Work the System

Sam Carpenter—2014.

Pre-face to the first edition: it's just mechanics.

- Yes, others voicemail messages, and God only knows how many email messages, attest to his status and importance, but in the bigger picture he is a slave to his job— and the people who depend on him are slaves to his presence.
- They way for his response and can't move ahead until he provides input. In his absence, because he fails to set up business processes that keep producing while he is gone, things come to a standstill in the same way water accumulates behind the dam.

Part one: the system's mindset.

Chapter 2: events did not unfold as anticipated.

- The reason for the turnaround was the discovery and application of the principle that leadership must focus on improving processes, not on performing the work or on repeatedly snuffing out brushfires.
- Quality products or services, a staple staff, and profitability are the results of the quality systems that underline them, not the reverse.

Chapter 4: gun to the head enlightenment.

- It was simple logic. Creating efficient subsystems should cause the primary system to be efficient to. And to take this a step further, it seemed to me that if the individual subsystems could be made more efficient, if they were able to be made potent and powerful, that my primary systems— my business and my life— would become potent and powerful to.
- I just needed to identify individual processes and then optimize them one by one. The primary system would be superefficient, the end product of the superefficient subsystems that would compose it.
- I would no longer deal with the bad outcomes of inefficient systems. Instead, I would expand my energies on perfecting those systems— and good outcomes would come along naturally.
- Creating the highest quality telephone answering service in the United States in five steps:
  - We would exactly define overall direction and strategies. It would be done on paper by creating the Strategic Objective and the General Operating Principles documents.
  - We would break down Centratel's workings into subsystems we could understand: processing calls, staff management, client services, equipment, quality assurance, the protocol for handling client and customer requests, bookkeeping, purchasing, customer services, etc. Then, each of those subsystems would be broken down into even smaller contributions subsystems, including receivables software, customer complaint protocol, employee recruitment, equipment maintenance schedules and so on.
  - Once isolated, exposed and understood, we would refine and improve those systems— one by one— so each would contribute 100% toward the stated goals of the strategic objective. As needed, we would create new systems from scratch. We would discard

useless ones. We would document each process into a working procedure, thus making the perfected system permanent. The execution of the perfected system would recur without prompting: perfect systems executing perfectly 100% of the time, automatically.

- o We would implement failsafe, reoccurring maintenance schedules.
- o "Replacements" would be identified and trained. Every employee, including me, would have someone in the wings who could instantly take over should that become necessary.

Chapter 6: systems revealed, systems managed.

- "A person needs new experiences. They jar something deep inside, allowing him to grow. Without change, something sleeps inside us, and seldom awakens. The sleeper must awake!" - Duke Leto Atreides.
- The improvement of the system is a system improvement, and the documentation of that improvement is a working procedure.
- How one goes about cultivating good relationships is also a system, and the methodology must be set up with care and executed with consistency. For thoughtless people, the base problem is not usually a personality flaw but the lack of a functional relationship maintenance system.

Chapter 7: getting it.

- The first step: make your systems visible. You know this by now. First make the various systems concisely visible. Second, one at a time, remember to the foreground for examination. Third, adjust them. Fourth, document them. Fifth, maintain them.
- If you want to see where you fit in the machine that is your life, you must observe it from an exterior vantage point. You must stand outside of it if you are to see how you are part of it.

Part two: make it so.

Chapter 9: we are project engineers.

- However, for people in the grip of chaos, these important wheel greasing chores are the first casualties. And so many life situations that include careers, marriages, friendships, mechanical devices, play, homes, health—all of it—the necessary routine maintenance is skipped because of fire killing, simple laziness, and especially ignorance of the way linear systems execute in the real, mechanical world.

Chapter 10: your strategic objective and general operating principles.

- A collection of foundational guidelines for making decisions. In the end, it included 30 separate operating principles so we named it simply "30 principles."
- Your operating principles are guidelines for decision-making for your business or your job. It's helpful to make up a set for your personal life, too.
- If one digs a bit, it becomes clear why we have problems finding job applicants – and the good fortune of having high staff stability. It's our drug testing policy, as posted in the employee handbook. Before we institute drug testing, we had plenty of job applicants, but there was high staff turnover.

Chapter 11: your working procedures.

- The difference between a large successful business and a small struggling one? Documentation. The former has it, the latter doesn't.
- Go to www.businessdocumentationsoftware.com .
- Key point number two for designing, producing and executing reoccurring procedures is to use the best solution every single time the process occurs.
- It's a numbers game and the opponent is randomness.
- Documenting is not limited to just the obvious problem protocols. It applies to all internal systems. Documenting as seemingly flawless system will often reveal small defects.
- Key point number four is to create your working procedure documents for anyone "off the street."
- This is inevitable: I promise you that at first it will seem you don't have the spare time to work through the Working Procedures process. Though this is wrongheaded because if you think creating procedures is a spare time task, the process will take a backseat to the crisis du jour. Procedure documentation must go to the very top of your priority list or the effort will be derailed in a week or two.
- Again, it is the leader's job to make sure staff members have exact guidelines for each task they perform. Then it is the employee's job to follow the instructions precisely, yet assertively offer suggestions for improvement.
- However, in order to qualify for the bonus, each month a TSR must submit at least 12 recommendations for improvement to the main customer information database – the same one they use to process client calls. This database of our 1000 clients is massive, and errors or less than perfect descriptions/instructions can occur due to the sheer immensity of information. This anonymous information sources consistently utilized by TSRs, therefore making them the best source of recommendations for system improvement. TSR submissions may be as minor as a missing, or as large as a recommendation for a new message relay protocol. Via email, each suggested revision is submitted to a supervisor. The supervisor examines the suggestion, and if it's viable, instantly makes the database revision. This is how we keep the information system that is at the heart of our operation superbly accurate: by paying our people to aggressively search out flaws.
- Will I'll reiterate this here: you are not documenting processes and then filing away the documents. In real time you are creating and modifying exact step-by-step instructions for completing everyday tasks.

Part three: so say we all.

Chapter 21: system improvements as a way of life.

- A summary of the work the system methodology.
    1. It starts with your change in perspective, the aha! Insight arriving in a moment of time. Deep down, you permanently internalize your new vision. You see each life event as the product of the mechanism that engendered it, the one – two – three – four process that preceded it, not as an isolated happening, a product of luck, fate, karma the stars or the benevolence or raft of someone else. When the insight arrives, the next mechanical moves are obvious.

2. You establish your goals and strategy through the creation of the Strategic Objective and General Operating Principles. You do this to establish firm direction and so there is continuity.
3. You examine the mechanics of the subsystems that make up your business, job, health and relationships. You analyze them one by one, looking for opportunities for enhancement. Sometimes you add new ones. Sometimes you discard useless ones.
4. You make revisions, moving each subsystem to peak efficiency. If you are in a business or job environment, for permanence you carefully create Working Procedures to describe the protocols. You and your staff create this documentation from scratch. Then, when you're done, your team intensively coddles your system and the documentation, always tweaking to perfection. From now on you and your people spend the majority of time in system improvement.
5. A calm, and positive comportment evolves naturally because you have developed solid faith in the reliability of the systems that are at work everywhere. It's comforting. You are powerful and serene because you have successfully harnessed your systems, directing them to do what you want them to do. With subsystems isolated, perfected and then combined together again, you preside over stunningly efficient primary systems – your business, job, relationships… You. At the gut level, without putting your head in the sand regarding the many situations in this world that are not ideal, you grasp the real truth that 99.9% of everything works fine.