



Operations Basics

Wisconsin SSBCI Program

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Registration:





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BOOKKEEPING &
CONSULTING

What's creating the
most stress in your
business right now?

THE REAL PROBLEM ISN'T WORKLOAD. IT'S HOW WORK GETS DONE.

Good operations create clarity before growth.

WHAT OWNERS THINK

- ✗  We need more staff
- ✗  We need more hours
- ✗  We need better employees
- ✗  We need less business



WHAT'S OFTEN ACTUALLY HAPPENING

-  Work isn't organized
-  Expectations aren't documented
-  Information is trapped in people's heads
-  Processes vary every time
-  Inconsistent results, frustrated team, stressed owner

BREAK THE CYCLE.
BUILD A BUSINESS
THAT WORKS WITHOUT YOU.

 
WHAT'S WASTING TIME?
Eliminate friction
and busywork.

 **SIMPLIFY**
WHAT CAN BE
MADE EASIER?
Make it clear and
easy to follow.

 **SYSTEMIZE**
WHAT SHOULD BECOME
A DOCUMENTED PROCESS?
Document, create
consistency, and train.

 **MORE CLARITY.
LESS CHAOS.
BETTER RESULTS.
MORE FREEDOM.**

 **CLARITY TODAY. CONSISTENCY ALWAYS. GROWTH BY DESIGN.**

If you could solve One
operational frustration today,
which would have the biggest
impact?

REACTIVE vs. OPERATIONALLY HEALTHY

TWO VERY DIFFERENT BUSINESSES

REACTIVE BUSINESS

Always putting out fires.



Solving today's problems



Constant interruptions

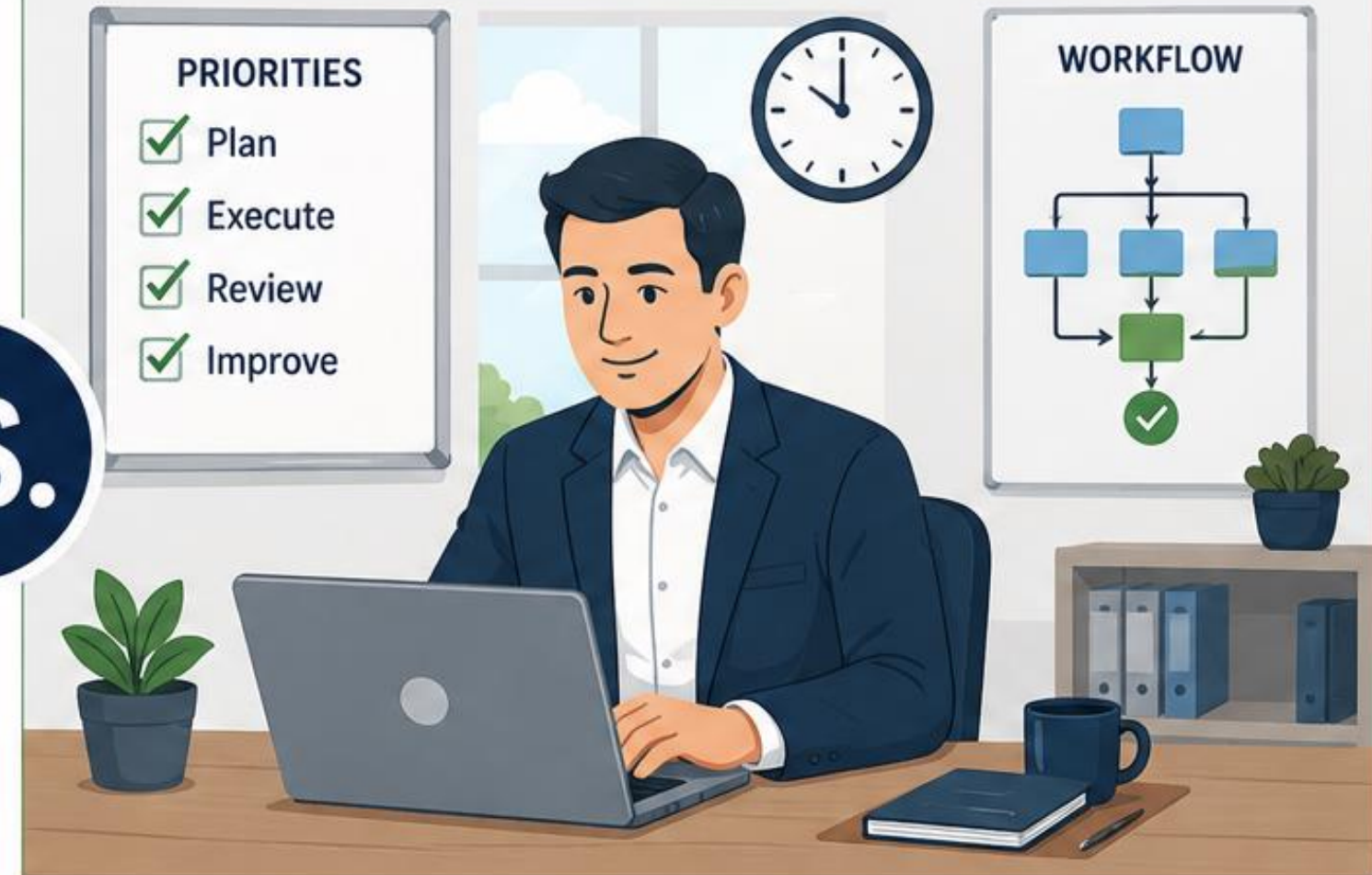


Last-minute decisions

VS.

OPERATIONALLY HEALTHY BUSINESS

Running the business, not just reacting.



Planned priorities



Clear workflows



Fewer surprises

➤ STRONG OPERATIONS. LESS CHAOS. MORE FREEDOM. ➤

Good operations create clarity before growth.



SIGNS YOUR OPERATIONS NEED ATTENTION

- ✓ Things regularly fall through the cracks
- ✓ You answer the same questions over and over
- ✓ Work gets done differently each time
- ✓ Team members wait for direction
- ✓ Important information lives in people's heads
- ✓ Taking time off feels impossible



INDICATORS TO WATCH



Employees come to you for answers



You approve every decision



Progress slows when you're unavailable



You are the backup plan for everything



**SYSTEMS CREATE FREEDOM.
FREEDOM DRIVES GROWTH.**

THINGS FALL THROUGH THE CRACKS

When important things are missed, everyone pays the price.



Missed deadlines



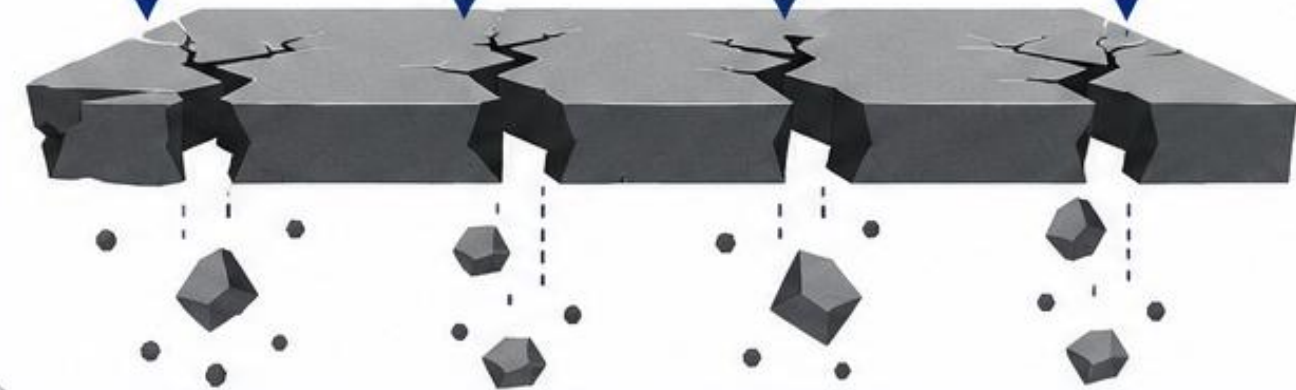
Forgotten follow-ups



Unfinished projects



Customer requests slipping through



COMMON CAUSES



No task tracking system

Tasks live in inboxes, sticky notes, or people's heads.



Unclear ownership

No one knows who is responsible, so things get overlooked.



Lack of follow-up processes

Nothing ensures things get followed up and completed.

THE COST OF OWNER DEPENDENCY



- ✗ Team members ask the same questions
- ✗ Customers receive inconsistent experiences
- ✗ Mistakes happen repeatedly
- ✗ Training takes longer than it should
- ✗ Growth is limited by your time and availability



The more your business depends on you, the more it limits your growth and freedom.



STRONG OPERATIONS DON'T HAPPEN BY ACCIDENT. THEY HAPPEN BY DESIGN.

How many of these warning
signs exist in your business
today?

What Happens When These Issues Go Unaddressed?

Operational challenges don't just create stress. They cost time, money, opportunities, and growth.

OPERATIONAL CHAOS COSTS MORE THAN YOU THINK.

Good operations create **clarity**. Clarity drives **results**. Results create **freedom**.

THE HIDDEN COSTS OF CHAOS



THINGS FALL THROUGH THE CRACKS



THE SOLUTION: STRONG OPERATIONS



 **WHEN YOU BUILD STRONG OPERATIONS,
YOU BUILD A BUSINESS THAT WORKS—WITHOUT YOU.**


MORE TIME


LESS STRESS


MORE PROFIT


MORE FREEDOM

*Which cost has the biggest
impact on your business today?*

THE 4 SYSTEMS EVERY BUSINESS NEEDS

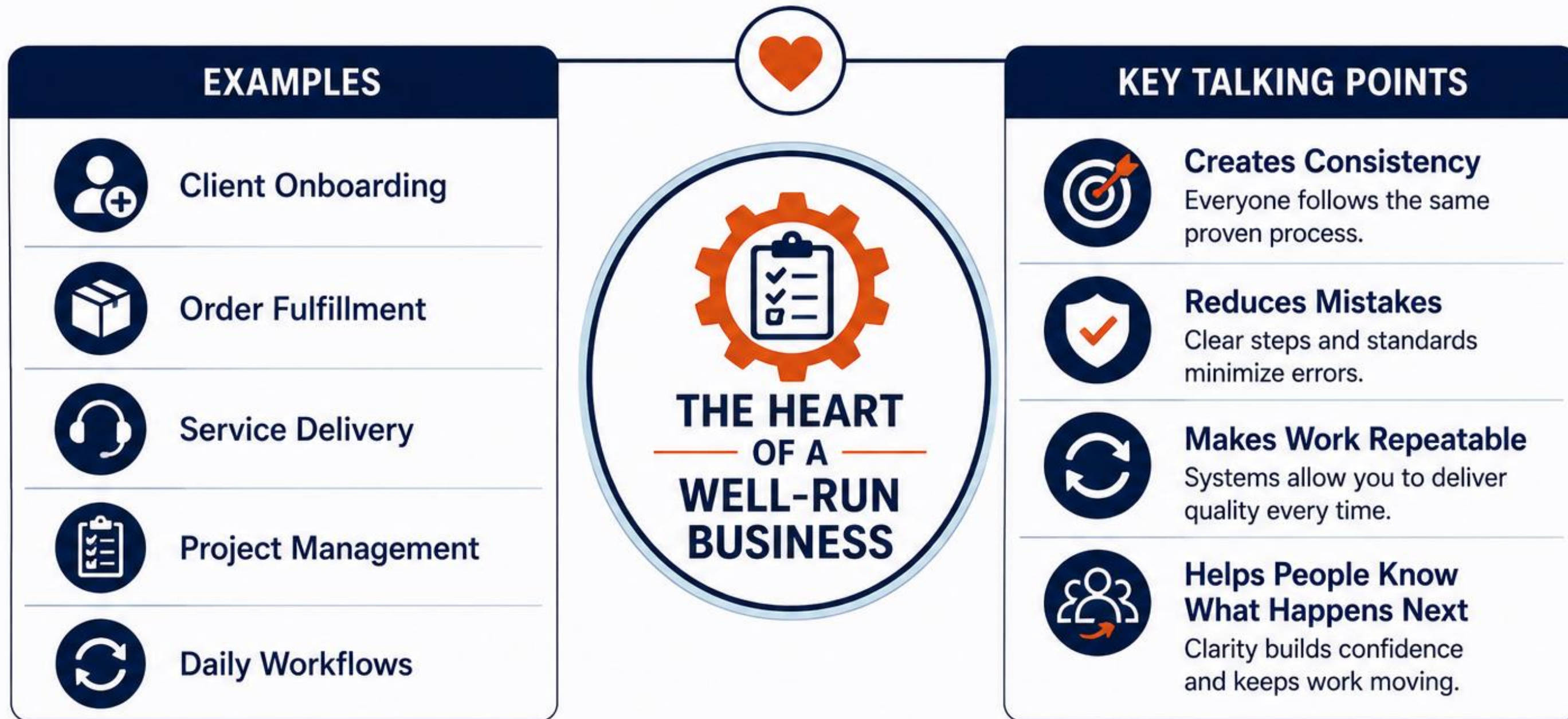
Strong systems create clarity, consistency, and capacity to grow.



When **OPERATIONS**, **PEOPLE**, **SALES**, and **FINANCIAL** SYSTEMS work together, your business becomes easier to manage, easier to grow, and less dependent on the owner.

THE OPERATIONS SYSTEM

IS HOW WORK GETS DONE.



**A STRONG OPERATIONS SYSTEM CREATES CLARITY, FREES UP TIME,
AND BUILDS THE CAPACITY TO GROW.**



Document the process. Train the team. Follow the system. Improve it continuously.

A TASK MANAGEMENT SYSTEM ENSURES IMPORTANT WORK **DOESN'T DEPEND ON MEMORY.**

INSTEAD OF:

-   **STICKY NOTES**
-   **TEXT MESSAGES**
-   **"I'LL REMEMBER LATER"**



USE:

-   **TASK LISTS**
-   **SHARED PROJECT BOARDS**
-   **ASSIGNED RESPONSIBILITIES**
-   **DUE DATES**



CAPTURE IT. ASSIGN IT. TRACK IT. GET IT DONE.

Your business runs better when important work is managed, not remembered.



WHAT EVERY TASK NEEDS

EVERY TASK SHOULD ANSWER **THREE QUESTIONS**

1



**WHO
OWNS IT?**

Every task needs
a clear owner.

2



**WHEN
IS IT DUE?**

Every task needs
a target date.

3



**WHAT DOES
DONE LOOK LIKE?**

Every task needs a
clear definition of "done."



Clear ownership. Clear deadlines. Clear expectations.

That's how work gets done.



Task Management Tools

The Best Tool Is the One You Actually Use

Simple: Written checklist, Shared spreadsheet, Phone Notes, Google Tasks

Moderate: Microsoft Planner, Trello

Advanced: Asana, ClickUp, Monday.com

The Goal is Visibility!!

*Where are most of your tasks
currently tracked?*

TASK MANAGEMENT + COMMUNICATION

Working Together. Keeping Everyone in the Loop.

When tasks are clear, communication is better.
When communication is clear, tasks get done.



TASK MANAGEMENT

Creates Clarity

-  Defines what needs to be done
-  Assigns the right person
-  Sets due dates and priorities
-  Tracks progress to completion

Clear tasks reduce confusion and missed work.





COMMUNICATION

Creates Alignment

-  Shares updates and changes
-  Asks questions and gets answers
-  Keeps everyone informed
-  Reinforces accountability

Clear communication builds trust and keeps work moving.



TASK MANAGEMENT
+
COMMUNICATION

=



FEWER MISSED TASKS
LESS REWORK



STRONGER TEAM
MORE ACCOUNTABILITY



BETTER RESULTS
MORE TIME TO GROW

Good systems start the work. Good communication keeps it moving.

COMMON COMMUNICATION CHALLENGES

SIGNS YOUR COMMUNICATION SYSTEM NEEDS ATTENTION



CLEAR COMMUNICATION ISN'T JUST NICE TO HAVE— *it's essential.*



ALIGNS YOUR TEAM



PREVENTS MISSED WORK



DRIVES BETTER RESULTS

Create Communication Lanes

Not Every Conversation Belongs Everywhere

Example Framework	
Type of Information	Where It Goes
Daily updates	Team chat
Project work	Task management system
Procedures	SOPs/process documents
Client information	CRM or client file
Company announcements	Team meetings

THE POWER OF REGULAR CHECK-INS

CONSISTENCY **BEATS** CONSTANT COMMUNICATION



WEEKLY TEAM MEETING



Priorities



Roadblocks



Updates



Upcoming deadlines



MONTHLY OPERATIONS REVIEW



What's working?



What's slowing us down?



What needs improvement?



Most teams need **fewer meetings** and more
predictable communication.



*Which communication challenge
creates the most frustration in your
business?*

EVEN GREAT COMMUNICATION WON'T CREATE CONSISTENCY WITHOUT **PROCESSES**

Three essentials. One strong business.



TASKS

tell us
what needs
to be done.



COMMUNICATION

tells us
what people
need to know.



PROCESSES

tell us
how the work
gets done.



When **tasks**, **communication**, and **processes** work together,
consistency happens—and results follow.

PROCESS SYSTEM

How Work Gets Done Consistently

A process system creates **consistency** so work can be completed the same way, regardless of who is doing it.

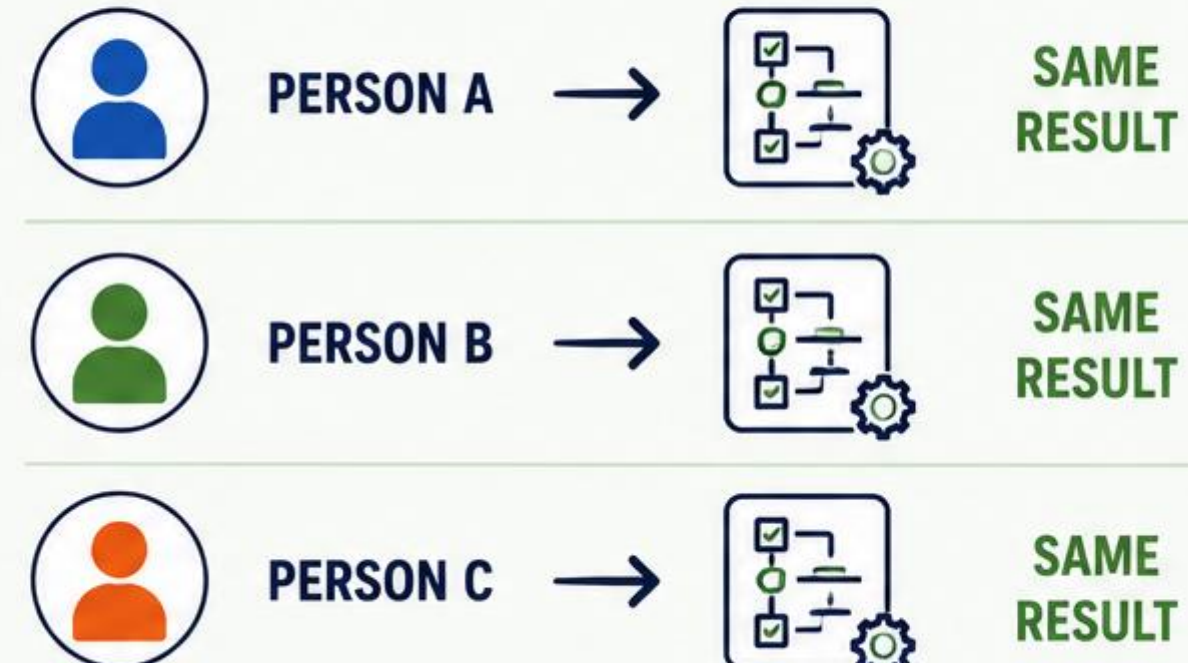
WITHOUT A PROCESS



✗ Inconsistent results. More rework. More frustration. Harder to grow.

VS.

WITH A PROCESS



✓ Consistent results. Less rework. More confidence. Easier to grow.



A process system **removes the guesswork** and creates repeatable, reliable results—*every time*.

WHAT IS A PROCESS?

A PROCESS IS SIMPLY **A REPEATABLE SERIES OF STEPS.**

THE PROCESS FORMULA

TRIGGER



The event or situation that *starts* the process.

STEPS



The *repeatable actions* taken in the *right order*.

OUTCOME



The *expected result* when the process is completed.



Follow the process. Get the outcome. *Every time.*

PROCESS EXAMPLE

CLIENT ONBOARDING PROCESS



A clear process creates a consistent experience and better results—**every time.**

THE PROCESS TEST



Could someone else successfully complete this task **without** me?

IF THE ANSWER IS **NO:**

YOU PROBABLY NEED:



BETTER DOCUMENTATION

Write it down so others can follow it.



CLEARER INSTRUCTIONS

Make the steps easy to understand and follow.



A DEFINED PROCESS

Create a repeatable system that gets consistent results.

WHY OWNERS AVOID DOCUMENTING PROCESSES

THE MOST COMMON OBJECTIONS



OBJECTION #1

“I don’t have time.”

✓ **REALITY**

You are already spending time explaining it repeatedly.



OBJECTION #2

“It changes too often.”

✓ **REALITY**

Most core processes are more stable than we think.



OBJECTION #3

“It’s all in my head.”

✓ **REALITY**

That’s exactly why it needs to be documented.



Documenting your processes **saves time**, **reduces mistakes**, and **builds a business** that can run without you.

If you could document One
process this month, what should it
be?

PROCESS DOCUMENTATION DOESN'T HAVE TO BE COMPLICATED

DOCUMENT **20%** TO GET **80%** OF THE BENEFIT

PERFECTION



40-PAGE SOP



Hard to create. Hard to maintain.
Hard to use.

... VS. ...

PROGRESS



SIMPLE CHECKLIST
WITH KEY STEPS



Easy to create. Easy to update.
Easy to use.



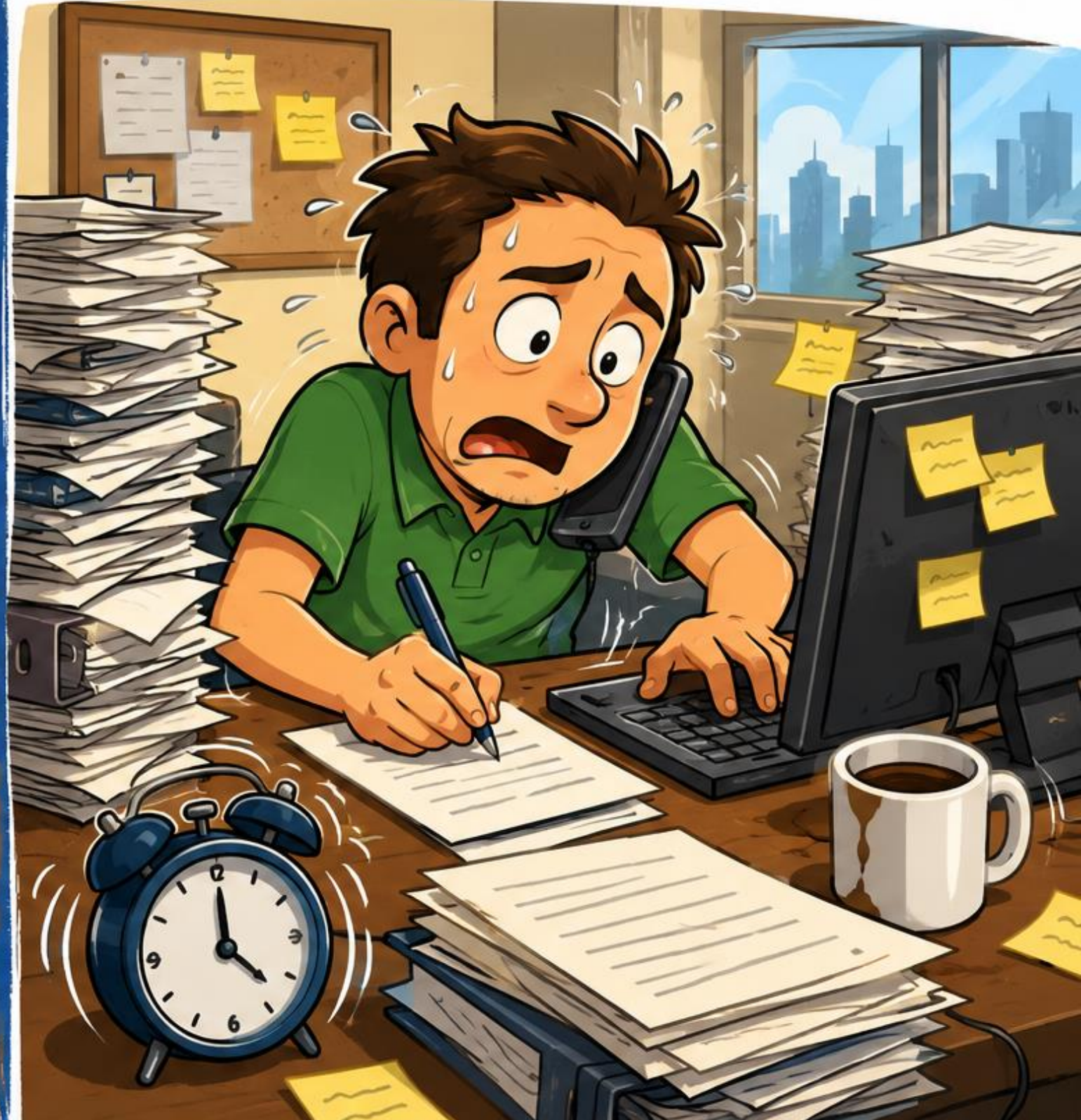
Focus on **clarity**, not **complexity**.

Done is better than perfect.

WORKING ON THE BUSINESS

VS.

WORKING IN THE BUSINESS



THE OPERATIONS *TRAP*

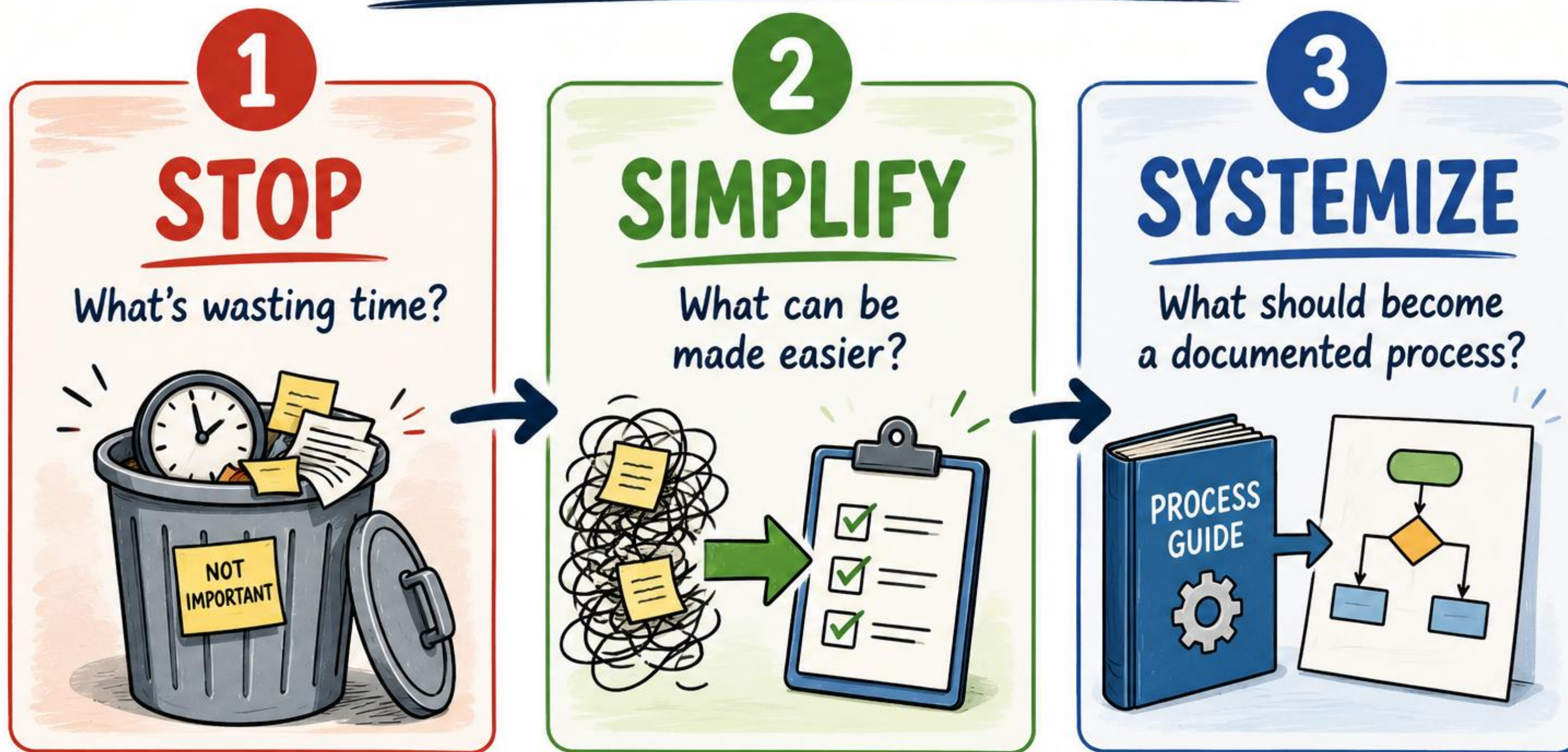


**THE BUSIER
WE BECOME,
THE MORE
IMPORTANT IT IS
TO CREATE TIME
FOR IMPROVEMENT.**

IMPROVEMENT DOESN'T HAVE TO BE COMPLICATED



OPERATIONS REVIEW FRAMEWORK



Focus on progress, not perfection. | Small changes. Big impact.

Ask Chat, Operations Review:

Act as an experienced operations consultant for a small business.

Help me conduct a Weekly Operations Review.

Ask me questions one at a time and wait for my response before moving to the next question.

Your goal is to help me identify:

Bottlenecks slowing down the business

Repeated questions or issues

Tasks that are falling through the cracks

Processes that need documentation

Areas where communication could improve

Opportunities to save time or improve efficiency

After gathering information, provide:

A summary of the biggest operational challenges.

The top three areas that need attention.

One quick win I can implement this week.

One process I should document.

One system or workflow improvement to focus on this month.

A simple action plan with clear next steps.

Keep recommendations practical, realistic, and appropriate for a small business with limited time and resources.

Ask Chat, Action Planning:

Act as my small business operations advisor.

Based on the following operational challenge:

[Describe the challenge]

Help me create a simple action plan.

Provide:

The root cause of the issue

The likely impact if it is not addressed

The first three actions I should take

Any process that should be documented

Any communication improvements that may help

A realistic timeline for implementation

A simple way to measure success

Keep the plan practical and achievable for a small business owner.

Key Takeaways:

1. Overwhelm is often a systems problem, not a workload problem.

If everything depends on you, the business becomes harder to manage and grow.

2. Strong operations create consistency.

The goal is not perfection. The goal is repeatable results.

3. Every business needs three core systems.

- Operations
- People
- Financial

4. Tasks, communication, and processes must be clear.

People perform better when expectations and workflows are defined.

5. Document the 20% that gets you 80% of the benefit.

Start with the major steps. You can add detail later.

6. Work on the business regularly.

Set aside time each week to identify one bottleneck and make one improvement.

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