

Scale Up Your Business with

Cloud Technology



Workspaces

By Martin McNicoll

How Do You Handle Rogue Applications?

- Can you name some aspects of your business where you suspect rogue applications may exist?

- What does your IT department work on today that only keeps the boat afloat, and nothing more?

- Without any changes to your processes, if there were a seismic shift in your business tomorrow, perhaps the result of scaling, what would break first, then next, then next? List the top 5.

1. _____
2. _____
3. _____
4. _____
5. _____

Scaling Up Self-Check

- What are your scaling up goals? What are your end objectives, and how do you believe you need to scale up to get there?

- What factors accelerate or decelerate your timeline for scaling up?

- What customer feedback have you received that might point out competitive disadvantages?

Scaling Up Self-Check

- On a scale of 1 to 10, how quickly have you been able to modernize in line with changes/developments/advancements in your industry? List a few examples.
- How would you rate your performance on Google? What search word combinations/ behaviors lead us to your website versus the combinations you want?
- In what different ways are competitors passing you by? List a few.

The Wellness Wheel: How do You Measure Up?

Execution System

I have a state-of-the-art execution system that is integrated with the financial functions of my organization. I can see details relating to specific or general project/production profitability (i.e., professional services automation, production/manufacturing, warehouse management system.)

Score:

Financial Controls

My system allows me to record financial information and automatically bill based on milestones, on hours, or both. I can easily approve expenses or hours for projects and tasks.

Score:

Growth

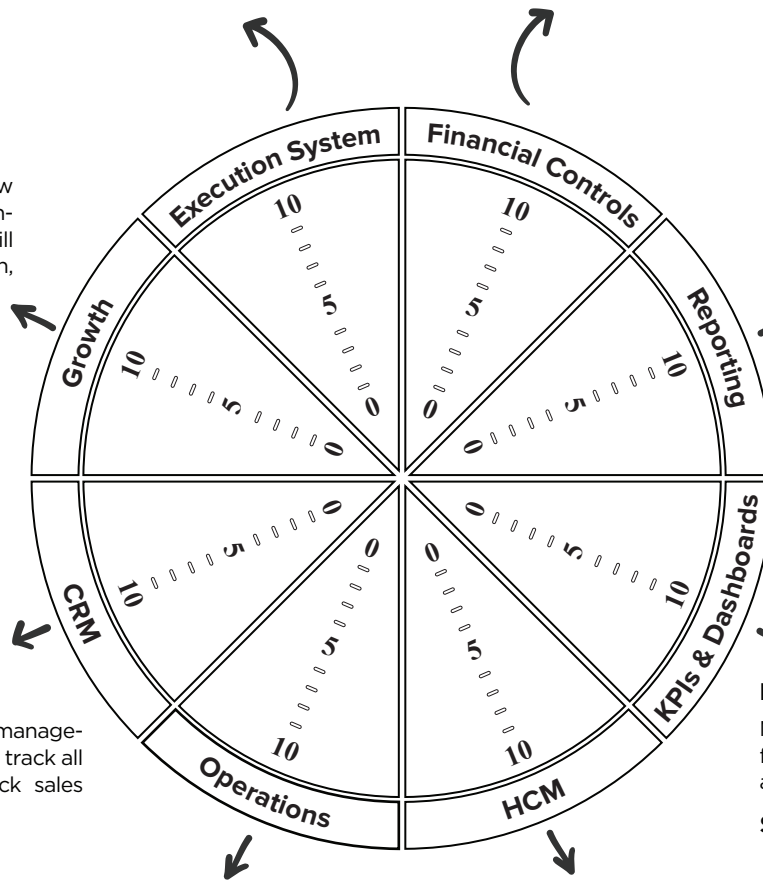
My system allows me to grow my business and adapt to changing conditions. The system will easily scale with my growth, since it's easy to customize.

Score:

Reporting

I have the ability to get to the information I need quickly and easily. I have the ability to create or change reports as required.

Score:



CRM

I have a customer relationship management system that allows me to track all customer information and track sales progress.

Score:

KPIs & Dashboards

My system tells me, in a dashboard format, where my business stands and where it's going.

Score:

Operations

I consume my operating systems as a service (email, phone, videoconferencing, backup, IT support) so that I can focus on my core business while getting the best industry tools available.

Score:

Human Capital Management (HCM)

I have a Human Resources Information System (HRIS). It is shared with all stakeholders and gives me metrics on recruiting and retention activities in real-time.

Score:

- On a scale of 1 (poor) to 10 (optimum), mark your current system health in each of these essential areas.

Decision Matrix and Standard Operating Procedures

In his excellent book *The 40-Hour Work Year*, Scott Fritz presents a matrix to help decision-makers align by type of decision, as a quicker way to decision-making, and ultimately, to scaling up. We have created a similar Decision Matrix to assist you.

Fill in the sample matrix for your company below. What do you notice?

Decision Matrix Corporate Approval Methods

Item	Approval By	Owner	CEO	COO	Dept. Head
Changes in Benefit Plans					
Bonus Plans					
Business Acquisition					
Defending Lawsuit					
Negotiate Contracts					
Terminate Contracts					
Approve Purchase over \$Xk					
Approve Purchase under \$Yk					
Terminate Employee					
Approve New Hire					
Approve Promotion					
Approve Item over Budget					
Approve Quotes to Prospect					

Standard Operating Procedures

Below is a list of common Standard Operating Procedures. Add to the list any SOPs that are specific to your business. Which of your processes are tied to specific people and not positions? Can you identify the ones that scale and the ones that don't?

Sample Standard Operating Procedures

1. Operations (revenue engine)

- Marketing Playbook: Brand guide, trade shows and events, website, social media, telemarketing.
- Sales Playbook: Sales mission, roles and responsibilities, sales territories, sales team lead assignment, sales process and stage description, CRM how-to, forecasting, sales planning, lead generation, inbound lead process, training material.
- Operations (consulting/production/distribution)
 - a) Your secret sauce: Delivery methodology, production guide.
 - b) Knowledge and innovation management: Processes to capture your knowledge and innovations.

2. Administration and Logistics

- a) Information Systems: Documents all of your internal systems and how to manage them, including your support process.
- b) Accounting: daily, weekly, monthly, quarterly, annual calendar planning. Includes month any year-end, budget tracking, invoicing, collection banking, tax.
- c) Finance: R&D credits, investor relations, M&A.
- d) HR: Recruiting, end-of-employment process, training, employee medical insurance, employee policies, payroll, performance evaluation, salary review, promotions, recognition.
- e) Legal: Contract review process.
- f) Physical Premises: Lease, security, reception, cleaning, cafeteria

3. Leadership

- a) Strategic planning: One-page plan.
- b) Executive: Standard agendas for daily huddles, weekly one-on-one and executive meetings.
- c) Staff communication.

What are your growth goals? How ready are you?

How good are you at change management? Answer the following questions.

- When you implement change, how do you let various departments deal with the impacts?

- What aspects of your company's values and culture influence how you manage change?

- How do you seek support from executives when something is changing?

- Do you use different strategies when dealing with non-executives? Elaborate.

Map Your Systems

- What are your Systems of Record?
- What are your Systems of Differentiation?
- What are your Systems of Innovation?

How Scalable is Your Existing Stack?

- Draw you stack. Make an honest and accurate representation of what you have in place today.

KPI's and consolidation

Sales

Execution Systems
(Business Units)

People

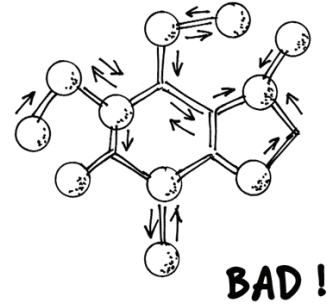
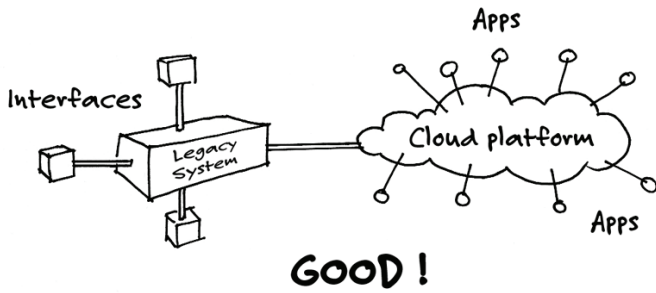
Accounting

All other apps
(Rogue)

Operations (Tools)

Draw Your Ecosystem

When you look at an ecosystem that's well-designed, it looks somewhat like the Sun. With two-tier ERP, it's more of a twinstar system. But when it starts to resemble a series of molecules... you're in trouble!



What does your omni-channel strategy look like today? Draw your ecosystem to see if it's in step with emerging trends.

