b. Send a message in the #general channel on Slack letting people know the task you plan to create a system for. Ask for anyone who also performs that task to collaborate with you.

### 3. Write down the steps.

- a. Think slowly through each individual step of the task, ONE AT A TIME, and write it down in your draft document.

### 4. Make sure every step has enough information.

- a. Go through each step and ensure you've provided enough information for someone to be able to do complete this task well.
  - i. Do these steps need to be done in a particular way?
  - ii. Does this system need to generate a particular outcome or result? How can this be measured? How can you build this into the system to ensure consistent results and quality over time?

### 5. Add List of Resources in bullet point format

- a. *Example:*

#### 11. Resources:

- [TEMPLATE Receipts\\_Javelina\\_2017](#)
- [Check the Master Account Database](#)

### 6. Add in efficiencies.

- a. Look at each step and determine whether it can be trashed, batched, automated or delegated.
  - i. Trash = You can get rid of this step by automating or eliminating it.
  - ii. Batch = This step can be done all at once at one designated time in your workday or workweek instead of continually throughout the day.
  - iii. Automate = This step can be automated by using a system or software.
  - iv. Delegate = You can delegate this step to another member of the team. If you're doing this, make sure you take the time to train them how to do it properly.
- b. For a written or audio step-by-step guide on this process, [click here](#).

### 7. Review your system.

- a. Do the one-step-at-a-time test for your system.
  - i. Are the first words of every step a clear instruction?



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- ii. Is additional information always provided in sub bullets?
  - b. Ask yourself - if Javelina was 10 times as big as it is, would this system still work?
    - i. If the answer is no, you have found a glitch in the system that will likely cause problems in the future.
    - ii. Use this to think of better or more sustainable ways to do things. It might be that you just flag the problematic step for special attention or review in the future.

#### **8. Proofread your system.**

- a. Check the naming convention: “How to create a system for a task or process\_Javelina\_06.01.2017”
- b. Check the header is updated accurately.
- c. Check for spelling, punctuation and grammar.
- d. Make sure page numbers are inserted.
- e. Is it formatted correctly all the way through with bold/italics/font/font size etc? (Check the template if you're not sure)

#### **9. Test your system.**

- a. Ask one or two appropriate colleagues (people who would use this system) to practice using your system the next time they do the task. Incorporate their feedback.

#### **10. Get your system approved.**

- a. Send to Operations Manager for feedback and approval.

#### **11. Add your system to the Javelina Operations Manual and Javelina Systems Directory**

- a. **Operations Manual:** Make sure you add to the correct folder
- b. **Javelina Systems List:** Change Status to Finalized and Next Update Date (Six months or one year from completed date)

#### **12. Resources:**

- [Taking inventory](#)
- Javelina Operations Manual
- Javelina Systems Directory
- Template Systems Document
- [Identify efficiencies within systems](#)

If you would like to read more about how to create systems, this [podcast series](#) is a great resource.

#### **13. Now read How to implement your system.**