



Turning Your American Dream into Reality





The Great American Small Business Challenge™ The Official Handbook

By: Michael Kramer

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Please visit: www.tgasbc.org

YOUR CHALLENGE

The Great American Small Business Challenge is a national business competition that's designed to help you master the essential leadership skills you need to minimize your company's growing-pains and maximize its success. The Challenge does this by helping you establish an effective Business-Development-Process that you can use to get very organized, set realistic goals, implement best-practices and create a scalable, sustainable ~ *and even salable* ~ company.

The goal of the Challenge is to help you:

- **Identify A Vision For The Future:** Clarify what you are creating and articulate what success looks like for you.
- **Create Objectives:** Determine what efforts and actions you need to take to accomplish your goals.
- **Plan Strategies:** Create an action plan that outlines how you will meet your goals.
- **Track Your Success:** Identify the key indicators that will help you measure whether your goals have been reached.
- **Document Processes:** Identify how each part of your business works.
- **Develop a System:** Create a coordinated and organized way in which each part of your business can effectively work together to accomplish your goals.
- **Create Roles and Procedures:** Decide who is responsible for performing work and how work is to be carried out.
- **Continuously Improve:** Adapt processes and systems to achieve better results.
- **Document Know-How:** Keep a record of the (technical) knowledge and skill required to perform a role or procedure.
- **Identify Best Practices:** Discover the most efficient (least amount of effort) and effective (best results) way to accomplish a task.
- **Develop Professionally:** Utilize the tools, training, people and resources at your disposal to enhance your skills.
- **Innovate:** Create opportunities to deliver more value to customers.
- **Develop Core Competencies:** Develop the skills and expertise that allows you to outperform and outshine your competition.

Bottom line: The Great American Small Business Challenge is designed to help you work less, make more money and finally enjoy building a successful company.

BEST-PRACTICES

The Great American Small Business Challenge is a best-practices approach. It is as relevant for a retail or service business as it is for a manufacturing or distribution company.

The Challenge is consistent with best-practice methodologies like the Malcolm Baldrige Award, Six-Sigma, ISO, TQM, Lean, Kaizen and the Toyota Quality Method. Yet it is appropriately weighted for smaller companies.

We believe that for far too long best-practices have been out of the reach of smaller businesses. The Challenge has been created to change that. Now, best-practices will be accessible to all companies regardless of their industry, size or stage of development.

PRESCRIPTIVE

The Great American Small Business Challenge is a prescriptive approach. This means that all participants use the same software and step-by-step implementation methods. This benefits you in the following ways:

- First, and most important, the heavy lifting is done for you. The Challenge offers you a ready-made and ready-to-implement business-development framework. All you need to do is customize the framework for your business.
- Second, using the same business-development tools helps create a community of small business owners who share a common experience and speak a common business-development language.

As you progress in the Challenge we hope to offer you many opportunities to leverage the Challenge Community so you can help each other succeed. For example, imagine joining a mastermind group with other Challenge participants or attending a conference featuring industry experts who can help you leverage the Challenge methodology.

- Third, using the same tools makes your development process measurable so you can assess your progress relative to other participants.

FOUR STEPS & FOUR AWARDS

Businesses who participate in the Challenge are competing against themselves and not each other. This means that you and your fellow participants have an equal opportunity to win awards.

You earn an award (Bronze, Silver, Gold and Platinum) every time you achieve a specific milestone in your business development process. These milestones (and awards) correspond to the following four steps:

Step one: Setup your organization's business model (Bronze)


Use supplied business-development software to:

- Create your company's organizational chart consisting of departments, job-roles and people.
- Create a basic strategic plan consisting of a vision/mission statement and a set of general objectives related to departments, roles and people.

Step two: Create your company's management system (Silver)

Use supplied business-development software to:

- Develop your company's comprehensive Strategic Plan consisting of specific objectives and a series of projects designed to achieve your objectives in the time-frame you specify.
- Create your company's "Book of Knowledge" (BOK). Your BOK should include the policies, procedures, training materials and forms related to performing every operational role.



Step three: Use your company's management system to grow (Gold)

Use supplied business development software to:

- Actively implement your strategic plan.
- Perfect your “Book of Knowledge” (BOK) until you achieve the following milestones:
 - Operations are scalable. This means your company is prepared to grow quickly while maintaining quality and service levels.
 - Roles are easily delegable. This means roles are not dependent on specific employees but on strong systems.
 - Employees are free from their “job traps” and can be easily promoted.
- Manage meetings (Using the **Department Profile Page**)
- Manage continual improvement (Using the **Role Profile Page**)
- Manage employees (Using the **Employee Profile Page**) *if applicable*

Step four: Achieve performance excellence! (Platinum)

Having successfully completed steps one through three your business should now have the operational and leadership infrastructure it needs to achieve the results you want including:

- Reduced stress and aggravation
- More time off
- Improved quality and consistency of products and services
- Increased customer satisfaction
- Increased employee satisfaction, fulfillment, engagement, etc.
- Increased profitability (lean operations + growth)
- Increased innovation
- Increased business value (because it is scalable and saleable)
- Prepared for franchise or rapid growth
- Reduced stress and aggravation
- Flexible, responsive, agile, etc.

ELIGIBILITY

The Great American Small Business Challenge is open to any small business that wishes to take a more systematic approach in managing their day-to-day operations.

We have purposefully decided not to define “Small Business.” We don’t want to prevent anyone from participating because of arbitrary cutoffs.

If your business does not qualify for training and support through a local participating College, University, Entrepreneurship Program, Small Business Development Center, or consulting firm, you can access free, online training and support provided directly by the GASBC.



COMPETE AT YOUR OWN PACE

You compete at your own pace. This means if you want to be aggressive you can substantially complete the Challenge in just a matter of months. Or, if you want to take more time, you can take a year or more. It's up to you! However, please keep in mind, that to remain in the Challenge you must make steady progress and meet your commitments to your GASBC Counselor.

Expect to spend about three to five hours each week on Challenge related activities and assignments.

FREE SOFTWARE

All Great American Small Business Challenge participants receive

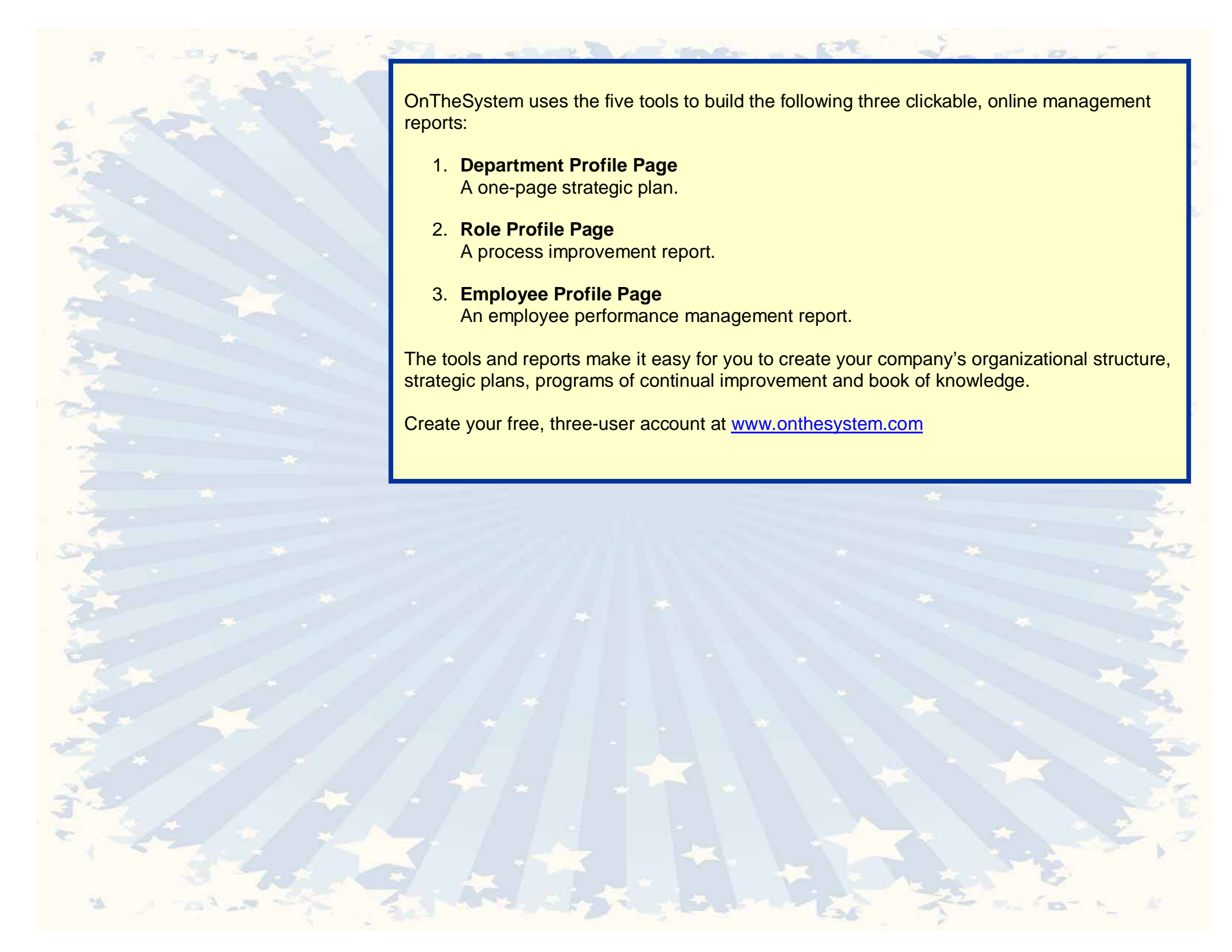
free access to a 3-user version of OnTheSystem *Business Development Software*.

The software is called OnTheSystem because it lets you manage your business *on-the-system*.

OnTheSystem is an internet based software application that combines strategic planning, organizational development, team-building and personal productivity tools into one easy-to-use management framework.

OnTheSystem consists of the following five leadership tools:

1. **Business Model Builder**
Helps you create your organizational structure consisting of departments, job-roles and employees.
2. **Strategic Planning System**
Helps you plan strategies and identify specific, achievable goals for every organizational element: company, departments, roles and employees.
3. **Project/Task Management Tool**
Helps you manages projects and assignments.
4. **Knowledgebase**
Helps you document the know-how of your organization, including "how-to's," "lessons learned," "best practices," policies and procedures, forms, work instructions, etc.
5. **Communication Logging System**
Encourages all stakeholders (owners, employees, consultants, etc) to share their problems, insights and ideas for improving your organization while providing a valuable alternative to email and meetings.



OnTheSystem uses the five tools to build the following three clickable, online management reports:

1. **Department Profile Page**
A one-page strategic plan.
2. **Role Profile Page**
A process improvement report.
3. **Employee Profile Page**
An employee performance management report.

The tools and reports make it easy for you to create your company's organizational structure, strategic plans, programs of continual improvement and book of knowledge.

Create your free, three-user account at www.onthesystem.com

GETTING STARTED

Get started by signing up at:

www.tgasbc.org

Once signed up you will receive additional instructions for accessing the online software, training and support available to all Challenge participants.

Ready, Set, GO!

To earn your Bronze Award simply complete the following steps in order:

Required

Assignment #1: Create your organizational structure:

Complete Worksheet #1: Departments - Sketch out your department list.

Complete Worksheet #2: Role - Sketch out your company roles.

Complete Worksheet #3: Employees - Compile a list of all of your employees and their email addresses.

Optional

Assignment #2: Customize your company's strategic objectives.

Review and edit the default company, department, role and employee objectives that pre-populate your OnTheSystem account

Optional

Assignment #3: Customize your organizational values and other elements.

Review and edit the default organizational values, core competencies, log categories and consensus questions that pre-populate your OnTheSystem account.

Assignment #4: Enter your company data on-the-system:

Optional

Step #1: Setup your organizational objectives - Refer to Assignment #2 to customize your department, role and employee objectives, if desired.

Optional

Step #2: Setup your department properties - Refer to Assignment #3 to customize your organizational values, core competencies, log categories and consensus questions, if desired.

Required

Step #3: Setup your organizational structure in the following order:

1. Setup your departments
2. Setup your roles
3. Setup your employees

Notice that many of the above steps are optional. That's because your business-development software comes pre-populated with a set of default strategic objectives and organizational elements. Customizing the default data is optional. However, even if you choose not to customize the default objectives and organizational elements now, please read the information that accompanies each step. This will help you understand how to use your new software.

Step One - Going for Bronze

Setup your business model

Bronze Requirements: Use your OnTheSystem business development software to:

- Create your company's organizational chart consisting of departments, roles and people.
- Create a basic strategic plan consisting of a vision/mission statement and a set of general objectives related to departments, roles and people.

Four Bronze Assignments:

- #1. Create your organizational structure
- #2. Customize your strategic objectives
- #3. Customize your company's values
- #4. Enter your company information OnTheSystem

Why This Step is Important:

The success of your business ultimately depends on the strength of its organizational infrastructure. Organizational infrastructure consists of three basic elements:

- Departments
 - Roles (individual processes or jobs)
 - People (employees)

Departments are used to categorize roles so similar work can be easily managed. People are then assigned to perform the roles.

This simple structure, when combined with well documented roles, is the basis for creating a strong, flexible and scalable company. Ultimately your objective should be to document each role so thoroughly that your employees can easily learn new roles and advance as your company grows.

For now, while competing for a GASBC Bronze award, you will simply focus on creating your organizational structure consisting of departments, roles and people. Later, when competing for a Silver award you will focus on documenting each role.

As a small business owner you may be wondering why it is important to create a defined organizational structure at such an early stage in your company's development. After all, you are your company. You perform the mass majority of roles in your company. So why go through the time and trouble of documenting work that for the foreseeable future you will perform yourself?

Your answer is simple: Your company's success depends on having a strong,

well documented business model. If your company depends on you (or key employees) to perform specific roles, its success is limited by your time and availability. Alternatively, if you create a scalable operating structure with well documented roles you can grow quickly by delegating your responsibilities to an ever increasing team of employees.

Small businesses that lack scalable infrastructure often suffer severe growing pains including stress, disorganization, employee problems, quality issues, customer dissatisfaction, and an inability to break through to their next level of success.

Ironically, by the time most small business owners realize they need to get organized and document their company's business model they are so over-worked and overwhelmed that they do not have the time to work on their business. They are too busy working in it.

If you find yourself in this situation, participating in the GASBC should help you build the infrastructure your business needs using a very thoughtful, step-by-step process.

If you have employees, we encourage you to get your entire team involved in the Great American Small Business Challenge. For example, you can ask your employees to document the know-how related to the roles they perform.

Your employees should be eager to help. Like you, they want to maximize their opportunity. They realize they cannot advance in your company if the roles they perform are too dependent on them. They will want to free themselves from their "job traps" so they can assume new responsibilities and grow with your company as it grows.

Assignment #1: Create your organizational structure

Use the following three worksheets to map your company's organizational structure consisting of:

- **Worksheet #1:** Departments
- **Worksheet #2:** Roles, and
- **Worksheet #3:** Employees

Once prepared, you will use these three worksheets to populate your OnTheSystem business-development software.

? TIP: DEPARTMENTS

The purpose of establishing departments is to categorize related roles (processes) so that work can be managed efficiently and effectively. Use the following set of seven departments as a guide. They are the basic set of departments used by most companies to organize the work they perform.

- Accounting
- Sales & Marketing Department
- Human Resources (HR)
- Information Technology (IT)
- Research & Development (R and D)
- Customer Service Department
- Operations Department

Add departments that relate to your business. For example, if you are a medical office you may want to add a "Lab Department" and "Regulatory Compliance" department.

Worksheet #1: Departments - EXAMPLE

- Use this workspace to list your company's departments.
- Indicate one employee as manager for every department you list.
- Don't worry if you list one employee multiple times. One (or few) employees wearing multiple hats is normal in small businesses.

! If you need assistance contact your GASBC Counselor. Your counselor will help you create a departmental structure that best serves the needs of your company.

Department

Department Manager

- Accounting
- Sales & Marketing
- Human Resources
- Information Technology
- ~~➤ Research & Development~~
- Customer Service
- ~~➤ Operations~~
- Lab
- Scheduling
- Medical Records

- Sue Richards
- Sue Richards
- Sue Richards
- Sue Richards
- Sue Richards
- Dr. Zaber
- Sue Richards
- Sue Richards

! Use the blank "Department" worksheet on the next page! Make as many photocopies as you need.

Worksheet #1: Departments

- Use this workspace to list your company's departments.
- Indicate one employee as manager for every department you list.
- Don't worry if you list one employee multiple times. One (or few) employees serving multiple management positions is normal.

Department (Workgroups, Teams)	Department Manager

**! Use the blank "Role" worksheet on the next page!
Make as many photocopies as you need.**

Roles- (Processes) **EXAMPLE******

- Create a complete list of all the roles you or your employees perform in the normal course of operating your business.
- Organize your list by department.
- If possible list the roles in your departments' workflow order. For example, if the role occurs as a series of steps list the roles in sequential order.
- If a role is complex consider breaking it down into smaller bite-sized roles that will be easier to document.
- Identify all the employees who know how to perform each role. Indicate one employee as the role's primary manager.
- Photocopy as many copies of this worksheet as you need.

Department	Role (Process)	Employee
Accounting	Make Deposits Reconcile Bank Statements Invoicing Send Customer Statements Past Due Calls Payroll Check Preparation Payroll Tax Deposits Payroll Tax Returns Vendor Invoice Data Entry Accounts Payable Payment Analysis Write Checks Checks Data Entry Monthly General Ledger Updates Financial Statement Printing	Mike K. Mike K. Mike K. Sally R. Mike K. Mike K. Mike K. Mike K. Sally R. Mike K. Mike K. Sally R. Mike K. Mike K.
Sales and Marketing	Prepare marketing kits Send marketing kits Format monthly newsletter Confirm sales call appointment	Mike K. Sally R. Mike K. Sally R.

? DEFINITION: A Role (or process) = A Bite Sized Chunk of Work

IMPORTANT: Use the word role (or process) to refer to any "bite-sized chunk of work" performed and managed by a department. It does not matter if that work is a large or small "chunk." What's important is that you're able to easily document the policies, procedures and training methods related to performing that "work."

So, when developing your list of "Roles" make sure you break down your department into "bite-sized chunks" of work that can be easily documented using your KnowledgeBase. If you feel the role is too complex, break it down into several smaller "bite-sized chunks of work" so that each "chunk" can be easily documented and digested (learned) by your current or future employees.

Worksheet #2: Roles (Processes)

- Create a complete list of all the roles you or your employees perform in the normal course of operating your business.
- Organize your list by department.
- If possible list the roles in your departments' workflow order. For example, if the role occurs as a series of steps list the roles in sequential order.
- If a role is complex consider breaking it down into smaller bite-sized roles that will be easier to document.
- Identify all the employees who know how to perform each role. Indicate one employee as the role's primary manager.
- Photocopy as many copies of this worksheet as you need.

Department

Role (Process)

Employee

Department	Role (Process)	Employee

Worksheet #3: Employees

Create an employee list consisting of the following information:

- First Name
- Last Name
- Primary email address

First Name

Last Name

Primary Email Address

First Name	Last Name	Primary Email Address

This step is optional

Assignment #2: Customize your strategic objectives

Your OnTheSystem Business-Development software comes pre-populated with a set of default strategic objectives.

These objectives are presented in the boxes to the right.

Review each objective. Determine if they are consistent with your general business philosophy.

Indicate any changes you would like to make. In the next assignment you will apply your changes to your OnTheSystem software.

Notice that the objectives assume you have employees. We suggest you retain the employee-related language even if you do not currently have employees. This will help prepare the organizational structure you will need to engage future employees.

Keep in mind that these objectives are meant to apply to all departments, roles and employees. Do not add specific or measurable goals at this time. (You will develop specific and measurable objectives associated with specific departments, roles and employees when competing for your Silver Award).



Please note that these suggested objectives were carefully written to help your company leverage the full power of the OnTheSystem business-development software. Before making significant changes we encourage you to discuss your revision with your GASBC counselor.



When creating a new department, role or employee your OnTheSystem software automatically copies the appropriate default objective into the setup screen. This promotes consistency and makes it easy to complete the setup process.

Default Company Mission Statement:

Become our customer's first choice in our marketplace. Provide a great work environment where all employees treat each other with dignity and respect. Focus on achieving the highest standards of quality, customer service, innovation, proactive management, productivity and fun. Contribute positively to our communities and our environment. Recognize that profitability is essential to our future success.

Default Department Objective:

All roles are completely standardized with employees cross trained and easily promotable. All employees participate in implementing the department's improvement projects and to-do's. Employees actively use the Communication Logs to report ideas, problems and other information. The department work environment is characterized by open-communication, continual-learning, cooperation, mutual-respect and fun.

Default Role Objective:

The role is completely standardized with multiple employees cross trained and easily promotable. Step-by-step procedures and training materials (including videos, if applicable) are posted to the KnowledgeBase. Employees actively use the Communication Logs to report ways to improve the operations of the role.

Default Employee Objective:

You are actively learning new roles as specified in your "training plan." You actively participate in implementing your department's improvement projects and to-do's. You consistently use the Communication Logs to report your ideas, information, problems and opportunities. You contribute to our organization's KnowledgeBase by creating or improving training materials related to the roles you perform. You promote our organization's values of open-communication, continual-learning, cooperation, mutual-respect and fun.

This step is optional

Assignment #3: Customize your organizational values and other elements

Your OnTheSystem Business-Development software comes pre-populated with a set of default organizational elements:

- Values
- Core competencies
- Log categories, and
- Consensus questions

You can access, and modify these elements on a department-by-department basis by holding your mouse over the Administration Tab and selecting the Company/Department Setup screen.

When creating a new department, OnTheSystem automatically copies the values, core competencies, log categories and consensus questions assigned to the new department's parent. This makes it easy to setup a new department because most information is completed for you.

PLEASE NOTE: This "copy function" is only performed once ~ upon the department's creation. If you reassign the department to a new parent the values, core competencies, log categories, and consensus questions will not change. You will need to manually adjust these elements, if desired.

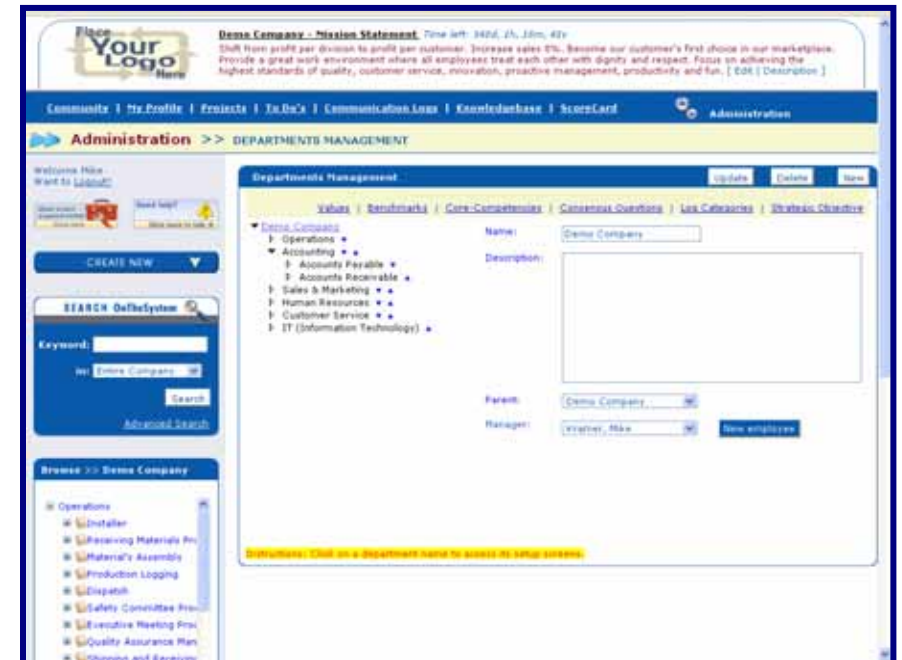
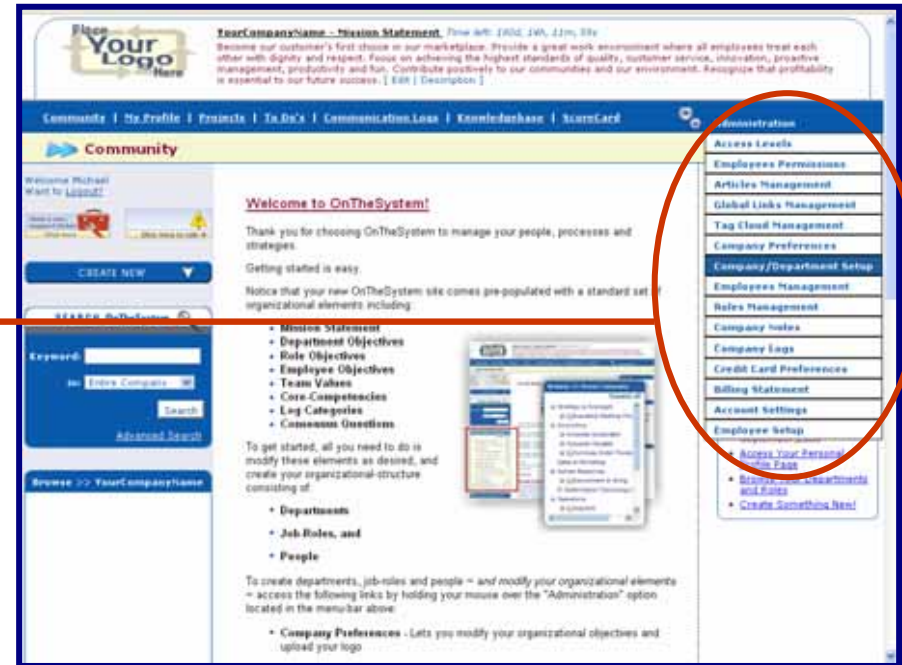
Think of it this way: Each department inherits the DNA of its parent. That's why it is important to modify these OnTheSystem organizational elements ~ at the company level ~ before you start creating departments, because every department you create will inherit the values and other elements of the main company level.

Instructions:

The worksheets on the following page list the default elements that come with your OnTheSystem account.

Review each element. Determine if they are consistent with your general business philosophy.

Indicate any changes you would like to make. In the next assignment you will apply your changes to your OnTheSystem software.



! TIP: VALUES ~ *The behaviors you want to promote*

Sometimes leaders have a hard time understanding the importance of defining the values of their organization. It seems so esoteric and wishy-washy.

However, creating a list of common characteristics, attitudes and behaviors that all the people of your organization can rally around, is one of the most important exercises an organization can perform.

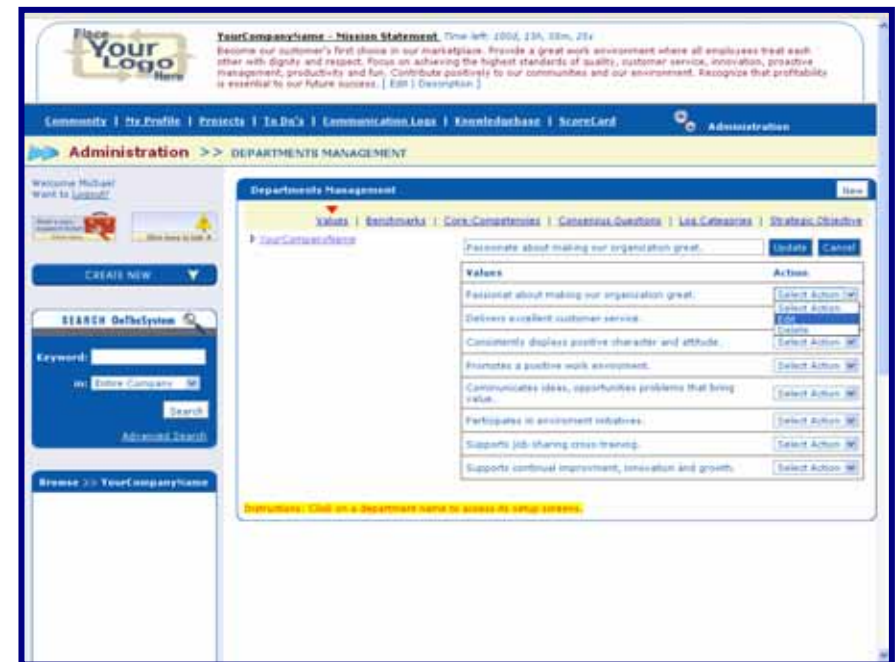
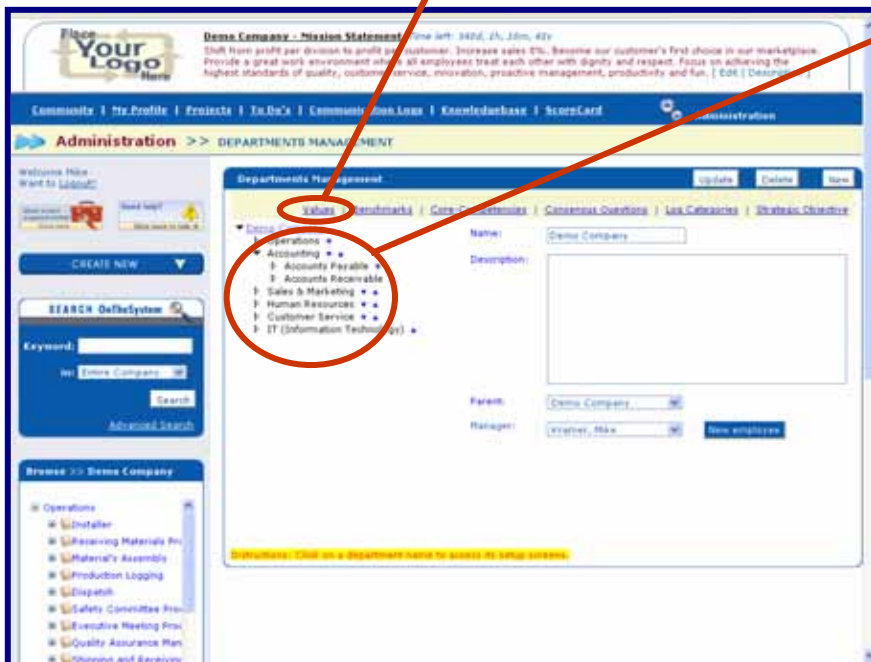
The reason values are so important is that people create great *organizations* and the best *organizations* function as a community. The most vibrant and effective *communities* unite around a common set of values.

That's why your organization needs to define its set of values:

1. It will improve the way you hire because you will be sure to select candidates that you feel will best fit into your "community."
2. It will help align existing personnel to the needs of your organization by promoting behaviors that help achieve your Strategic Objectives as quickly and easily as possible.

OnTheSystem lets you track unlimited values. These values are input using the "Company/Departments Setup" option located in the Administration drop-down list. Once on the department management page you simply click on the department you want to manage and you will be able to click the "Values" link that appears in the sub-navigation bar.

Values appear on the Employee "Values" ScoreCard.



Instructions: Review and modify the following four worksheets. You will refer to these worksheets later when customizing your OnTheSystem account settings.

Values Worksheet:

This step is optional

Review the following set of values that are supplied with your new OnTheSystem account.

These Values are used to populate your Employee's ScoreCards. Determine if they are consistent with your general business philosophy? Make any changes you like:

- Passionate about making our organization great.
- Delivers excellent customer service.
- Consistently displays positive character and attitude.
- Promotes a positive work environment.
- Communicates ideas, opportunities, problems that bring value.
- Participates in improvement initiatives.
- Supports job-sharing and cross-training.
- Supports continual improvement, innovation and growth.

Core Competencies Worksheet:

This step is optional

Review the following set of Core Competencies that are supplied with your new OnTheSystem account. These Competencies are used to populate your Department ScoreCards. Determine if they are consistent with your general business philosophy? Make any changes you like:

- Leadership & Governance
- Employee Relations
- Legal & Regulatory
- Accounting
- Process Standardization
- Quality Assurance
- Plant & Equipment
- Technology
- Sales & Marketing
- Customer Relations
- Innovation
- Industry Relations
- Stakeholder Relations
- Marketplace Analysis
- Strategic Planning
- Project Management
- Team Management
- Organizational Skills

Consensus Questions Worksheet:

This step is optional

Review the following Consensus Questions that are supplied with your new OnTheSystem account. These questions populate the discussion forum associated with new projects. Use the questions to help project-teams follow best-practices and make better decisions.

Determine if the questions are consistent with your general business philosophy? Make any changes you like:

- How will this project improve our competitive position?
- How will this project add value for our clients/customers?
- How does this project compare to what other companies are doing in our industry?
- What alternative projects should we consider, if any?
- What is the projected first year benefit? (Financial and Qualitative)
- What issues were difficult to achieve consensus?

Log Categories Worksheet:

This step is optional

Review the following Categories that are supplied with your new OnTheSystem account. These are the categories you can assign to ideas, problems and other information you log OnTheSystem. Determine if they are consistent with your general business philosophy? Make any changes you like:

- Ideas & Suggestions
- News & Trends
- Operational Issues
- Customer Issues
- Opportunities
- Threats
- Other



Please note that these suggested elements were carefully written to help your company leverage the full power of the OnTheSystem business-development software. Before making significant changes we encourage you to discuss your revisions with your GASBC counselor.

Assignment #4: Enter your company data on-the-system

By now you should have created your free OnTheSystem account. If not, please contact your GASBC counselor or the GASBC for assistance.

Access your OnTheSystem login screen by using the following URL:
<https://onthesystem.net>

Next, input your user-name and password. Your user name is the email address that you provided to OnTheSystem upon signup. If you forgot your password, simply input your email address and click on the "forgot your password?" link. Your password will be automatically sent to your email account.

Once logged in you're given instant access to your organization's OnTheSystem home page.

As discussed, your new OnTheSystem account comes pre-populated with a:

- Standard company mission statement
- A general set of department, role and employee objectives
- A set of organizational elements including:
 - Values
 - Core-competencies
 - Communication log categories
 - Consensus Questions

To get started, all you need to do is follow a simple three-step process:

1. **OPTIONAL** - Customize (if desired) your basic set of strategic objectives using the Company Preferences screen.
2. **OPTIONAL** - Customize (if desired) your basic set of organizational elements consisting of values, core competencies, consensus questions and communication log entries.
3. **REQUIRED** - Setup your organizational structure consisting of departments, roles and employees.

! As you can see the steps seem to be in reverse order. First you are customizing your strategic objectives and organizational values. Second you are creating your departments, employees and roles.

This "reverse" order streamlines your setup process because every department you create will automatically inherit your customized objectives and organizational elements of your company. This saves you time and keeps all of your departments consistent.



! OnTheSystem requires the Firefox Browser to work properly. Visit www.onthesystem.com/firefox for free download instructions.

This step is optional

Step #1: Setup your organizational objectives

Refer to the Strategic Objectives Worksheets that you prepared in Assignment #2 to complete this step.

Customize your company's default objectives by accessing the Company Preferences screen, by holding your mouse over the "Administration" tab and clicking on the "Company Preferences" link.

You're given instant access to your Preferences screen. The screen displays a default set of strategic objectives for your organization.

OnTheSystem uses these objectives to populate setup screens every time you create a new department, role or employee.

These objectives have been carefully written to help promote best-practices and help you maximize your benefit of using your OnTheSystem business development software.

For example, the Department objective starts by requesting that:

All roles are completely standardized with employees cross trained and easily promotable.

This statement is very important because it sets the expectation that your department use your online KnowledgeBase to document its methods, procedures and know-how.

The next statement asks that...

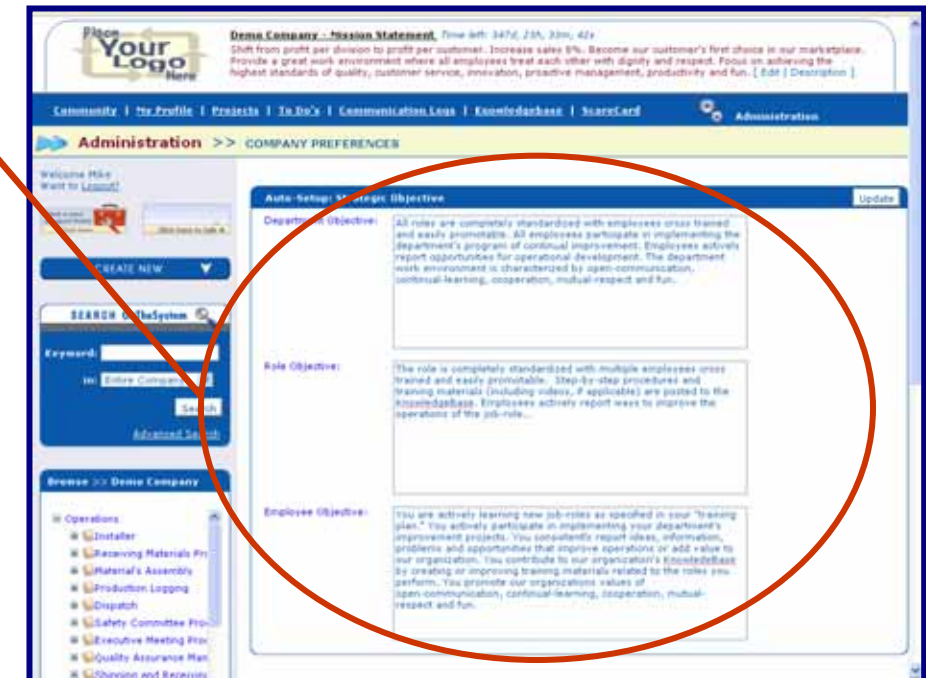
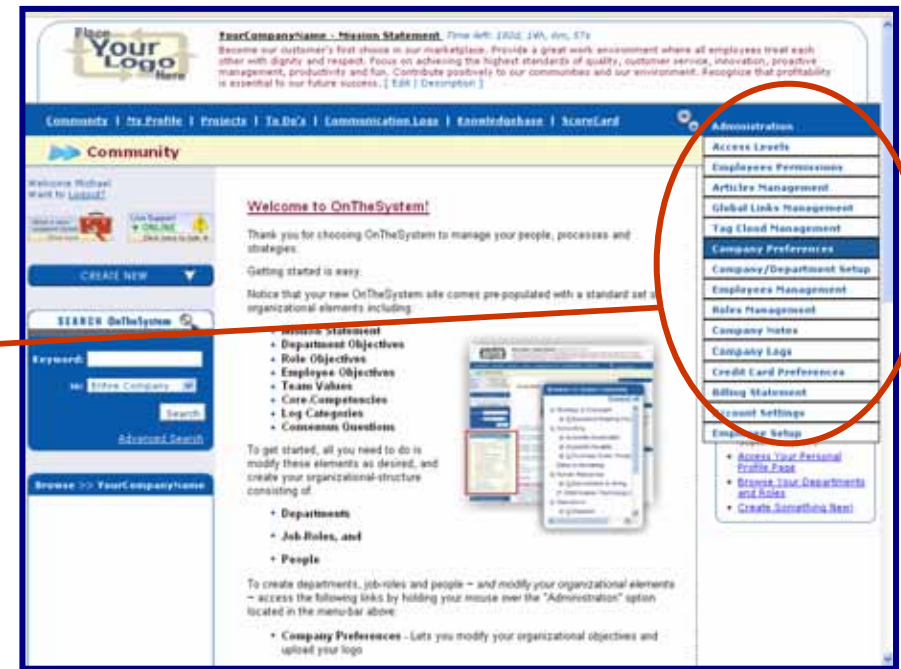
All employees participate in implementing the department's improvement projects and to-do's.

This statement is important because it sets the expectation that everyone use your online project management tools to manage your strategic improvement initiatives.

The next statement asks that:

Employees actively use the Communication Logs to report ideas, problems and other information.

This statement sets the expectation that everyone use your Communication Logging system to report their ideas, problems and suggestions. It encourages employees to report information that can help your department improve quality, productivity or save money.



Your Department Objective concludes by setting the expectation that:

The department work environment is characterized by open-communication, continual-learning, cooperation, mutual-respect and fun.

Obviously, this is important because the best run organizations function as a “community-of-people” who care about each other and help each other succeed.

Notice that the same logic has been applied to the suggested Role Objective and Employee Objective.

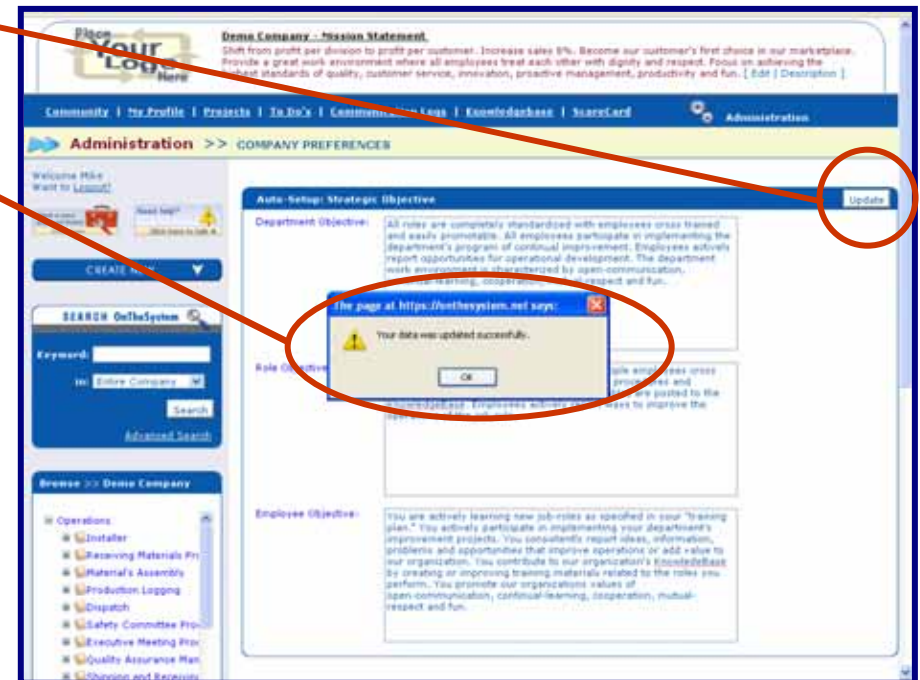
They've been written to encourage your current and future employees to get OnTheSystem:

- Creating your organizational structure.
- Documenting your company's policies, procedures and training methods.
- Participating in improvement initiatives.
- Sharing their ideas.
- Working together to create a positive work-environment.

To make changes simply edit the appropriate text window.

When finished, click on the Update button.

A message box will appear letting you know that your changes are saved.



! Use the Worksheets that you prepared in Assignment #2 to guide any changes you want to make.

! Keep your changes general because these objectives have to be relevant for every department, role or employee that you create OnTheSystem.

You will customize these default objectives with specific and measurable objectives related to the specific department, role and employee later using their individual setup screen when competing for your Silver Award.

Upload Your Company Logo

Complete the Company Preferences Screen by scrolling to the bottom of the page where you'll find the Company Logo section.

Use this section to upload your organization's logo.

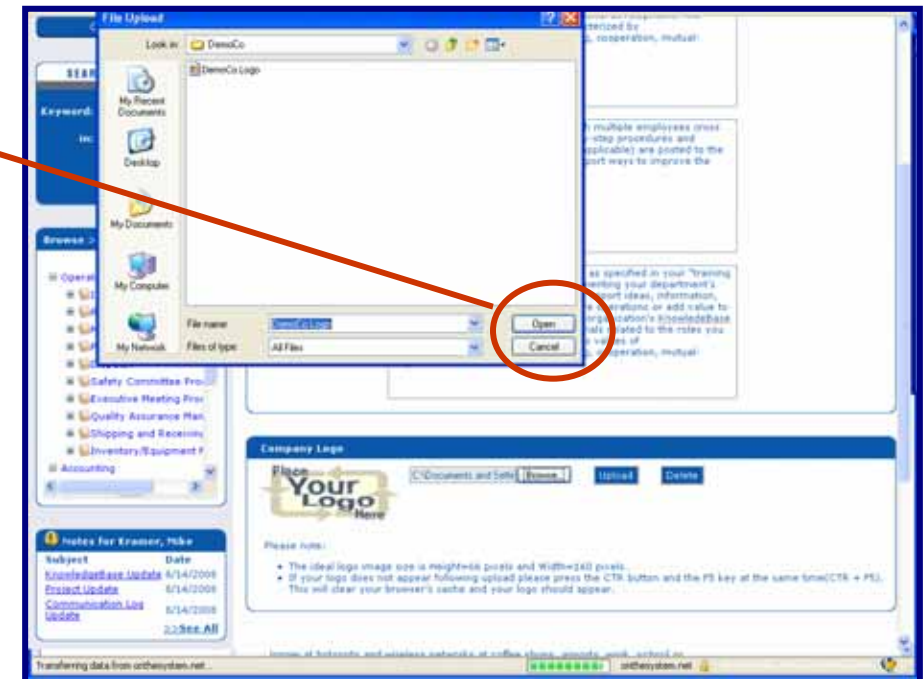
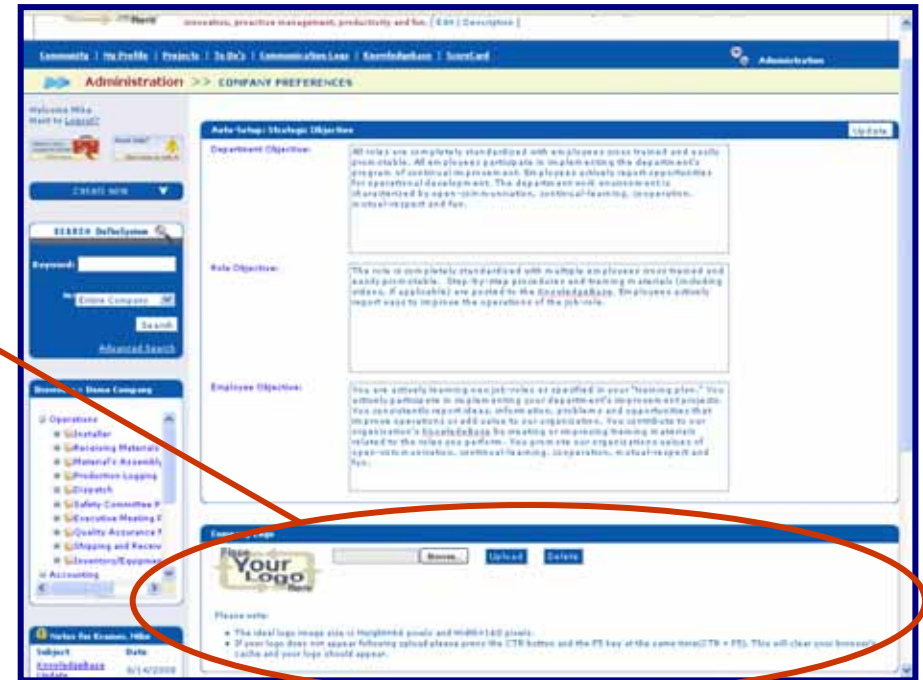
Once uploaded, your logo will appear in the Masthead of every page.

Before uploading your logo, make sure you resize it to a Height=66 pixels and Width=160 pixels. Otherwise your logo will appear distorted.

Also keep in mind that you can only upload a jpeg or gif image. Other formats will not display.

To Upload Your logo simply:

- Click on the "Browse" button and search for your logo on your computer.
- Once your logo is found click the "Open" Button followed by the Upload Button.
- Your logo will appear.
- If you are not happy with the way your logo appears simply click the delete button. Your logo will be removed from display. Then modify your image and try again.
- It may take a several attempt to get the results you want but the effort will be worth it.
- If you require assistance please contact your GASBC counselor or the GASBC.



If your logo does not appear following upload please press the CTR button and the F5 key at the same time (CTR + F5). This will clear your browser's cache and your logo should appear.

Depending on your computer's configurations, you may also need to log off and log back OnTheSystem.

This step is optional

Step #2: Customize Your Department Properties

Refer to the Worksheets that you prepared in Assignment #3 to complete this step.

Customizing your department settings lets you manage your organization your way, with your unique leadership style, and emphasizing areas of your organization that are important to you.

What's more, it lets you take theoretical ideas like team-values, core-competencies and strategic alignment and bring them to life by making them part of your organization's everyday workflow.

As you'll see, OnTheSystem helps you create a world-class organization that promotes the kinds of best-management practices that can result in extraordinary competitive advantage.

Access your department setup screen by holding your mouse over the "Administration" tab and click on the "Company/Department Setup" link.

You're given instant access to the Department Setup Screen.

Now, click on your organization's name located on the left side of the "Department Management" section.

Notice what happens.

The Department sub-navigation appears.

Now, you can manage any of the department's elements simply by clicking on the Sub-navigation links.

For your convenience, and to help guide you, your OnTheSystem account comes pre-loaded with a suggested set of:

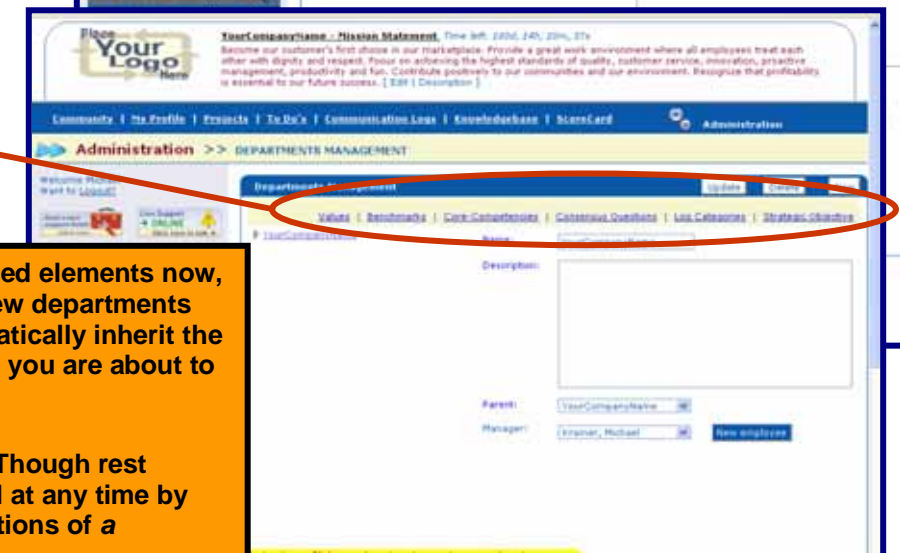
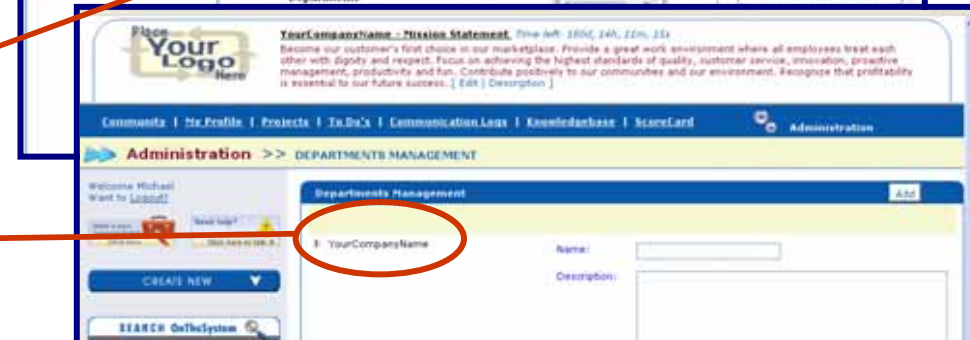
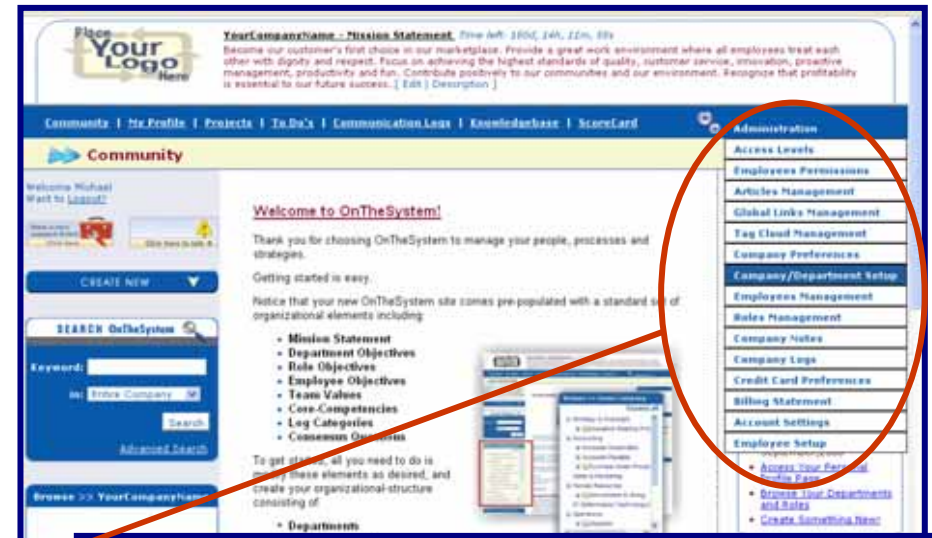
- Values
- Core-Competencies
- Consensus Questions, and
- Log Categories

All you need to do is modify these elements to suit the specific needs of your organization.



It's important to adjust these pre-loaded elements now, at the Company level, because any new departments that you create on-the-system will automatically inherit the values listed in these sub-sections. And, you are about to create a lot of departments.

A little thought now will save time later. Though rest assured anything you do can be adjusted at any time by simply accessing the sub-navigation sections of a particular department.



This step is optional

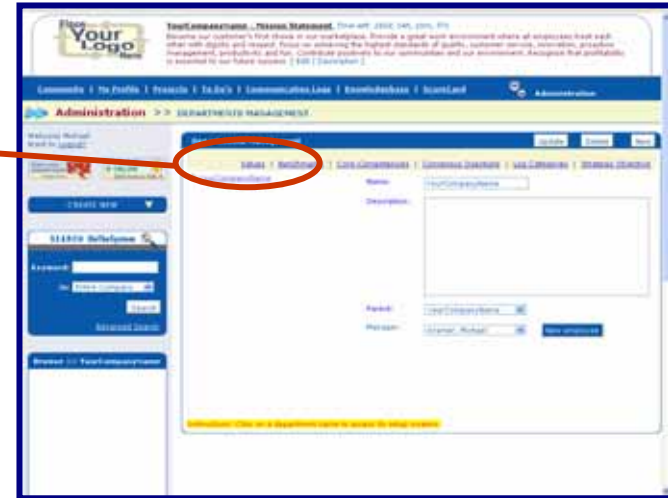
Start by clicking on the **values** link.

A list of values that come with your OnTheSystem account appears.

You can modify or delete any of the listed values by using the action drop-down list that appears along side each line item.

Or you can add to the list by typing in a new value and clicking the add or update button.

Values appear on the Values Alignment ScoreCard for any employee associated with this department.



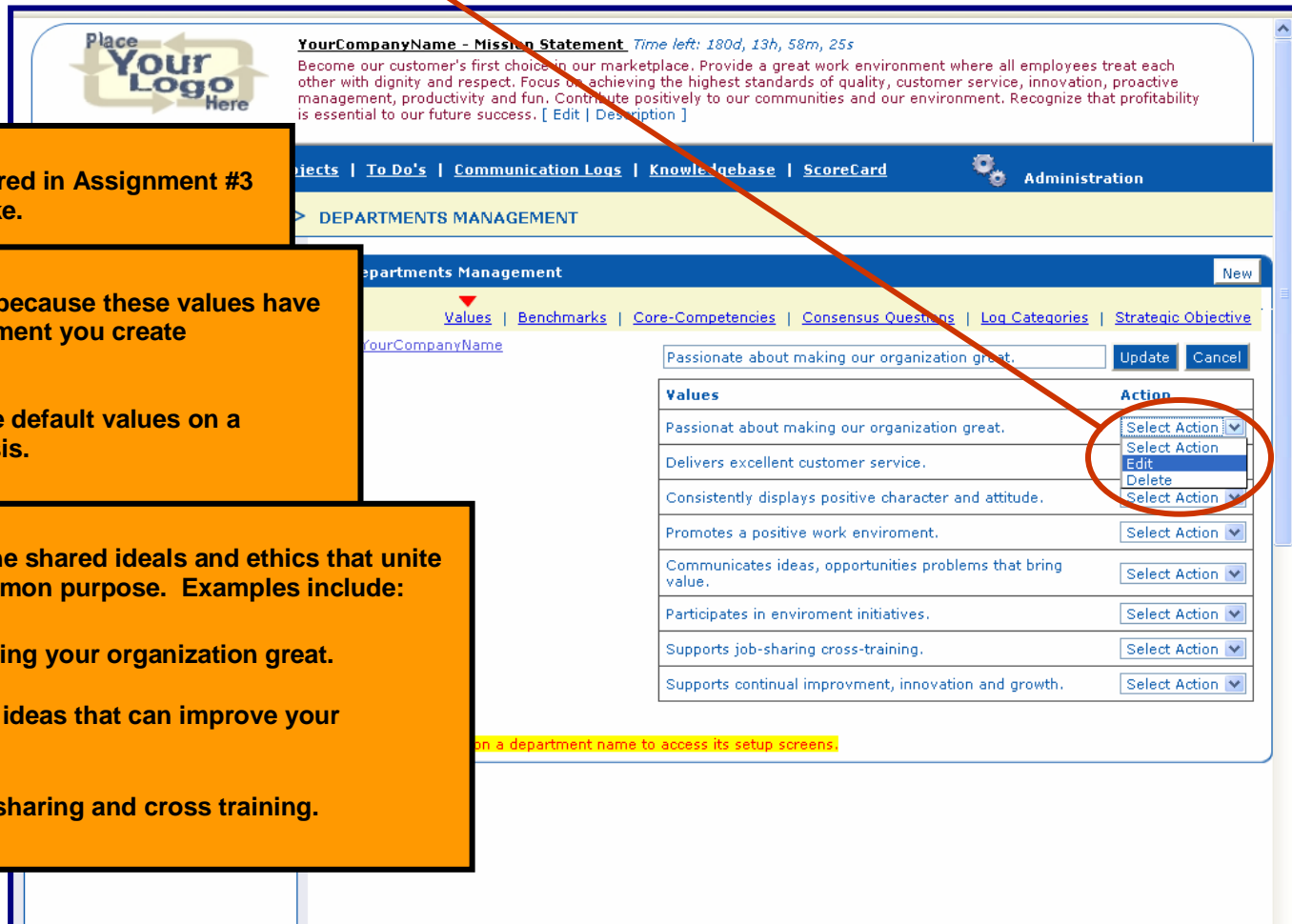
! Use the Worksheets that you prepared in Assignment #3 to guide any changes you want to make.

! Keep your changes general because these values have to be relevant for every department you create OnTheSystem.

Later, you can customize these default values on a department-by-department basis.

! Values represent the shared ideals and ethics that unite your team with a common purpose. Examples include:

- Passion for making your organization great.
- Communicating ideas that can improve your organization.
- Supporting job-sharing and cross training.



Values	Action
Passionate about making our organization great.	Select Action
Passionat about making our organization great.	Select Action
Delivers excellent customer service.	Edit
Consistently displays positive character and attitude.	Delete
Promotes a positive work enviroment.	Select Action
Communicates ideas, opportunities problems that bring value.	Select Action
Participates in enviroment initiatives.	Select Action
Supports job-sharing cross-training.	Select Action
Supports continual improvment, innovation and growth.	Select Action

Next, click on the **Benchmarks** link:

We won't review this section now because, as you can see this sub-section comes empty. Benchmarks must be created on a department-by-department basis.

! Benchmarks are key performance indicators like sales, gross profit, and number of new customers.

! Don't add any benchmarks now! Wait until your departments are set up.

This step is optional

Next, are **Core-Competencies**:

Again you can modify or delete individual items using the action drop down list or you can add competencies that relate to your organization using the add field.

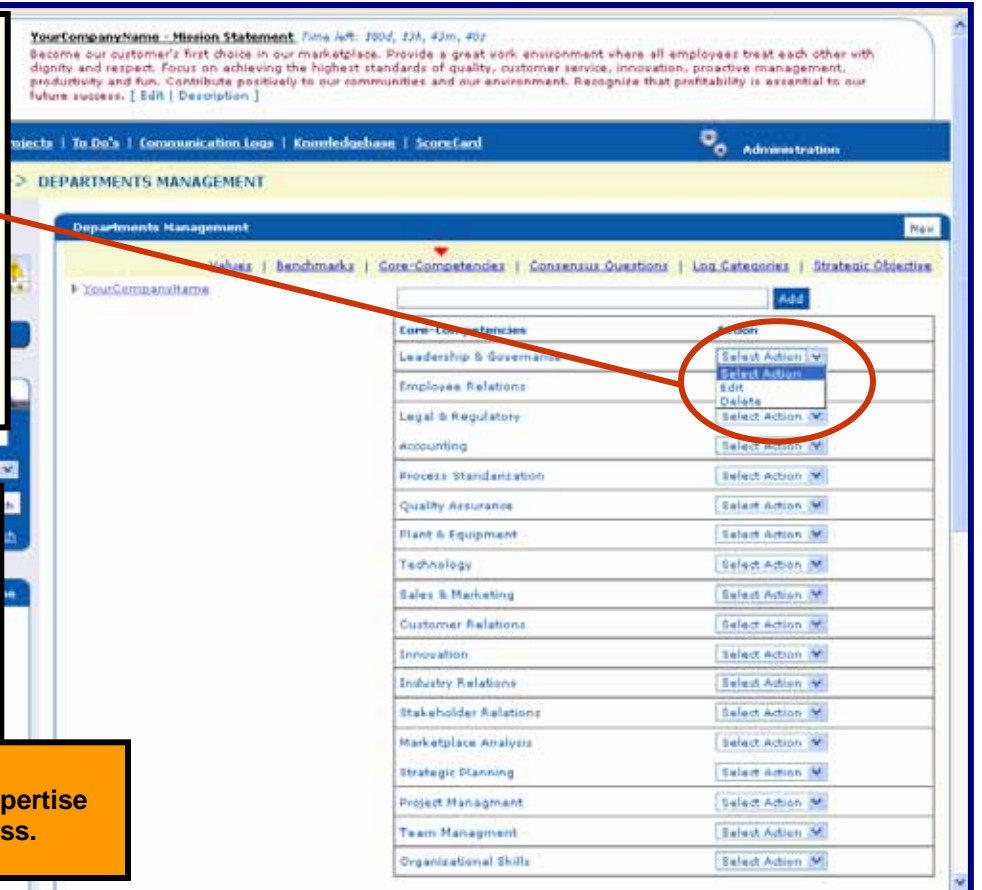
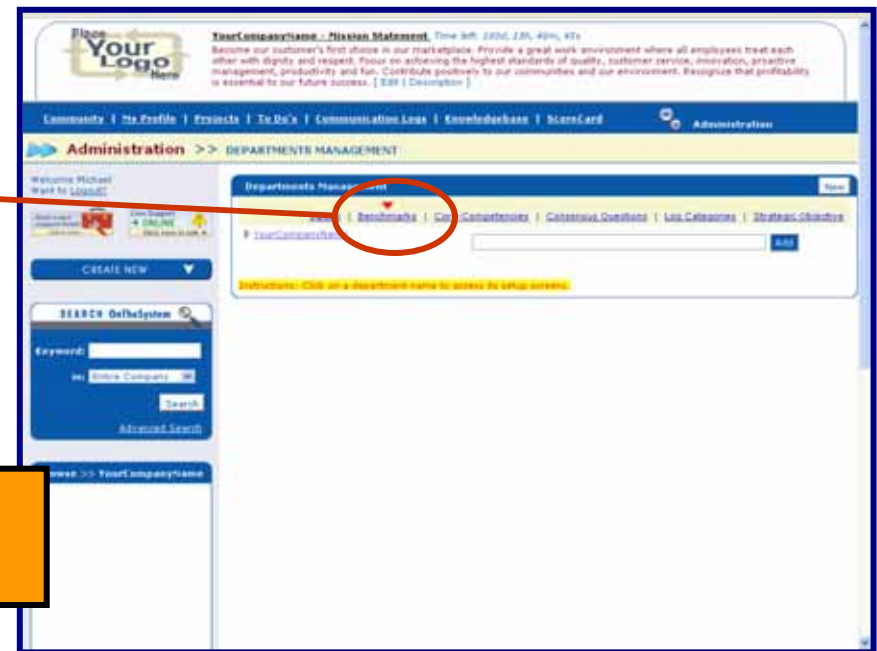
Your departments' Core Competencies appear on the 360 degree Review ScoreCard located on its Department profile page.

! Use the Worksheets that you prepared in Assignment #3 to guide any changes you want to make.

! Keep your changes general because these core-competencies have to be relevant for every department you create OnTheSystem.

Later, you can customize these default competencies on a department-by-department basis.

! Core Competencies are capabilities and areas of expertise that are critical to your departments' continued success.

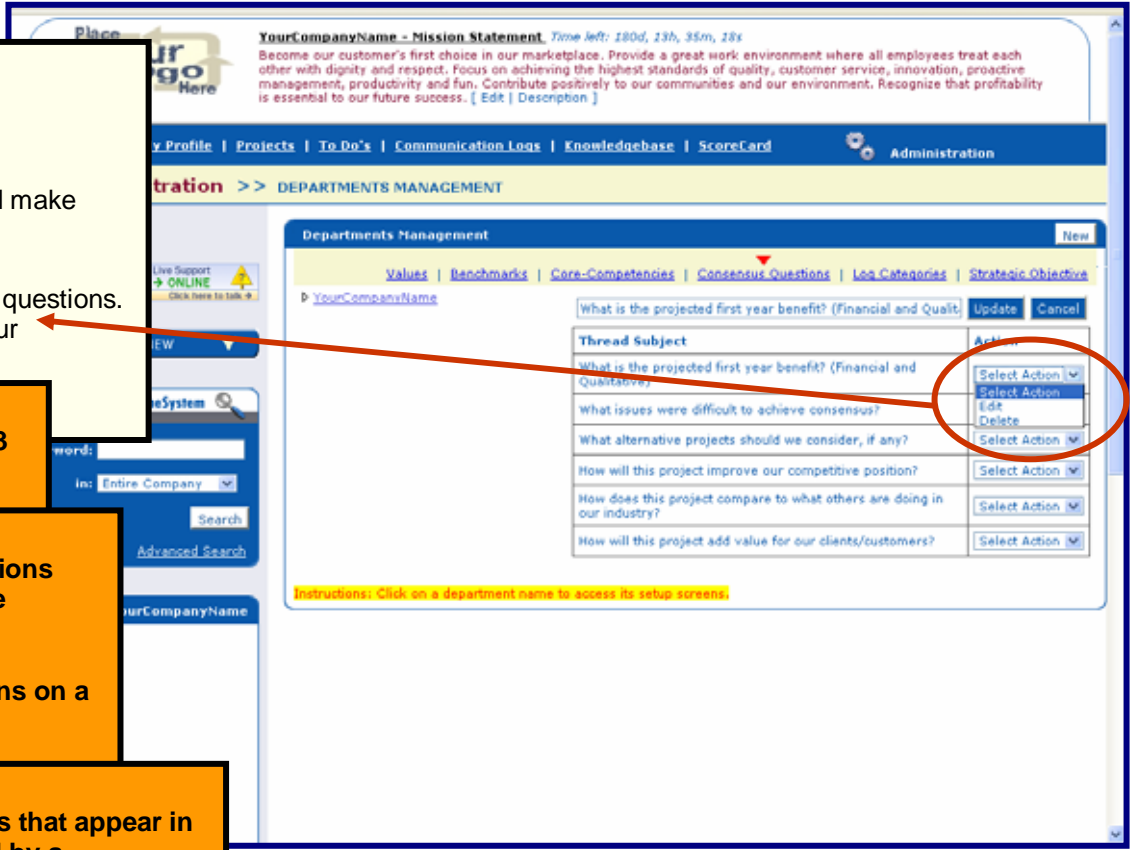


This step is optional

Next click on the **Consensus Questions** link:

Use consensus questions to help your project-teams work together and make better decisions for your organization.

Your OnTheSystem account comes pre-loaded with a list of suggested questions. Add, edit or delete items to create a list of questions that will benefit your organization.



! Use the Worksheets that you prepared in Assignment #3 to guide any changes you want to make.

! Keep your changes general because these questions have to be relevant for every department you create OnTheSystem.

Later, you can customize the list of project-questions on a department-by-department basis.

! Consensus Questions are Discussion topics that appear in the Consensus Section of all projects initiated by a department.

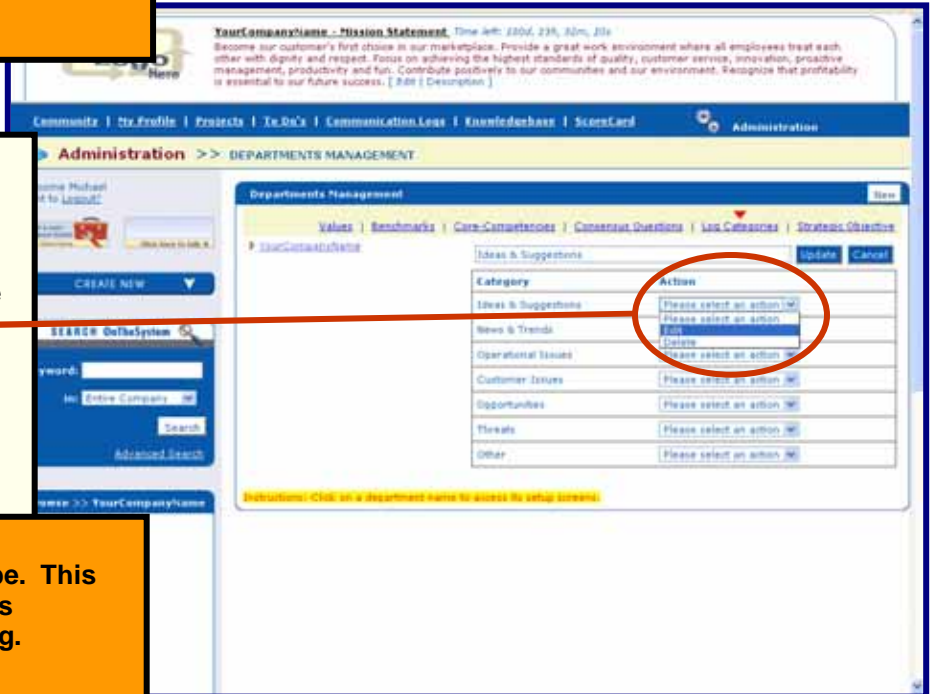
This step is optional

Next, click on the **Log Categories** link:

Use this section to customize the list of categories that appears every time one of your team-members creates a new Communication Log Entry.

Use the action drop-down list to add, modify or delete items.

Create a list of categories that will get the right information to the right people so that you can react quickly and make better decisions.



! Log Categories allow you to classify issues by type. This makes it easy to sort issues. It also helps employees understand the nature of the issue they are reviewing.

This step is optional

Lastly, click on the **Strategic Objectives** link:

It lists the selected department's active strategic objective and due-date.

And, since your only department right now is your organization itself the objective listed is actually your company's **mission statement**.

For your convenience, it comes pre-populated with a suggested Mission Statement.

If you want to modify your Company mission statement simply make your changes in the text box and click the save button.



Keep in mind new departments will not inherit this mission statement. Instead, new departments will inherit the default Department Objective that appears in your Company Preferences Screen.

Place Your Logo Here

YourCompanyName - Mission Statement Time left: 180d, 13h, 22m, 59s
Become our customer's first choice in our marketplace. Provide a great work environment where all employees treat each other with dignity and respect. Focus on achieving the highest standards of quality, customer service, innovation, proactive management, productivity and fun. Contribute positively to our communities and our environment. Recognize that profitability is essential to our future success. [Edit | Description]

My Profile | Projects | To Do's | Communication Logs | Knowledgebase | ScoreCard Administration

Administration >> DEPARTMENTS MANAGEMENT

Departments Management Save New

Values | Benchmarks | Core-Competencies | Consensus Questions | Log Categories | Strategic Objective

YourCompanyName Department Objective
Become our customer's first choice in our marketplace. Provide a great work environment where all employees treat each other with dignity and respect. Focus on achieving the highest standards of quality, customer service, innovation, proactive management, productivity and fun. Contribute positively to our communities and our environment. Recognize that profitability is essential to our future success.

Objective Expiry Date 03/15/2009

Instructions: Click on a department name to access its setup screens.

Department Unpublished strategic Objectives
There are no objective history for this department



WAIT! Did you make the changes you wanted to your values and other organizational elements?

If you haven't already done so, use the Worksheets that you prepared in Assignment #3 to guide any changes you want to make.

Take a few minutes to customize the following elements for your company:

- Values
- Core-Competencies
- Consensus Questions, and
- Log Categories

Keep your lists as simple and general as possible.

Once you create departments you can add, edit or delete items to meet the needs of individual departments.

Step #3: Setup Your Organizational Structure

OnTheSystem breaks down your organization into three structural elements:

- Departments
- Roles (Processes) and
- Employees

These elements are presented using a familiar tree-structure in your organization's Browse window located in your left-hand navigation column.

Notice how roles are assigned to specific departments -- and employees are assigned to specific roles (processes).

To expand or collapse elements of the tree simply click on the plus or minus signs next to the parent.

Use the handlebar located at the bottom of the window to expand your view and see more of your organizational structure.

Your "Browse" window makes it easy to understand how every element of your organization is connected to each other. It helps you identify ways to fine-tune your operating structure for peak-performance. It also gives you instant access to your organization's profile pages.

One click is all it takes to view a high-level management report for any department, role or employee

The screenshot displays the OnTheSystem web application interface. At the top, there is a header with a logo and navigation links. The main content area is divided into several sections. On the right side, there is a 'Browse >> Demo Company' window that shows a tree-structured organizational chart. The tree is expanded to show the 'Operations' department, which includes roles like 'Installer', 'Receiving Materials Pr', 'Material's Assembly', 'Production Logging', 'Dispatch', and 'Safety Committee Proc'. Below the tree, there is a list of employees: 'Landers, Chris (M)' and 'Kramer, Mike'. The interface also features a search bar, a 'Community' section, and various quick links on the right side.



Set up your organizational structure in the following order:

1. First, set up your departments.
2. Second, set up your employees
3. And last, set up your roles.

Using this specific setup order avoids the need to flip between different screens.

Setup Your Company's Departments OnTheSystem:

To setup your departments, hold your mouse over the "Administration" tab and click on the "Company/Department Setup" link.

You're given instant access to the "Departments Management Screen."

Now, refer to the Department Worksheet that you prepared in Assignment #1 for the list of departments you will setup OnTheSystem.

Even if you are a very small company, your list of departments should probably include the most common departments. This helps prepare the infrastructure your company needs to grow.

- Accounting
- Sales & Marketing Department
- Human Resources (HR)
- Information Technology (IT)
- Research & Development (R and D)
- Customer Service Department
- Operations Department

The screenshot shows the OnTheSystem Administration interface. The 'Administration' tab is active, and the 'Company/Department Setup' link is highlighted with a red circle. The interface includes a navigation bar with links for Communities, My Profile, Projects, To Do's, Communication Logs, Knowledgebase, and ScoreCard. The main content area displays a 'Welcome to OnTheSystem!' message and a list of organizational elements to be configured, such as Mission Statement, Department Objectives, Role Objectives, Employee Objectives, Team Values, Core Competencies, Log Categories, and Common Questions. A search bar and a 'Browse >> YourCompanyName' link are also visible.

! Use the Department Worksheet that you prepared in Assignment #1 for your company's list of departments to setup OnTheSystem.

! **TIP:** To start, limit your departmental structure to just one department level. You can always add additional department levels later and reassign job-roles as needed.

! Having a complete structure consisting of top-level departments makes it easier to categorize roles and employees by primary function.

The screenshot shows the OnTheSystem Administration interface with the 'Administration' tab selected. The 'DEPARTMENTS MANAGEMENT' link is highlighted. The main content area displays a 'Departments Management' screen with a table listing departments. A form for adding a new department is visible, including fields for Name, Description, Parent, and Manager. The 'Parent' field is set to 'YourCompanyName' and the 'Manager' field is set to 'Kramer, Michael'. A 'New Employee' button is also present.

To add a department, simply give it a name.

For now, skip the Department Description field. It's optional and you don't want to get bogged down with details during the setup process. You'll return to write a thoughtful department description later, as part of your organization's broader strategic planning process.

Next, is the "Parent" drop down list. It determines where your new department will appear within your organizational structure.

All of the departments that you are creating today are top-level departments like Accounting, IT and Human Resources. So, select your Company name as the parent.

(Later, you can add sub-departments, or reassign existing departments to different parents. This gives you great flexibility to optimize your company's organizational structure.)

OK just one more step:

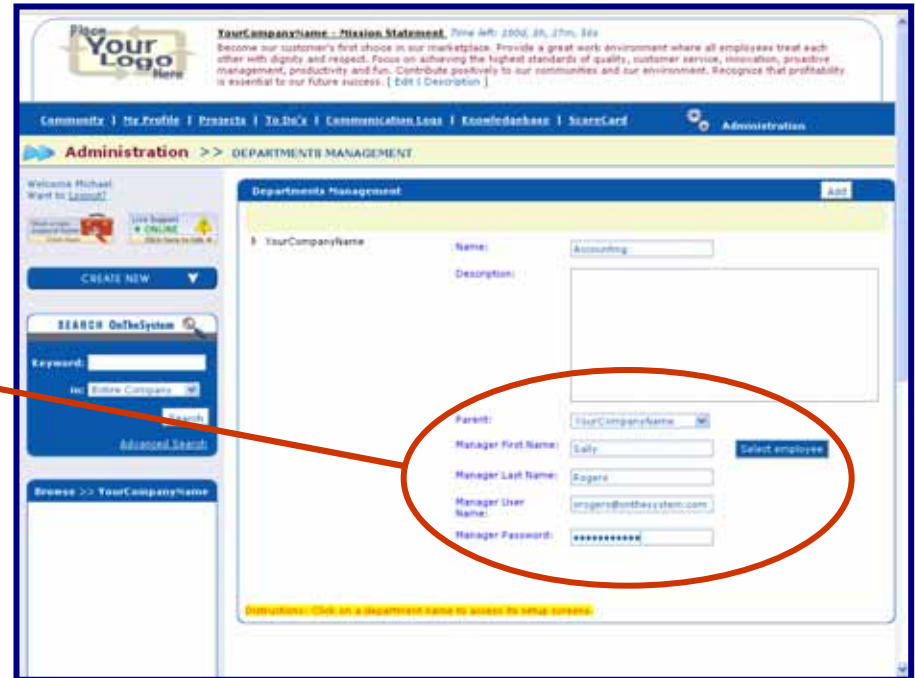
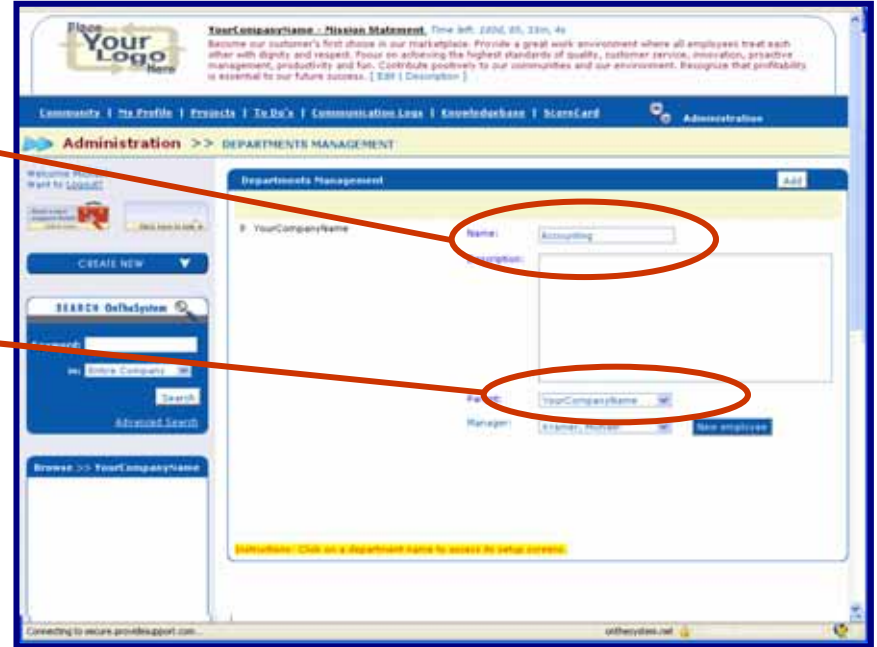
Use the Manager drop down list to assign primary responsibility for managing the department to just one individual.

Since you only have one employee name assigned to your organization you may need to click on the "New Employee" button.

It's a convenient way to add a new employee on-the-fly, without having to exit the department setup screen.

Simply indicate the manager's

- First Name
- Last Name
- User Name
- Password



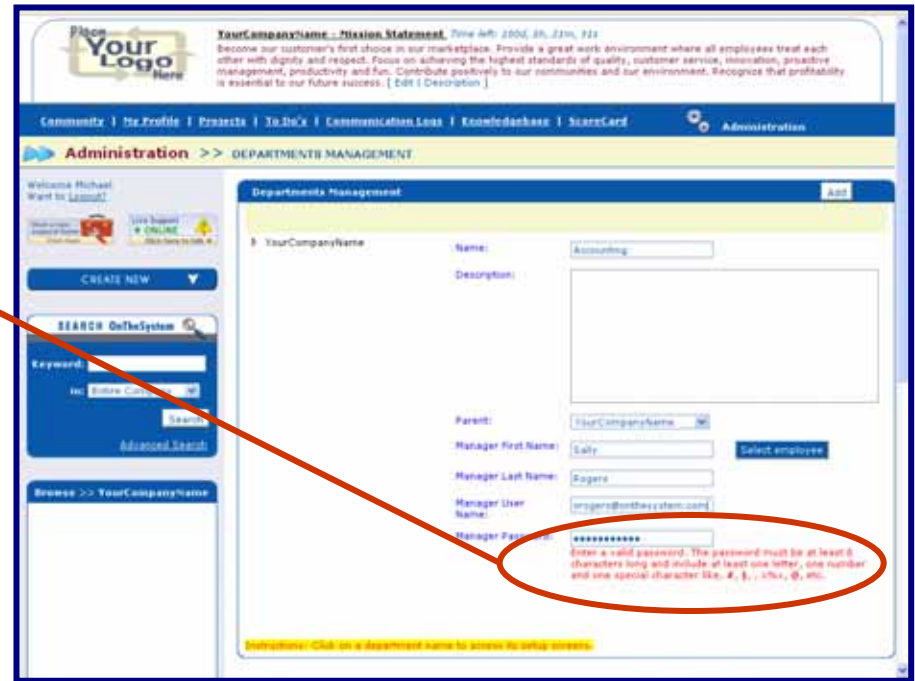
The "user name" must be the manager's active email account. OnTheSystem will use this email address to send automatic email notices including forgotten passwords, system messages and daily-reports, so it's important to input the user's most active email address.

The password must contain at least eight characters that includes at least one letter, number and special-character like a \$%of !

If you make a mistake, OnTheSystem will prompt you with instructions.

! PLEASE NOTE: The person you designate as manager will be given high level administrative permissions and complete access to all Employees, Roles, Projects, To Do, Communication Log Entries, KnowledgeBase articles, and administrative setup screens associated with the department.

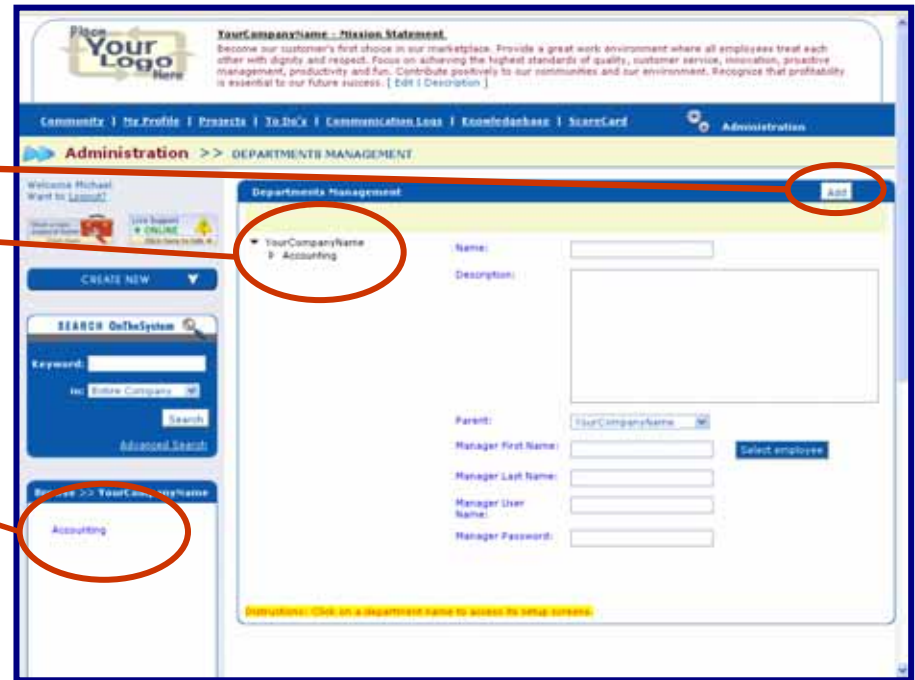
! For added security, both user name and passwords are case sensitive. This is important to remember when logging OnTheSystem.



When finished, click the add button. And watch what happens.

Your entry is saved and now appears in your department list to the left of the input fields.

It also appears in your Browse window.



Now, add all your remaining departments on-the-system.

Once complete, you can use the blue up and down arrows to change your department's relative position in your organizational structure.

Notice as you move your department up and down the list it also changes its position in your Browse Window.

If you want to make any changes, simply click on the department's link and its information populates all the fields.

Now you can change its name, update its description, assign a new manager, or reassign the department to a different parent.

So, you can see how easy it will be to modify your departmental structure at any time, as you see fit.

Save your changes by clicking on the "Update" button.

Alternatively you can click the "Delete" button if you want to delete the selected department or click the "New" button if you want to add a new department.

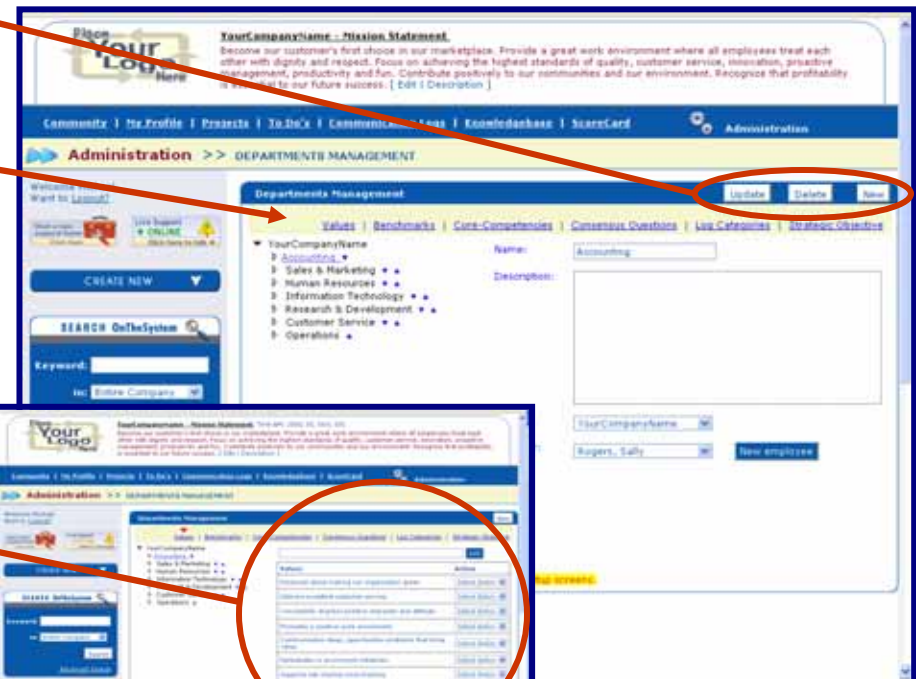
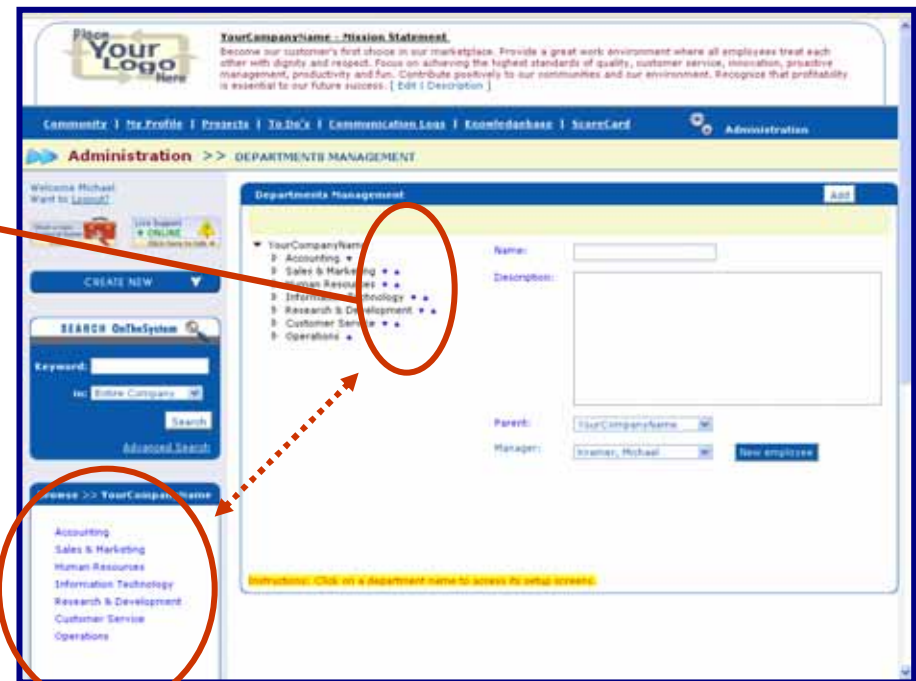
Also, notice that when you click on any department in your department list the department sub-navigation appears.

Now, you can access your organization's:

- Values
- Core-Competencies
- Consensus Questions AND
- Log Categories

For example, click on the values link.

Notice that your department inherited all the elements of the parent department ~ which in our case is the organization itself.



Don't worry. It's hard to make a mistake because you're not locked into the organizational structure that you create now.

Setup Your Employees OnTheSystem:

To add employees hold your mouse over the “Administration” tab and click on the “Employee Management” link.

You’re given instant access to the “Employee Management Screen.”

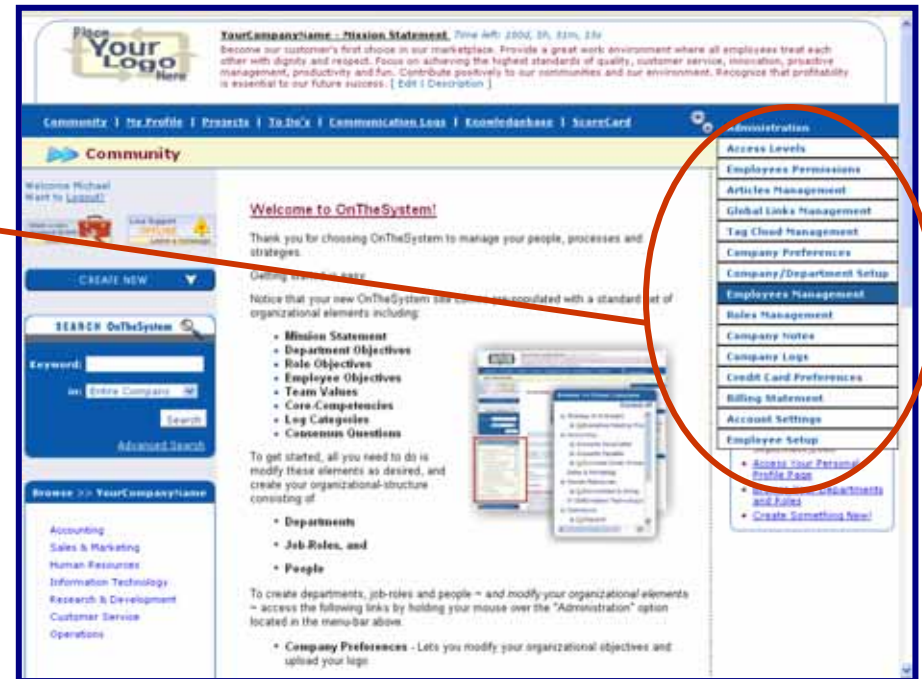
Now, refer to the Employee Worksheet that you prepared in Assignment #1 for the list of employees you will setup OnTheSystem.

You’ll need to assemble the following information:

- First name
- Last name
- Active email address

With your worksheet in hand, begin entering your employee’s information.

- 1 Start by entering the employee’s first name and last name.
 - 2 Next, use the department drop-down list to assign the employee to a department. Choose the department where the employee performs most of his or her work or where the employee’s performance-reviews are completed.
 - 3 Next enter the employees active email address. Remember this is the email address that the employee uses on a regular basis. It could be their company email or their current personal email address.
 - 4 Finish by creating a password for your employee. You can either click on the “Generate” password button or, if you prefer, enter an identical, unique password in both the password and confirm password fields. Remember, the password must be at least eight characters long and contain at least one letter, number and special character like a ?, # or *.
- The remaining fields can be completed by the employee.
- 5 Notice that your organization’s default employee objective, that you reviewed and customized on your Company Preferences Screen, automatically appears in the employee objective field. *Employee Objectives can be customized later by the employee and his or her supervisor to establish specific and measurable performance goals.*
 - 6 Once finished, scroll to the top of the form and click the “Add” button. The employee is saved and the screen clears for your next entry.



Now, scroll down to the bottom of the page. Your employee's name has been added to the employee list section.

Notice that the list is already populated with any department manager's names that you may have added when setting up your departments.

To edit any of the names, simply use the action drop down list and choose the edit option. The employee data populates the data entry screen at the top of the page.

Name	Department	Created	Action
Tom Adams	YourCompanyName	9/15/2008	Please select an action
Michael Kramer	Operations	9/15/2008	Please select an action
Sally Rogers	Accounting	9/15/2008	Please select an action Edit Deactivate Duplicate

! To deactivate an employee and terminate his or her access-permissions, select the deactivate option. The employee's data will be saved. To reactivate an employee, search for his or her name in the inactive employee section. This feature is useful for seasonal employees or an employee who is taking a leave of absence.

Employees Management

First Name: Sally Employee ID: []

Middle Name: [] Day Start: []

Last Name: Rogers Email Address: []

Alias: [] Home Street Address: []

Department: Accounting City: []

Company Email: [] State: []

Personal Email: [] Zip: []

DNS: [] User Name: srogers@yourcompany.com

HR#: [] Password: []

HR# ID: [] Confirm Password: []

Office Phone Number: [] Secret Word: []

Home Phone Number: []

Pager: []

Employee Objective: []



DEFINITION: A Role (or process) = A Bite Sized Chunk of Work

IMPORTANT: OnTheSystem uses the word role (or process) to refer to any “bite-sized chunk of work” performed and managed by a department. It does not matter if that work is a large or small “chunk.” What’s important is that you’re able to use your OnTheSystem KnowledgeBase to document the policies, procedures and training methods related to performing that “work.” So, when developing your list of “Roles” make sure you break down your department into “bite-sized chunks” of work that can be easily documented using your KnowledgeBase.

Also, please note, OnTheSystem does not create traditional “job-descriptions.” Instead it creates “role-descriptions.” This way every “chunk of work” (role) can be managed individually. This gives you greater organizational flexibility. It also promotes job-sharing and cross-training.

Think of roles as the building blocks of your organization. The stronger your roles (processes), the stronger your organization will become. One of the great benefits of using OnTheSystem is that it focuses your attention on continuously improving and documenting your company’s roles. OnTheSystem does this by:

- Getting you (and your employees) involved in using your KnowledgeBase to document the know-how of performing each role.
- Getting you (and your employees) participating in improvement projects designed to make each role more efficient and effective.

This benefits your organization AND your employees:

- It benefits your organization by helping make it scalable, so it can grow quickly while maintain your high standards of quality.
- It benefits your employees by making them easily promotable so they can grow along with your organization as they help it become more and more successful.

Setup Your Company’s Roles OnTheSystem:

To setup a Role (process) hold your mouse over the “Administration” tab and click on the “Roles Management” link.

You’re given instant access to the “Roles Management Screen.”



Refer to the Roles Worksheet that you prepared in Assignment #1 for the list of roles you will setup OnTheSystem.

The screenshot shows the OnTheSystem web application interface. At the top, there is a header with a logo placeholder and a mission statement. Below the header is a navigation bar with tabs for 'Community', 'My Profile', 'Projects', 'To Do's', 'Communication Logs', 'Knowledgebase', and 'ScoreCard'. The 'Administration' tab is highlighted, and a red circle is drawn around it. A red arrow points from the 'Roles Management' link in the 'Administration' menu to the text in the callout box. The main content area displays a welcome message and a list of organizational elements including Mission Statement, Department Objectives, Role Objectives, Employee Objectives, Team Values, Core-Competencies, Log Categories, and Consensus Questions. There is also a search bar and a list of departments and job-roles.

Now, you have access to a blank "Role Management" data entry screen."

Refer to the Role Worksheet that you prepared in Assignment #1 for the list of roles you will setup OnTheSystem.

You'll need to assemble the following information:

- Role Name - The name of the process
- Department - The department that performs the process
- Employee(s) - The employees who are authorized to perform the process.

With your worksheet in hand, begin entering your role information.

1 Use the Name Field to input a short, sound-byte name for the process.

2 Next, use the Managing Department drop-down list to select the department responsible for managing the process. Choose carefully because the process will appear in the "Roles" section of the selected department's profile page. The role will also appear under the selected department's name in the browse window. (Roles can be reassigned to different departments at any time.)

3 Next, use the role manager drop-down list to select your Role Manager. Keep in mind the person you select will be given administrative access to modify this Roles Management screen.

4 Next use the Role Status Drop down list to categorize the process as either standardized, in the process of being standardized, or not standardized. This designation is important because processes that are not properly standardized are usually too dependent on too few people who may be stuck in a "job trap" that prevents their easy promotion. This can impact employee satisfaction and retention. It can also impact the scalability and growth of your organization.

5 Next are the Keywords, Description and Strategic Objective fields. Skip these fields during setup. They're *optional and you don't want to get bogged down with details during setup.*

6 Notice that your organization's default role objective automatically populates the strategic objective field. Of course you can make any changes you want to the role's objective at any time. You will add specific and measurable goals when completing for your Silver GASBC award.



1

The last step is to identify the employees who you consider "Approved" to perform the process independently. You'll do this by transferring their name from the general employee list, on the left, to the "Approved Employee" list, on the right. Use the arrow buttons to transfer employees between boxes. Once approved, the process will appear in the "Approved Roles" section at the top of the employee's profile page.

2

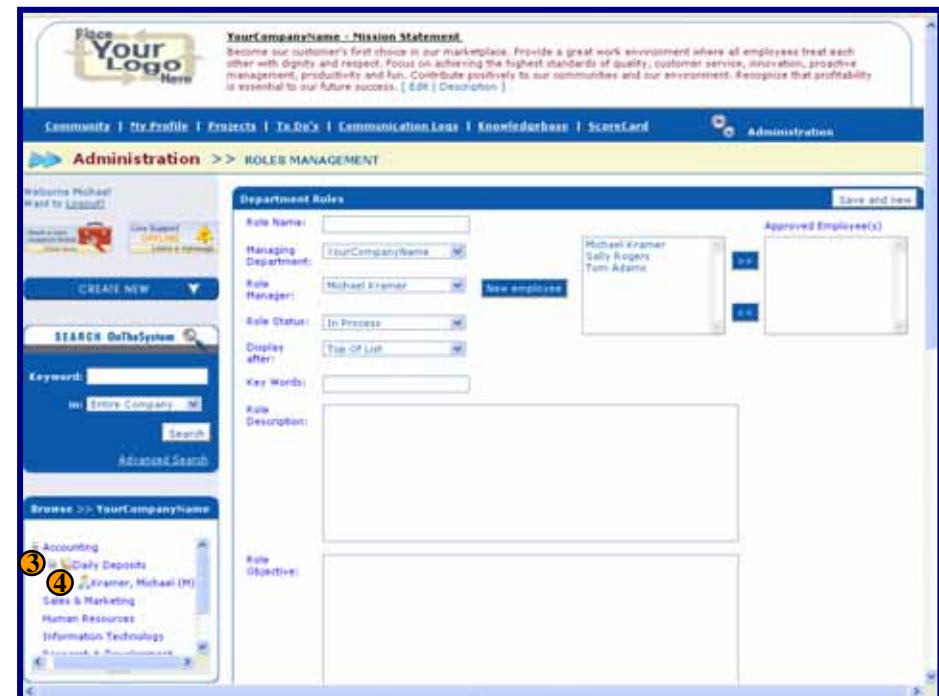
Click on the "Save and New" button to save your changes and clear the screen for another entry.

3

Once saved, the process will appear in the Browse window in your side navigation.

4

Notice that the approved employee's name(s) also appear.



Establishing a Role Manager is an opportunity to delegate management responsibilities to your organizations "expert" in performing the role (process):

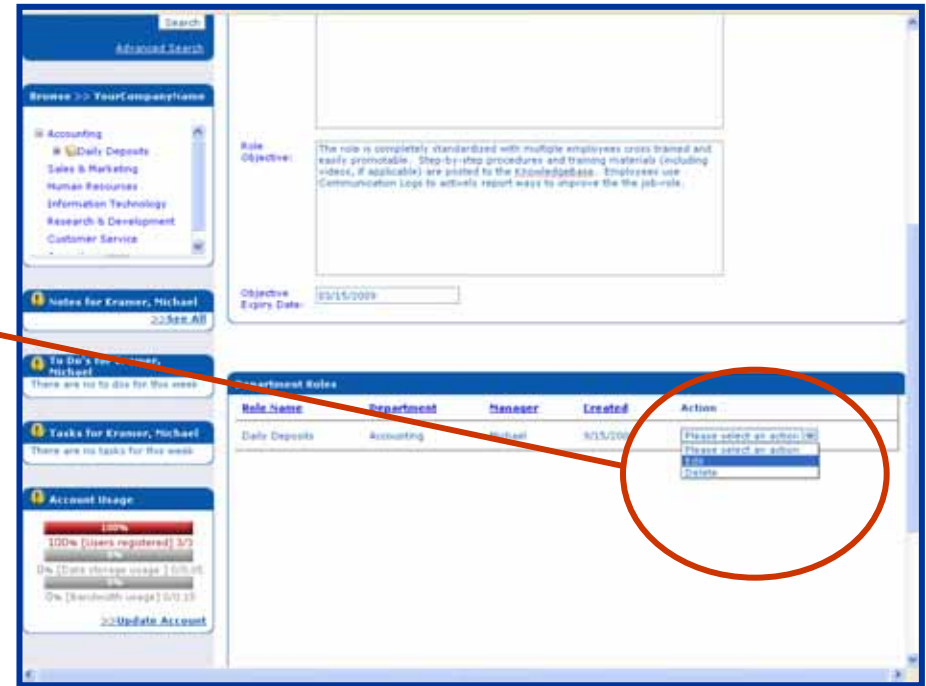
Manager Responsibilities include:

- **Writing a Role Description.**
- **Working with supervisors and team members to improve the Role's strategic objective.**
- **Training new staff to perform the process.**
- **Encouraging employees to learn the process.**
- **Documenting the best-practices of performing the process in your OnTheSystem knowledgebase.**
- **Responding to Communication Log entries that relate to the process.**
- **Initiating improvement projects designed to make the process more efficient and effective.**

Scroll to the bottom of your Role Management Screen.

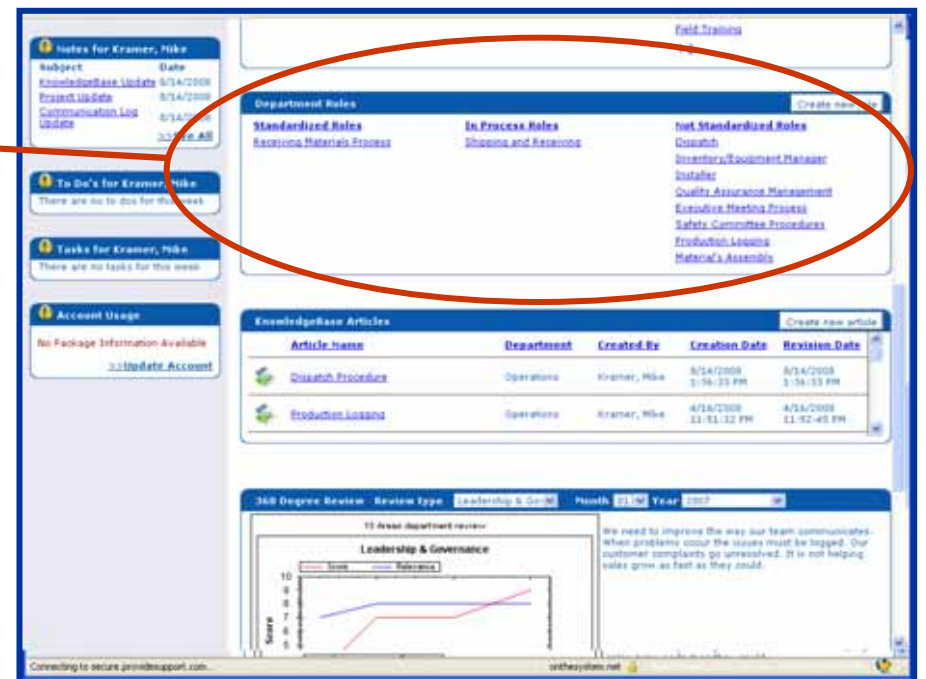
Saved roles, appear in the "Department Roles" list.

Use the action drop down list to review, edit or delete a role.



! Click on any column headings to sort a list. Click again to reverse the sort.

! The process appears in the roles section of your department's profile page. Notice how processes are categorized as standardized or not standardized. This should remind you and your team to use your OnTheSystem KnowledgeBase to begin documenting the know-how of performing each role.



😊 Well, that's it. You just completed setting up your company's structure. Use your Department, Role and Employee Setup screens to add, modify, or delete any element, as you see fit. As your business grows and evolves, OnTheSystem will grow and evolve with you. In fact, it should give you the insight you need to optimize your structure for peak performance.

Step Two - Going for Silver

Create Your Company's Management System

Silver Requirements: Use your OnTheSystem business development software to:

1. Develop your company's comprehensive Strategic Plan consisting of specific objectives and a series of projects designed to achieve your objectives in the time-frame you specify.
2. Create your company's "Book of Knowledge" (BOK). Your BOK should include policies, procedures, training materials and forms related to performing every operational role.

Four Silver Assignments:

- #1. Develop your strategic plan
- #2. Enter your objectives OnTheSystem
- #4. Enter your projects OnTheSystem
- #5 Create your Company's Book of Knowledge (BOK)

Why This Step is Important:

Business owners wonder why they cannot break through to their next level of success. They wonder why they have to work so hard. They wonder why it's so difficult to hire, train and manage employees.

The problem for most business owners is that they treat their business as a glorified hobby and not a solid company built for long-term success.

- They don't have a formal organizational structure.
- They don't have a clear strategic plan.
- They manage their projects in their heads.
- They don't document their processes.
- They don't have a program of continual improvement.

As a result, when their small business finally starts to grow, they suffer the traditional growing pains:

- Inconsistent quality
- Over dependence on key employees (who can quit and take the know-how of operating your business with them.)
- Dissatisfied customers
- Inability to break through to their next level of success
- Stress and aggravation

The Silver GASBC Award is designed to help you minimize your growing pains. It helps you build the management infrastructure your business needs to breakthrough from startup to going-concern.

By the time you achieve your Silver award you should have the infrastructure you need to:

- Free your time to work on your business and restore a healthy work/life balance.
- Have a saleable business model that can accommodate growth without sacrificing quality or service levels.
- Create a dependable team that knows how to work together.
- Free your employees from their "job traps" so they can be easily promoted.
- Increase the value of your business.
- Multiply the opportunity of all stakeholders including owners, employees and investors.

? TIP: Strategic Planning 101

Think of your strategic plan as your company's roadmap to success. It consists of two elements:

1. Strategic objectives
2. A series of related projects designed to achieve your objectives in a specified period of time.

Your OnTheSystem Business Development software uses your company's organizational structure to organize your strategic plan into four levels of inter-related objectives:

- o Company (Widest, mission view)
 - o Departments
 - Roles ("bite sized chunks of work")
 - Employees (Most narrow, tactical focus)

Each successive level provides a more and more narrow strategic focus. When viewed together they help bring your organization into strategic alignment.

Each objective is displayed in the masthead of the related element's Profile Page. This makes it very easy for you to navigate your OnTheSystem organizational structure and quickly understand how individual objectives relate to the broader strategic orientation of your organization. It's like a puzzle, with every piece falling into place.

Dense Company - Mission Statement, Time left: 3476, 29, 57m, 23s
Shift from profit per division to profit per customer. Increase sales 37%. Become our customer's first choice in our marketplace. Provide a great work environment where all employees treat each other with dignity and respect. Focus on achieving the highest standards of quality, customer service, innovation, proactive management, productivity and fun. [Edit | Description]

Decisions - Strategic Objective, Time left: 4726, 29, 5m, 89s
Reduce production costs 2%. Achieve zero safety incidents. All roles are completely standardized with employees cross trained and easily promotable. All employees participate in implementing the department's program of continual improvement. Employees actively report opportunities for operational development. The department work environment is characterized by open-communication, continual learning, cooperation, mutual respect and fun. [Edit | Description]

Dispatch - Strategic Objective, Time left: 4326, 19, 5m, 22s
Minimize wait times at distributor. Consolidate trips to reduce fuel consumption. Minimize errors and mix-ups. The role is completely standardized with multiple employees cross trained and easily promotable. Step-by-step procedures and trained materials (including videos) are posted to our Knowledgebase. Employees actively report ways to improve the operations of the job-role. [Edit | Description]

Kramer, Mike - Strategic Objective, Time left: 2324, 09, 59m, 27s
Assign department members to learn greater standardization techniques. Use the Knowledgebase to standardize one job role per month by writing, detailed, step-by-step procedure lists. Contribute at least one newsletter article per month to the OnTheSystem Blog. You are actively learning new job-roles as specified in your "training plan." You actively participate in implementing your department's improvement projects. You consistently report ideas, information, problems and opportunities that improve operations or add value to our organization. You contribute to our organization's Knowledgebase by creating or improving training materials related to the roles you perform. You promote our organization's values of open-communication, continual learning, cooperation, mutual respect and fun. [Edit | Description]

! Encourage employees to suggest ways to improve an objective by simply clicking the "edit" link. This provides all users with an equal opportunity to contribute ways departments, roles and employees can better serve the needs of the organization as a whole.

Suggestions are saved to a Strategic Planning log that's accessible to managers for review, edit and posting.

OnTheSystem leverages "Group Think" to bring your company's strategic planning to life. It makes strategic planning an ongoing, organic process which evolves naturally along with the organization.

? TIP: Strategic Planning 201

The easiest way to jump start your strategic planning process is to create two lists.

The first list should imagine your business as it could be if it were perfect:

- What quality levels do you want to achieve?
- What productivity levels do you want to sustain?
- What capabilities do you want to improve or add?
- What roles do you want to standardize so you can delegate your work to employees?

The second list should identify every error, inefficiency, system glitch, customer complaint or other problem that you want to resolve so that they can never happen again.

Once you have your master list, identify projects that can achieve or resolve each issue. A single project may resolve multiple issues. For example, improving the way employees perform a complex process may resolve many problems and achieve many quality objectives related to that process.

Your last step is to sort your projects in order of priority.



Displaying your strategic objectives
OnTheSystem has many benefits including:

- Transforms abstract “dreams” into achievable goals.
- Allows you to see the big picture.
- Motivates you to reach higher...and win-big faster.
- Lets you assess progress fairly and objectively.
- Encourages “group think”
- Leverage the insight and creativity of all participants.

Assignment #1: Develop specific and measurable strategic objectives for every department.

Use the following worksheet to map your company's objectives.

Once prepared, you will use your objectives to populate your OnTheSystem business development software.

Tip 1: Keep your Strategic Objectives as simple and achievable as possible. Set an achievement time-horizon of 12-18 months.

Tip 2: Don't stress!! Your objectives do NOT have to be perfect. They are meant to be a work in progress. You can change, improve or update them at anytime, on-the-fly once they are displayed OnTheSystem. What's important is that you start the process!

Tip 3: Once complete review all departmental objectives and determine if they are in alignment or conflict. Correct any inconsistencies. (For example, you cannot require your Accounting Department to supply you with comprehensive, real-time reporting if this type of reporting cannot be supported by your IT Department.)

Strategic Objectives- EXAMPLE

- Use this form to create a complete list of all your strategic objectives.
- Organize your list by department (use the departments managed OnTheSystem.)
- Your time horizon should be 12-18 months.
- Photocopy as many forms as you need.

Department	What Do You Want? or What Do You Want to Fix? (Objective)	How Are You Going to Get There? (Project(s))
Accounting	<ul style="list-style-type: none"> • Automate sales, accounts receivable, accounts payable and inventory control, using an integrated software program. • Have real-time access to key financial information. • Have real-time cash-flow management. • Delegate all data-entry to employees 	<ul style="list-style-type: none"> • Purchase an integrated accounting program. • Setup the program with company data. • Take classes to learn to use the program • Create training-videos for all data-entry functions.
Sales & Marketing	<ul style="list-style-type: none"> • Create website with shopping cart • Hire an independent sales team • Attend trade shows • Delegate paperwork • Automate responding to RFIs (requests for information) 	<ul style="list-style-type: none"> • Hire local collage students to create a website using a host service. • Advertise independent sales positions in three trade journals. • Identify local trade shows. • Create an exhibit booth. • Create a one-page brochure. • Create standardized prospecting forms that others can prepare. • Create a standard marketing kit that can be prepared in advance and sent out by employees as requests for information are received.
Human Resources	<ul style="list-style-type: none"> • Hire people who care about our company 	<ul style="list-style-type: none"> • Create a interview worksheet that lists the values of our companv.

! Use the blank "Objectives" worksheet on the next page! Make as many photocopies as you need.

! Contact your GASBC councilor or the GASBC if you need help developing your list of goals and projects.

Strategic Objectives

- Use this form to create a complete list of all your strategic objectives.
- Organize your list by departments
- Your time horizon should be 12-18 months.
- Photocopy as many forms as you need.

Department	What Do You Want? or What Do You Want to Fix? (Objective)	How Are You Going to Get There? (Project(s))

Assignment #2: Input your objectives OnTheSystem

Your company, department, role and employee Profile Pages are already populated with your company's general strategic objectives.

You reviewed and customized these general objectives when you completed the requirements for your Bronze Award.

Now, while preparing for your Silver award you need to update individual objectives with specific and measurable goals.

You should not replace your existing default objectives but rather you should append one or two sentences that describe your specific goals to the front of each general objective.

For example, your default general objective for a department is as follows:

All roles are completely standardized with employees cross trained and easily promotable. All employees participate in implementing the department's improvement projects and to-do's. Employees actively use the Communication Logs to report ideas, problems and other information. The department work environment is characterized by open-communication, continual-learning, cooperation, mutual-respect and fun.

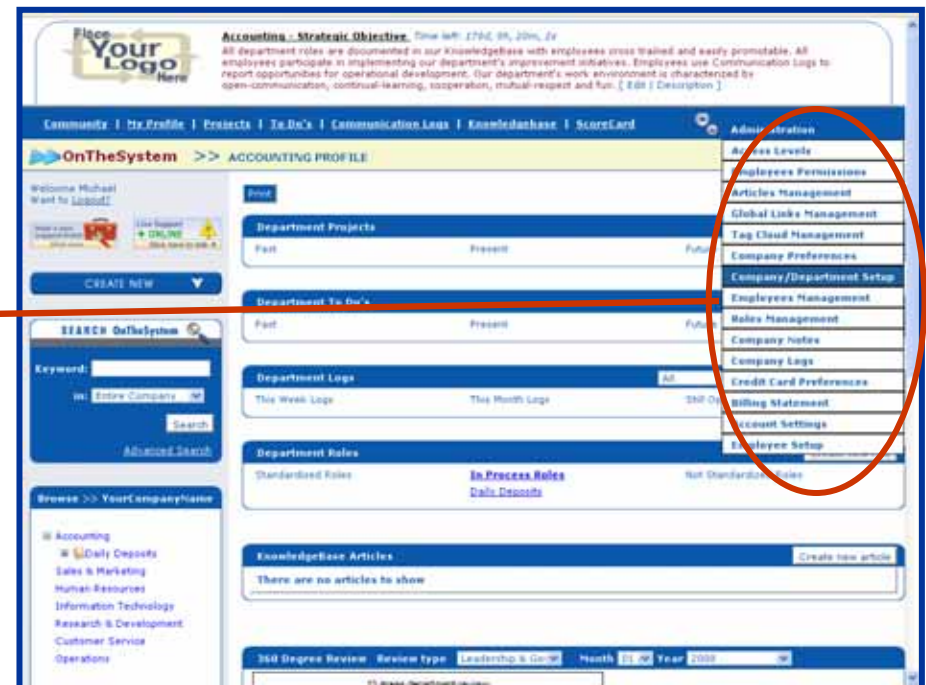
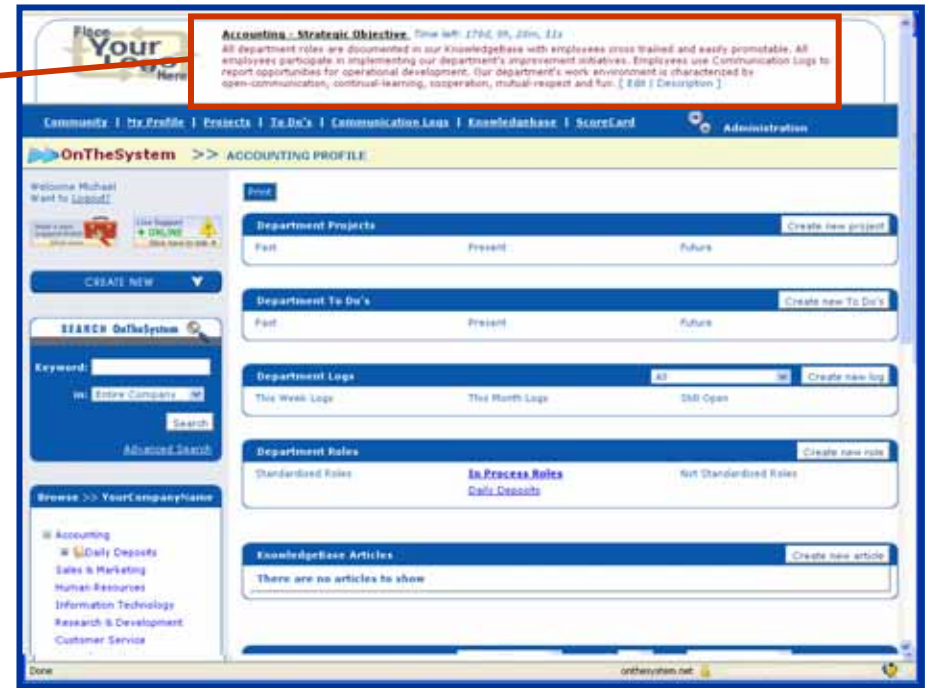
Now, use your OnTheSystem software to enhance the default objective with the specific and measurable goals related to each individual role. An example for an updated operations departmental objective might look like:

Increase output by 125 units per day. Reduce defects to 5 units per day. Reduce operating costs by 5%. All roles are completely standardized with employees cross trained and easily promotable. All employees participate in implementing the department's improvement projects and to-do's. Employees actively use the Communication Logs to report ideas, problems and other information. The department work environment is characterized by open-communication, continual-learning, cooperation, mutual-respect and fun.

To update a strategic objective simply hold your mouse over the "Administration" tab and click on one of the following links:

- Department/Company Setup
- Role Management
- Employee/User Management

Review the following two pages for step-by-step instructions on how to modify a company/department and role strategic objective.



Update Your Company or Department Objectives:

To update your company mission statement or a department objective hold your mouse over the "Administration" tab and select the "Company/Department Setup" link.

Then use the organizational list provided to select the company or department that you want to modify.

Select the Company Name (the top link) to modify your company's Mission/Vision Statement.

Or, select a Department Name to modify its Strategic Objective.

Once you click on a department the sub-navigation bar will appear.

Now click on the Strategic Objective link located at the far right hand of the sub-navigation bar.

Edit the objective text box. When finished click the "Save" button.

A message box will appear telling you that your modifications were saved.

When you return to the department's strategic objective screen you will see your updated strategic objective. Past objectives will appear in the log located at the bottom of the page. Restore older objectives using the Action drop-down list.

Click on the department's name in the Browse Company window and you will see your new objective displayed in the masthead of its profile page.

The screenshots show the following steps:

- Step 1:** The 'Administration' tab is selected in the top navigation bar.
- Step 2:** The 'Company/Department Setup' link is highlighted in the sub-navigation bar.
- Step 3:** The organizational list is shown, with a company or department name selected.
- Step 4:** The 'Strategic Objective' link is highlighted in the sub-navigation bar.
- Step 5:** The 'Save' button is highlighted in the bottom right corner of the objective editing form.
- Step 6:** The updated objective text is shown in the masthead of the department's profile page.

Update Role Objectives:

To update a role objective hold your mouse over the “Administration” tab and select the “Role Management” link.

You’re given access to a blank “Role Management” screen.

Then scroll down to the bottom of the page and locate the process you want to modify in the Role list.

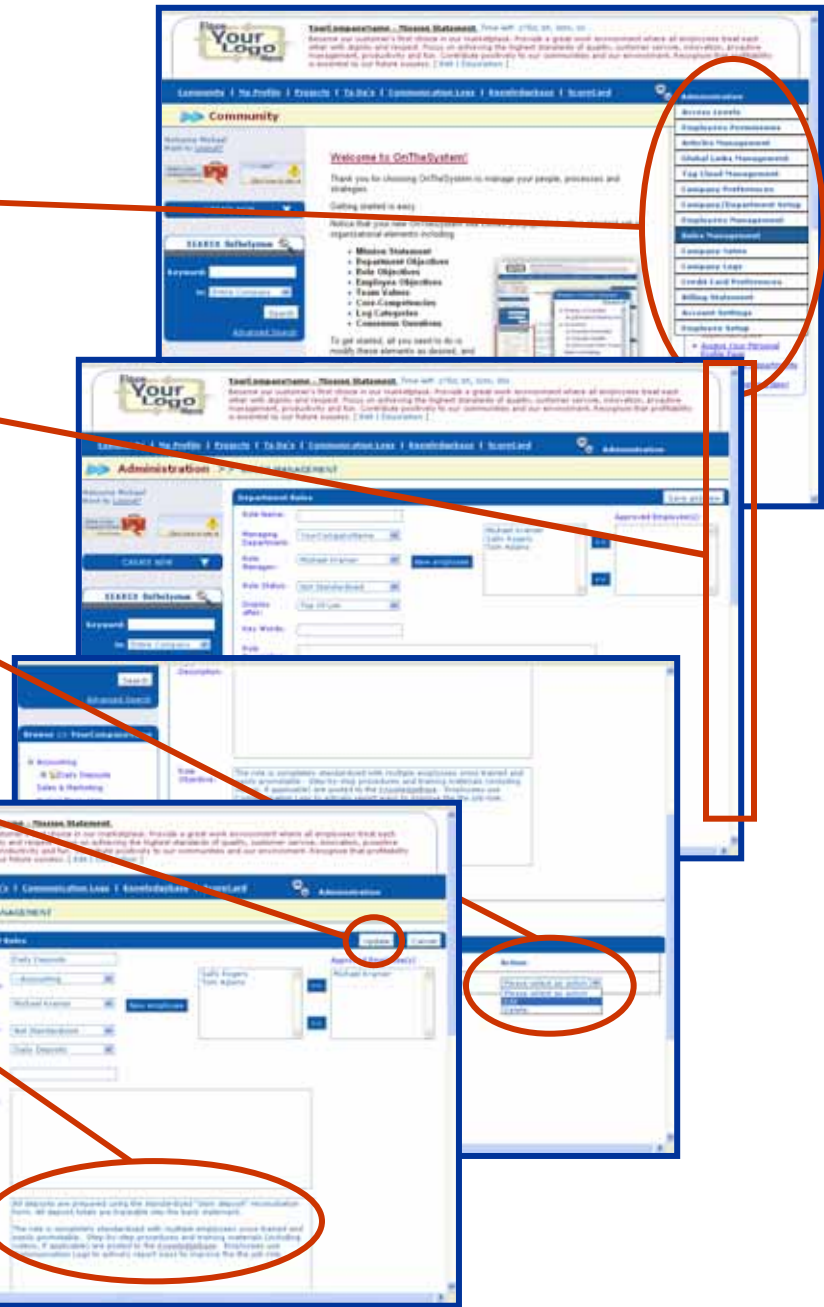
Once found, use the action drop-down list and select the edit option.

The process, including its current strategic objective, will populate the data entry screen above.

Edit the role’s objective with your specific and measurable goals. When finished click the “Update” button.

The Role Management screen will clear.

Click on the role’s name in the Browse Company window and you will see your new objective displayed in the masthead of its profile page.



Update Employee Objectives (Optional): To update an employee objective hold your mouse over the “Administration” tab and select the “Employee Management” link. Then scroll down to the bottom of the page and locate the employee you want to modify in the Employee list. Once found, use the action drop-down list and select the edit option. Your employee’s data, including its current strategic objective will populate the screen above. Make the changes you want and click on the “Update” button.

Assignment #3: Setup your projects OnTheSystem

Your company's Strategic Plan is made up of:

- Strategic Objectives, and
- Projects

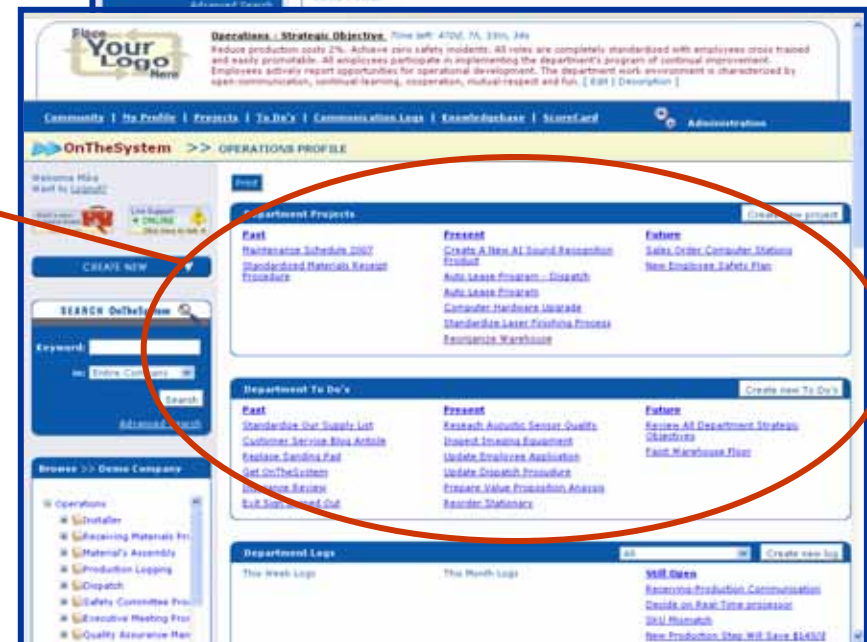
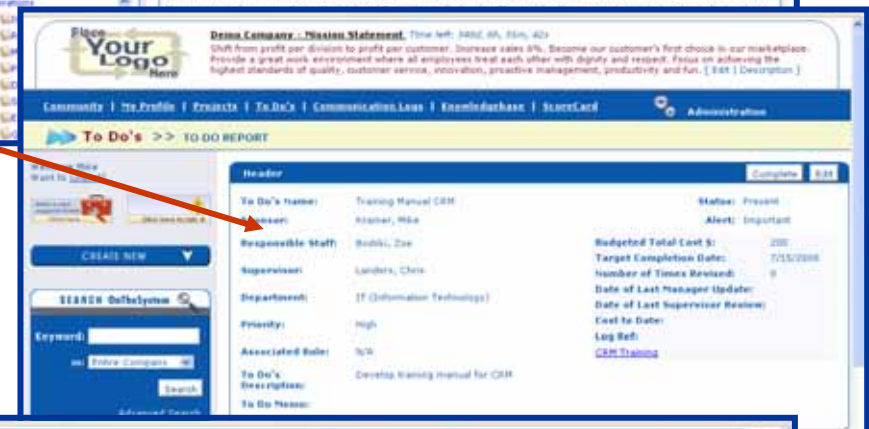
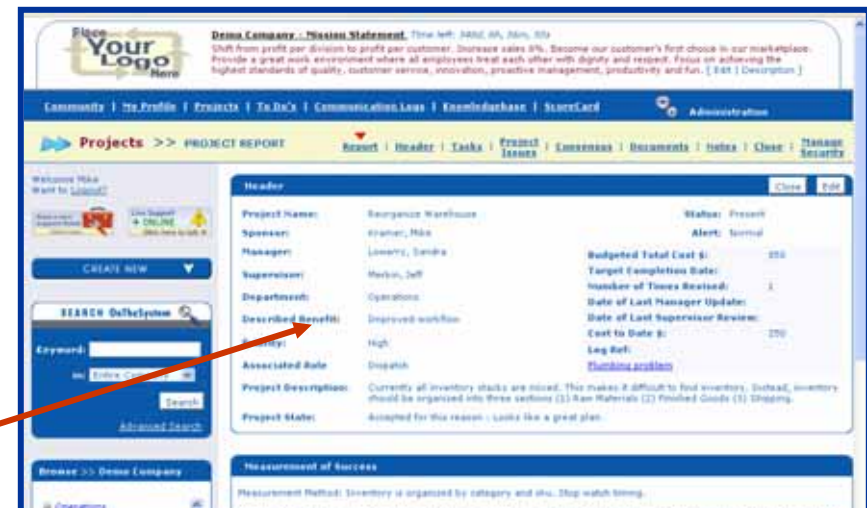
Your Strategic Objectives define, "What you want." Your Projects define, "How you are going to get there." Together, objectives and projects represent your company's "strategic path" to success.

Your OnTheSystem business development software comes with two project management tools: Projects and To-Dos.

- Use your "Projects" tool to create and manage projects that require multiple steps and/or multiple participants.
- Use your "To-Do" tool to manage "mini projects" that only require one step and involve only one person.

Both your "Projects" and "To-Do" tools let you assign projects and to-dos to a specific department and role.

Once created, projects and to-do's appear in the respective sections of their related department, role and employee profile pages.



! OnTheSystem Profile Pages display both objectives and projects. This provides a visual representation of your organizations "strategic path" to success. All it takes is a quick comparison of the objective with the related projects to assess the logic and completeness of your strategic path.

! Include improvement projects designed to improve processes that are inefficient or that result in inconsistent quality.

Also, include a number of projects that are intended to document the know-how of performing key roles that you would like to delegate to subordinates.

Setup Your Projects and To-Dos:

To create a project or to-do hold your mouse over the "Create New" tab and select the "Project" or "To-Do" option.

The screenshot shows the 'Community' page of the OnTheSystem interface. At the top, there is a navigation bar with links for 'Community', 'My Profile', 'Projects', 'To-Do's', 'Communication Logs', 'Knowledgebase', and 'ScoreCard'. Below the navigation bar, the 'CREATE NEW' menu is highlighted with a red circle, and an arrow points to the 'Project' option. The page also features a 'Welcome to OnTheSystem!' message, a 'Getting started' section, and a list of organizational elements to be configured, such as Mission Statement, Department Objectives, Role Objectives, Employee Objectives, Team Values, Core Competencies, Log Categories, and Consensus Questions. A 'Web Quick Links' section is visible on the right side of the page.



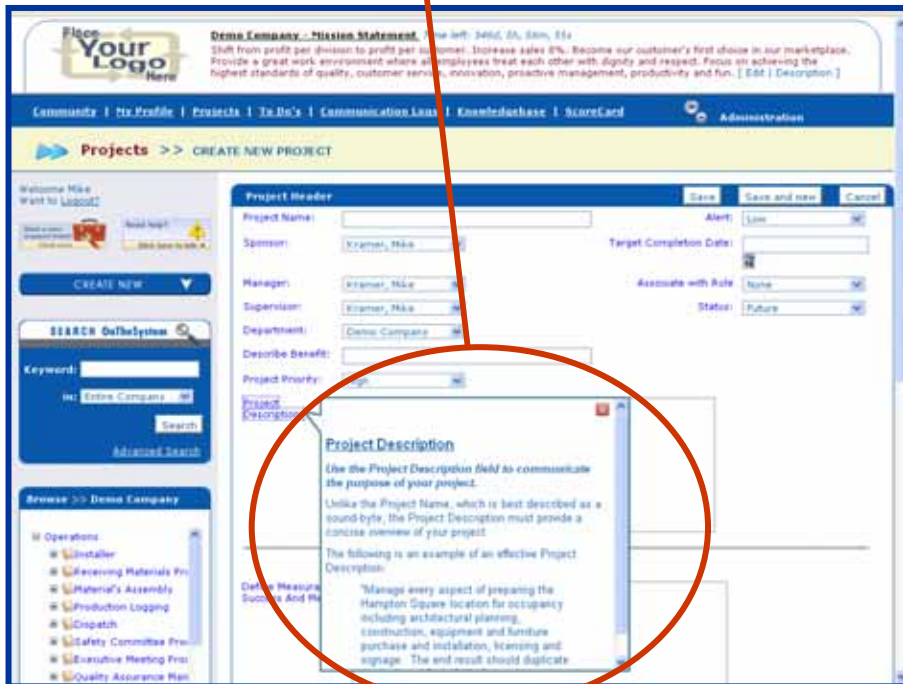
Once selected you are given access to a setup screen. Then, let the screen elements guide you.

The screenshot shows the 'CREATE NEW PROJECT' setup screen. The 'Project Name' field is highlighted with a red arrow. The screen includes a 'Project Header' section with various input fields, including 'Project Name', 'Sponsor', 'Manager', 'Supervisor', 'Department', 'Describe Benefit', 'Project Priority', and 'Project Description'. There are also dropdown menus for 'Alert', 'Target Completion Date', 'Associate with Role', and 'Status'. A 'Define Measurable Success And Method' section is visible at the bottom of the screen.



If you need help, click on any of the field descriptions. A help window will appear with instructions and examples.

(To close the help window, scroll to the top of the pop-up window and click on the red "x.".)



Visit www.OnTheSystem.com/UserGuides for free Project Management and To-Do user guides.



Finally, a word of caution: You must manage all strategic improvement projects and to-dos OnTheSystem.

If you fail to create even one strategic initiative OnTheSystem then your Strategic Plan will be incomplete and you will have a difficult time assessing its logic, completeness and your company's progress.

Examples of strategic improvement projects include:

- Designing a new brochure
- Reorganizing your warehouse
- Standardizing a role
- Opening a new location

You want ALL improvement projects documented OnTheSystem for six key reasons:

1. Even one missing project or to-do diminishes the value of your Department Profile Page as a one-page strategic plan.
2. Managing your projects and to-dos OnTheSystem helps your initiatives come in, on-time and on-budget and fulfilling their intended purpose ~ *the first time around*.
3. Your project and to-do systems help develop leadership skills.
4. All projects, to-dos and related communications are retained OnTheSystem for future reference. This creates a valuable reference of what worked (and what didn't work) for future teams. This historical archive adds value to your business.
5. Creates a positive team-culture that encourages everyone to get involved improving your company.
6. Helps increase your company's sales value by giving prospective buyers confidence that they can refer to your company's historical archive of projects, to-dos and other features like communication logs and KnowledgeBase entries.

Example: Step-by-Step Procedures or White Paper

Assignment #4: Create Your Company's Book of Knowledge (BOK)

Your OnTheSystem Business Development Software comes with a built-in knowledgebase that makes it easy to create your company's Book of Knowledge (BOK).

Think of your BOK as your company's owner's manual. It should contain every policy, procedure, form, document, training video, and other material needed to run your business.

Ultimately, your BOK should be so complete that your company's day-to-day operations no longer depend on you or any specific employee. Instead, your ongoing operations should depend on well documented roles that are managed by well trained and easily promoted (or replaced) employees.

Having a well documented BOK benefits you, your employees and your company:

- It helps transform your business from a start-up to a going-concern.
- It gives your business new life and new value.
- It helps create a positive team-culture that's based upon best-practices.
- It frees your best employees for promotion.
- It helps free your time to build your business and enjoy your life.

Most important, a well prepared BOK makes it easier for your company to grow quickly without sacrificing the quality of your products and services.

Use your OnTheSystem KnowledgeBase to create your BOK:

- Use the integrated word-processor to write step-by-step procedure lists.
- Upload documents or files from your computer's hard-drive.
- Embed mpeg, flash or You-Tube type video files.



You can create an unlimited number of KnowledgeBase entries. Each entry can be assign to a specific department and role. Once created, your entry will appear in the KnowledgeBase sections on the related department's and role's profile pages.

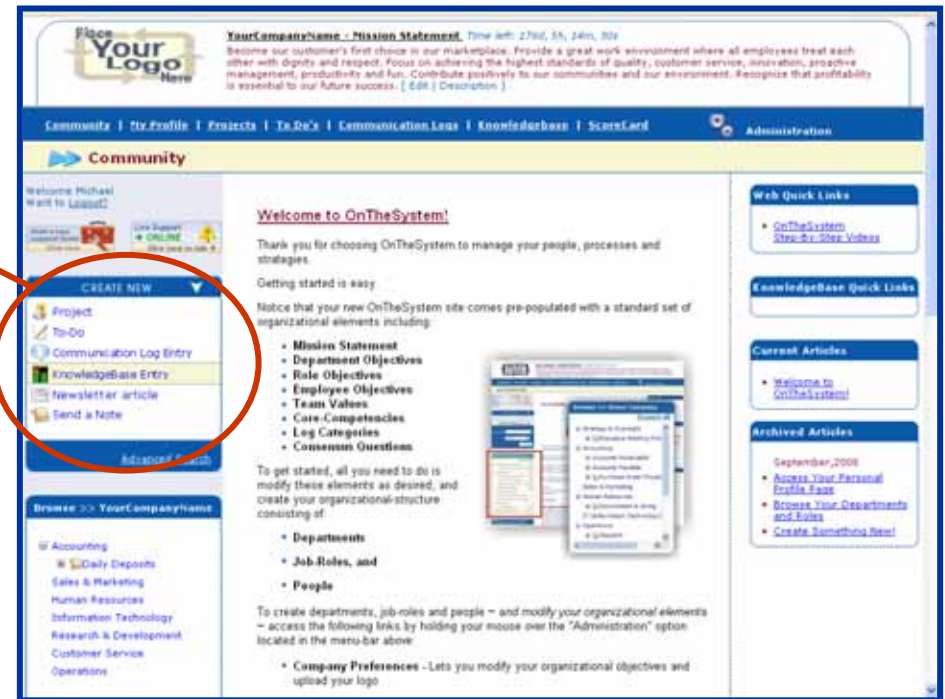


Example: Training Videos

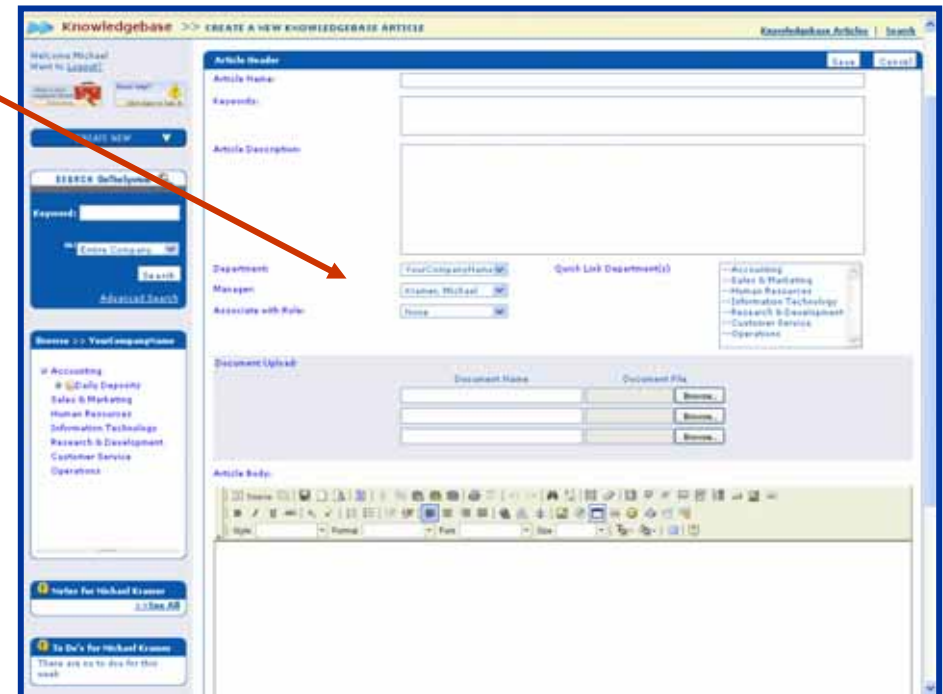


Create a KnowledgeBase Entry:

To create a KnowledgeBase entry hold your mouse over the "Create New" tab and select the "KnowledgeBase" option.



Once selected you are given access to a setup screen. Then, let the screen elements guide you.



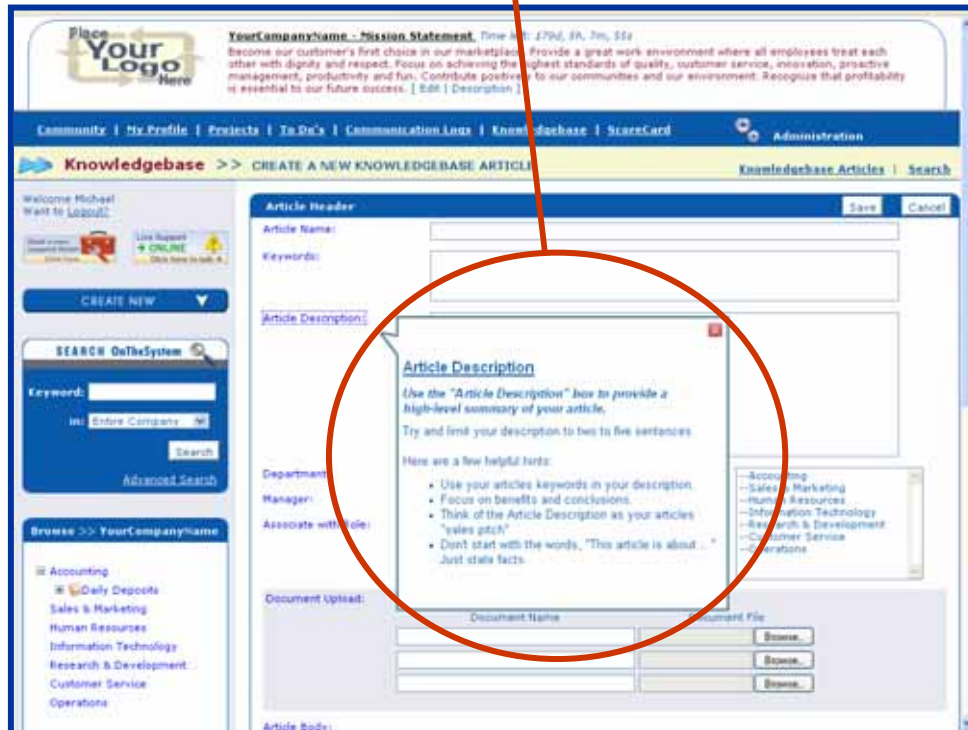
If you have employees, we encourage you to get your entire team involved preparing your BOK. For example, you can assign your employees projects or to-do's related to documenting the know-how of the roles they perform.

Your employees should be eager to help. Like you, they want to maximize their opportunity. They realize they cannot advance in your company if the roles they perform are too dependent on them. They will want to free themselves from their "job traps" so they can assume new responsibilities and grow with your company as it grows.



If you need help, click on any of the field descriptions. A help window will appear with instructions and examples.

(To close the help window, scroll to the top of the pop-up window and click on the red "x.").



TIPS:

Tip #1: Preparing your BOK can be overwhelming to start. You have so many roles and so little time. Your best approach is to simply start the process. Your BOK does not have to be perfect to start. Over time, your BOK will get better and better. However, by delaying, you do yourself, your employees and your business a terrible disservice. Start by simply outlining the steps of a process. Add more detail later.

Tip #2: GASBC Silver Award does not require your BOK to be perfect. We are simply looking for a good start. Every role will need to be documented to a basic extent. When competing for your Gold Award you will continue to improve your BOK.

Tip #3: Prioritize which roles to begin documenting first. It may be best to start by documenting easy processes first.

Tip #4: If a role seems too complex consider breaking it down until the process seems easy to document.

Tip #5: If you don't want to write a step-by-step procedure list, consider making a short video of yourself or your employee performing the role. While filming, describe the role as if you were explaining it to a trainee. Keep the videos short. They should not exceed ten minutes. They don't have to look good, they just have to do a good job explaining the process. Then upload the video to your KnowledgeBase. You can create an entire online how-to video library for operating your business.

Tip #6: Ask for help. Your GASBC counselor can offer templates and other resources that can help you document your roles.



Visit www.OnTheSystem.com/UserGuides for a free KnowledgeBase user guide.

How to write a step-by-step procedure:

The easiest way to document a process is to prepare a simple, step-by-step, procedure list. Use the number-outline format. That way you can breakdown larger steps into smaller components. For example:

1. Step One: xxxx
2. Step Two: yyyy
 - a. Sub Step a
 - b. Sub Step b
 - c. Sub Step c
3. Step Three: zzz

Adopt a consistent format. This makes it easier for employees (or future employees) to become familiar with your BOK. For example, consider the following format. It includes two sections: Header and Procedure-List.

The header can include the following basic elements (Modify the list by adding or removing elements to fit the needs of your company):

- Process (Role) Name:
- Description:
- Quality Objective:
- Related Forms:
- Training Methods:
- Prerequisites:
- Related Materials:
- Requirements:
- Safety:
- Exceptions Handling (issue and related response):
- Definitions:
- Approved By and Date

The Procedure-list should be a simple outline that:

1. Describes the step.
2. Indicates your quality objective
3. Cautions user to avoid known or anticipated problems

EXAMPLE ~ Header:

- **Process (Role) Name:** Pre-heat ovens procedure
- **Description:** Baking ovens need to pre-heat for 30-minutes prior to initiating a baking cycle. Turn on the ovens immediately upon entering production room at the beginning of the first production shift. Oven temperature should be set at 350 degrees. Baking should not occur until temperature is confirmed.
- **Quality Objective:** Ovens are at the appropriate temperature to begin production at the beginning of the first production shift. Baking does not occur if the ovens are not at the appropriate temperature.
- **Related Forms:** Daily Shift Temperature Logs
- **Training Method:**
 - **Prerequisites:** Apprentice baker for a minimum of 6 months
 - **Related Materials:** Recipe temperature guides
 - **Requirements:** Safety training
- **Safety:** Oven and baking equipment can be hot. All personnel should take precautions to prevent burns.
- **Exceptions Handling (issue and related response):**
 - **Simple Burn:** Use the burn first-aid kit located in the break room on the SE corner (beside the water cooler). Contact the shift supervisor. Document the incident.
 - **Serious Burn:** Call 911.
- **Definitions:**
 - **Viking:** Name of oven manufacturer
- **Approved By and Date:** Bill Smith 12/31/2007

The Procedure-list should be a simple outline. Notice how each step starts by describing the required work and then indicates the quality purpose (or reason for the step) and cautions the reader to avoid problems:

1. Turn on the production room lights. You will need adequate lighting to see the temperature gauges. Be sure you have adequate light because the dials can be hard to read in dim light.
2. Lift the temperature dial cover. The temperature dial cover should always be closed when not setting the dials. This prevents accidental temperature changes caused by brushing up against the dials. Be careful the cover may be hot.
3. Set the temperature to 350 degrees. 350 degrees is our minimum baking temperature. It takes less time to heat an oven than to cool the oven so setting the temperature above 350 degrees can delay the start of the production day if the first scheduled item requires 350 degrees but you set the oven above 350 degrees.
4. Close the temperature dial cover. The temperature dial cover should always be closed when not setting the dials. This prevents accidental temperature changes caused by brushing up against the dials. Be careful the cover may be hot.
5. Sign the daily temperature log. This indicates who performed the temperature setting procedure. If there is a problem the responsible party can be easily consulted.

CONGRATULATIONS

The hard work is done!

You used your OnTheSystem Business Development Software to create a scalable organizational structure consisting of departments, roles and employees.

You created a “living” strategic plan consisting of objectives and projects designed to achieve your objectives within a specific period of time.

Most important, you began preparing your company’s Book of Knowledge (BOK) using your OnTheSystem KnowledgeBase.

At this point you should feel more organized, confident and in control of all the moving parts of your company. You should feel less stress. You should feel better prepared for unexpected opportunities and threats. Your company may already be growing.

Now, to earn your Gold Award you will “perfect” your BOK and you will learn how to use your OnTheSystem software to manage your business.

Step Three - Going for Gold

Using Your Company's Management System

Gold Requirements: Use your OnTheSystem business development software to:

- Actively implement your strategic plan.
- Perfect your “Book of Knowledge” (BOK) until you achieve the following milestones:
 - Operations are scalable. This means your company is prepared to grow quickly while maintaining quality and service levels.
 - Roles are easily delegable. This means roles are not dependent on specific employees but on strong systems.
 - Employees are free from their “job traps” and can be easily promoted.
- Manage meetings (Using the Department Profile Page)
- Manage continual improvement (Using the Role Profile Page)
- Manage employees (Using the Employee Profile Page) if applicable

Four Gold Assignments:

- #1. Actively Implement Your “Living” Strategic Plan
- #2. Perfect your Book of Knowledge (BOK)
- #3. Manage your company using your profile pages
- #4. Manage continual improvement using role profile pages
- #5. Manage employees using their profile pages

Why This Step is Important:

The GASBC Gold Award is designed to strengthen your leadership and management skills.

In the coming months and years you will likely hire many employees. Having strong management systems will help you maintain your “small business” culture as your company grows. It will also help you maximize the value received from your most valuable and expensive resource ~ your people.

The key ingredient to establishing a positive company culture is establishing open lines of communication. Your employees may be truly outstanding, but as good as they may be, they can't read your mind. If you cannot communicate what you want in a clear and measurable format your employees will have a difficult time meeting your expectations.

Your employees also need ways to communicate what they know about your business and industry. Your employees speak to your customers. They negotiate with your vendors. They operate your expensive equipment. They know what works and what's broken. As a result, your employees often have a better idea how to “fix” your business and maximize your opportunity than you do.

It's to your advantage to have ways to listen to your employees. You need to know what they know to make good strategic decisions.

Employees and employers (and supervisors) need a shared language that promotes mutual understanding and effective communication.

During the Gold Challenge you will learn how to use your OnTheSystem Business Development Software to create your company's unique management language where everyone involved in your company uses the same tools to:

- Set expectations
- Create strategies
- Manage projects
- Share ideas
- Resolve problems
- Document best-practices
- Pursue continual improvement
- Assess progress
- Manage meetings

Your objective is to create a powerful team language that results in open lines of communication, maximum collaboration and a positive team-culture. Your OnTheSystem software (tools and profile pages) develop the leadership skills of all users. It helps create your company's scalable leadership infrastructure early in your company's life-cycle so you're prepared for unexpected opportunities and rapid growth.

Assignment #1: Actively implement your “living” Strategic Plan

When preparing for your Silver Award you established a “living” strategic plan consisting of objectives and projects designed to achieve your company’s objectives.

These objectives and projects are displayed in the profile pages related to your company’s departments, roles and employees.

Use your company’s Browse window for one-click access to any profile page and its strategies, projects and other related elements.

During the Gold Challenge you should use the profile pages to manage your strategies:

- Click on the “edit” link located along-side any strategic objective and suggest a way to strengthen or clarify the objective.
- Actively use your project and to-do management tools to implement your strategies.

Do not become complacent or lose focus. Use your OnTheSystem business development software to create and monitor your company’s overall strategies the same way you use your accounting program to manage your company’s finances.

If you are a very small company with only one or two employees you already know that the hardest person to manage is yourself. Use your OnTheSystem software to hold yourself accountable for breaking through to your next level of success as quickly as possible.

! Use OnTheSystem to structure meetings with your GASBC counselor:

- Review Department, Role and Employee profile pages.
- Discuss objectives and projects that are working or not working.
- Review Communication Log entries that may impact your Strategic plans.

Example: Step-by-Step Procedures or White Paper

Assignment #2: Perfect your company's Book of Knowledge (BOK)

Your company's Book of Knowledge" (BOK) will never be 100% complete. Like your strategic plan, your BOK is a "living" document that must evolve along with your business and marketplace.

For the purposes of preparing for your Gold Award your BOK must reflect current best-practices and achieve the following milestones:

- Operations are scalable. This means your company is prepared to grow quickly while maintaining quality and service levels.
- Roles are easily delegable. This means processes are not dependent on specific employees but on strong systems.
- Employees are free from their "job traps" and can be easily promoted.

Create projects and to-dos designed to manage the development of your BOK. Whenever possible, assign these projects and to-dos to your role-managers. This helps create a company culture centered on:

- Documenting best-practices
- Continual improvement
- Promoting job-sharing, cross-training and promoting from within

It also trains your employees in the methods you use to document processes.



Example: Training Videos



Contact your local GASBC or the GASBC for classes designed to help you learn how to create your BOK and document best practices.

Assignment #3: Manage your company using your Department Profile Page

Your OnTheSystem Department Profile page is a one page strategic plan for your department. It performs two important functions.

- It provides convenient, one-click, access to your department's projects, to do's, and log entries, KnowledgeBase articles, roles, etc.
- It's a powerful performance management tool that lets you and your employees work together to define expectations and evaluate progress in a completely fair, open and democratic way.

All it takes is a quick review to assess the veracity of your strategic plan, consider new information and judge progress. Click on any project, to-do or communication log link to drill down and manage the details.

Your OnTheSystem Department Profile page includes the following elements:

- 1 Strategic Objective** - Prominently displayed in the masthead.
- 2 Projects & To Dos** - Presents a "strategic path" comprised of past, present and future initiatives designed to achieve your stated strategic objective.
- 3 Communication Logs** - Issues and ideas logged by employees. Items are sorted into three categories: New this week, new this month and still open. Use this section to keep your strategic plan updated. Click on any issue's link to contribute your insight into resolving the item. If necessary, issues can be converted into projects or to-dos.
- 4 Roles** - This section lists the roles that are managed by the department. Roles are sorted into three categories: Standardized, In Process (of being standardized) and Not Standardized. This section is intended to motivate your department to complete your company's BOK. Roles that are identified as "not standardized" require attention.
- 5 KnowledgeBase Articles** - This section lists all KnowledgeBase articles and documents associated with your department.

As you navigate your Department Profile page consider ways to improve strategic objectives, add or modify projects and respond to information logged on-the-system.

The screenshot shows the OnTheSystem Department Profile page for the 'OPERATIONS PROFILE'. The page is divided into several sections, each highlighted with a numbered callout:

- 1 Strategic Objective:** Located at the top, it displays a strategic objective: "Reduce production costs 2%... Achieve zero safety incidents... All roles are completely standardized with employees cross trained and easily portable..."
- 2 Projects & To Dos:** This section is divided into three columns: 'Past', 'Present', and 'Future'. It lists various initiatives such as 'Maintenance Schedule 2007', 'Create a New, 30 Second Reassembly Process', and 'Safety Program - Develop New Safety Program'.
- 3 Communication Logs:** This section shows a list of communication logs, including 'This week logs', 'This month logs', and 'Still Open' items like 'Review Production Communication Schedule on New Time Allocation'.
- 4 Roles:** This section lists roles categorized into 'Standardized Roles', 'In Process Roles', and 'Not Standardized Roles'. Examples include 'Maintenance Schedule Process' and 'Safety Program Manager'.
- 5 KnowledgeBase Articles:** This section displays a table of articles with columns for 'Article Name', 'Department', 'Created By', 'Creation Date', and 'Release Date'. Articles listed include 'Standard Procedure' and 'Production Layout'.

At the bottom of the page, there are two charts: 'Leadership & Governance' and 'Monthly Sales', both showing data trends over time from December 2006 to December 2007.

Use Your Department Profile Page to Manage Meetings

If you have employees, use OnTheSystem to transform project, department and executive meetings (online or in-person) into short, structured and substantive accountability sessions.

For example, try the following format to structure an executive or partner's meeting where each department leader takes a turn reviewing their respective department profile pages.

1. The Department Manager starts by reviewing selected Communication Log entries:

Limit discussion to significant new problems, idea, and other information logged OnTheSystem.

Consider ways the issues may impact the department's Strategic Objective.

Do not discuss logged items that are not considered overly important. These lesser issues should be discussed/resolved using the "virtual meeting room" of the related Communication Log entry or one-on-one with the team member(s) who logged or can resolve the item.

2. The Department Manager continues by reviewing progress related to key department projects:

The Department Manager asks each project manager (PM) to give a quick update on active projects. The PM identifies successes, problems, missed due-dates, over/under budget items, etc. They also identify solutions to problems, if any. All participants should have an opportunity to comment and ask questions.

If a project is on time, on budget and expected to fulfill its intended purpose the project should not be discussed at length but only mentioned.

IMPORTANT: Every department should have at least one active standardization project until all roles are well documented.

THIS IS VERY IMPORTANT: The meetings are meant to be positive. Negative comments are not permitted. If a project is going very badly, consider allowing the project manager to start over. This is a learning experience.

3. The Department Manager concludes by reviewing other elements of the Profile Page, if desired, or by introducing other business issues.

The Department Manager may want to highlight other information presented on the profile page. For example:

- Proposed changes to the department's Strategic Objective.
- The number of roles that have moved from the "Not Standardized" column to the "Standardized" column
- ScoreCard trends.
- New KnowledgeBase articles that may interest the group.
- Financial and budget data.

Ask a meeting participant to record new projects or to-dos directly into your OnTheSystem software as they are assigned during the meeting.

The entire meeting should last less than 30-minutes.

Assignment #4: Manage Continual Improvement Using Your Role Profile Page

Your OnTheSystem Role Profile page is a one page Program of Continual Improvement (PCI) for each role.

Use your Role Profile Pages to manage the improvement and documentation of your company's operating system. All it takes is a quick review of the profile page sections to assess the health of a process. Click on any project, to do or communication log links to drill down and manage the details.

Your Role Profile Page includes the following elements:

- 1 **Strategic Objective** - Prominently displayed in the masthead of the page.
- 2 **Role Description** - Summarizes the function, purpose and process of the role.
- 3 **KnowledgeBase Articles** - Lists all KnowledgeBase articles associated with the role.
- 4 **KnowledgeBase Documents** - Lists all KnowledgeBase documents associated with the role.
- 5 **Communication Logs** - Reports all the Issues and ideas logged by employees that relate to the process. The roles manager and approved employees should review open communication log entries and actively work to resolve each issue. If necessary, role participants should use the new information to update the roles strategic objective or convert the issue into a projects or to-dos.
- 6 **Projects & To Dos** - A list of initiatives designed to improve the role. Generally, each Role Manager should have one improvement project (or to do) associated with each role. Also, if the process is not yet standardized, the Role Manger should create a project (or to-do) to document the role in your BOK. However, in smaller companies, where one person served multiple roles, you should limit the number of BOK related projects so that one person does not have more than 2-3 active BOK projects.

As you review a Role Profile Page consider ways of improving strategic objectives, add or modify projects and respond to information logged on-the-system. In larger companies, use the Role Profile Page to manage role teams. Get everyone involved improving processes.

1 Strategic Objective

2 Role Description

3 KnowledgeBase Articles

4 KnowledgeBase Documents

5 Communication Logs

6 Projects Associated With The Role

! **ROLES (Processes) = "Bite Sized Chunks of Work"**
Remember, OnTheSystem uses the term "Role" to refer to a single process or job.

Assignment #5: Manage Employees (and Yourself) Using Your Employee Profile Page

Your OnTheSystem Employee Profile page performs two important functions.

1. It provides convenient one-click access to an employee's roles, projects, to do's, and log entries related to an employee (or yourself.)
2. It's a powerful performance management tool that lets you and your employees work together to define expectations and assess progress in a completely fair, open and democratic way.

It's based upon the idea that an employee's value to your organization relates directly to the following:

- The number of roles they know how to perform.
- The number of improvement initiatives they work on
- The number of ideas, operational problems and other important information that they share with your organization. And,
- How in alignment they are with the stated values of your organization.

Achieving Performance excellence in these four areas should help you identify self-motivated team-members who really care about your organization and want to help it succeed.

Use the Employee Profile page to mentor your employees and set them up for maximum success. Use it to create a positive employee-employer relationship based upon clearly defined expectations and an objective assessment of an employee's ongoing contribution to your company.

The Employee Profile Page consists of the following sections:

- 1 **Strategic Objective** - Prominently displayed in the masthead of the page. Now employees will know how they are connected to your company and what is expected of them.
- 2 **Role Training Plan** - Creates a training plan for the employee. Encourages job-sharing and cross-training. Encourages employees to document their processes and create a scalable infrastructure so they can move up in the company as it grows.
- 3 **Projects & To Dos** - A list of initiatives that the employee is managing or helping to implement. Generally, every employee should actively participate in at least one improvement initiative. It engages and empowers employees to improve the company. It prepares employees for leadership roles. It creates a team-culture.

The screenshot shows the OnTheSystem Employee Profile page for a user named 'Walter, Mike - Strategic Objective'. The page is divided into several sections:

- 1 Strategic Objective:** Located at the top, it displays a strategic objective for the employee, such as 'Improve the number of roles they know how to perform'.
- 2 Role Training Plan:** Located below the strategic objective, it shows a training plan for the employee, including 'Training in Progress' and 'Future Training Plan'.
- 3 Projects & To Dos:** Located in the middle of the page, it displays a list of projects and to-do items, such as 'Strategic Objective' and 'Strategic Objective'.

Other sections visible on the page include 'My Contributions', 'My Contributions (Blog Articles)', 'Employee Department(s)', 'Current Capabilities', 'Training in Progress', 'Future Capabilities', and 'Resume'.

4

Communication Logs - Reports all the Issues and ideas logged by the employee. It encourages employees to suggest ways of improving the company. It prevents supervisors from filtering information or taking credit. It helps identify employees who care about the company. It creates a positive team-culture where every person has an equal voice and an equal opportunity to make a difference.

5

KnowledgeBase Articles - Lists all KnowledgeBase articles contributed by the employee. It credits employees for documenting the best-practices of the company. It encourages employees to document their roles (processes).

6

Blog Articles - Lists all Blog articles contributed by the employee. It encourages the employee to write articles that are suitable for posting to the company's online newsletter. The idea is to have your employee's report what is important to them and create one company-culture even if employees don't work in the same locations.

7

Employee Resume - Allows the employee to display parts of their resume. The resume can then be searched by your OnTheSystem search engine when a project manager is looking for unique skills needed for an initiative. It's a great way for employees to promote their experience, skills and hidden abilities. For security reasons avoid loading any personal information.

Notice that the Employee Profile Page also includes sub-navigation links. The last link is to the Employee ScoreCard.

The employee ScoreCard allows employees and supervisors to rate the employee's alignment with your organization's established set of values. Scores are presented in the graph along with written assessments.

Use the ScoreCard to initiate a positive conversation with your employees. The list of values set your expectations. If you like, you can let your employees complete their ScoreCards themselves. This will help employees internalize the behaviors you expect.

As you can see, the employee profile page gives employees convenient access to everything they are working on ~ on-the-system. It also makes "goal setting and performance assessment" an ongoing, collaborative process that opens new lines of communication between employee and supervisor.

It is a powerful tool that you should use to multiply the opportunity of everyone in your organization as it grows and becomes more and more successful.



Step Four - Going for Platinum

Achieving Performance Excellence

Platinum Requirements: Use your OnTheSystem business development software to achieve performance excellence.

The Platinum Award is a discretionary award presented by your GASBC Counselor to up to 5% of their active Challenge participants. The award is granted to Gold Award winners who have achieved performance excellence.

To learn more please contact your GASBC Counselor or the GASBC.

What is Performance Excellence?

Do you remember the last time you walked into a business and said to yourself, "WOW, this is a GREAT company?"

What made that company great?

- Everything was very organized.
- It operated like a finely tuned machine.
- Their employees had the right attitude and seemed to care.
- Their customers were happy.
- Their products and services exceeded all expectation.
- The company was innovative and creative.
- It was a "goldmine."

Is your company a GREAT company?

If you've earned your Gold Award you should be very close. You have many of the prerequisites:

- You have a defined organizational structure.
- You have a "living" strategic plan
- You have a Program of Continual Improvement (PCI)
- You have a comprehensive Book of Knowledge (BOK)
- You have open lines of communication.
- You're created an effective management "language"
- Your employees are free from their "job traps" and are easy to promote
- Your business is scalable and even salable.

Now, to become a GREAT company, all you need is to put your organizational and leadership infrastructure to work building the kind of business you want.

Use your OnTheSystem business development software to strengthen your

Strategic Plan consisting of specific goals and related projects that:

- Open new markets
- Introduce new products
- Add new capabilities
- Focus your branding
- Open new locations
- Optimize your operations
- Improve your marketing
- Secure bank loans or venture funding
- Enhance your web-presence
- Improve your customer experience

The possibilities are only limited by your imagination and determination.

The Platinum Award recognizes GASBC participants who have successfully transformed their companies from good to great. They've demonstrated the ability to use their organizational infrastructure to achieve "Performance Excellence" based upon the following criteria:

- Scalability:** Your company is able to deliver consistent high quality products and services as it grows
- Continual Improvement:** Your company actively improves its roles and capabilities.
- Customer Focus:** Your company is innovative and responsive to the changing needs and wants of your marketplace.
- Continual Learning:** Employees are given maximum opportunity to learn new roles and advance in your company as it grows.
- Communication:** All employees have an equal voice and an equal opportunity to make a difference.
- Community Impact:** Your company improves its community.
- Innovation:** Creates new products, services, distribution channels, etc.
- Sustainability, Agility, Flexibility, Quick-Reaction:** You use your infrastructure to maintain your company's relevance over time.
- Marketing:** Your company continually updates its marketing and branding to evolve with a changing marketplace.
- Profitability:** Increased revenues result in increase bottom-line results.
- Life Balance:** You enjoy time off from work.

Tips & Techniques

Now the fun begins!

Your OnTheSystem Business Development software includes advanced features that grow with your business.

You may want to use some of these features right now. Other features will become more relevant to your company as you add employees or your business becomes more complex.

Please familiarize yourself with these features so you know they are available for your company's use when a need arises.

- **Use Projects and To-Dos for Both Strategic and Non-Strategic (Operational) Initiatives**
- **Manage What Individual Users See and Do On-The-System: *Four User Interfaces***
- **Manage What Individual Users See and Do On-The-System: *Case-by-Case Permissions***
- **Use OnTheSystem's Search and Advanced-Search**
- **Customize Your Preferences for System Generated Notes, Email and Daily Reports**
- **Use Your OnTheSystem Inbox/Outbox**
- **Use Your Communication Logs Instead of Meetings, Conference Calls and Email**
- **Additional Online Resources (User Guides and Video Tutorials)**

Use Projects and To-Dos for Both Strategic and Non-Strategic (Operational) Initiatives

OnTheSystem is business-development software designed to encourage:

- Organizational improvement
- Strategic planning and implementation
- Team communication, collaboration and coordination

OnTheSystem includes an integrated set of leadership tools that allows it to achieve its strategic purpose. These tools include a robust project management system and a To-Do (mini-project/assignment) system.

As you know, Projects and To-Dos are presented on department, role and employee profile pages along with their related strategic objective. **All it takes is a quick comparison of the objective with the related projects and to-do's to assess the logic and completeness of your company's "Strategic Path."**

But, what if you also want to use your OnTheSystem project and to-do tools for non-strategic initiatives like client projects or day-to-day operations like implementing equipment maintenance schedules? Can you do this without compromising the strategic-nature of your profile page reports?

Yes! Simply use the "Project Category" drop down list to identify the initiative as either a strategic or non-strategic. The "Project Category" drop down list is provided on both Project and To-Do setup screens.

Then use the sort drop-down list that's provided on every profile page, at the top of the project and to-do sections, to control whether strategic, non-strategic or all types of initiatives appear for your review.

Operations - Strategic Objective, Time left: 4224, 5A, 24th, 3a
Reduce production costs 2%. Achieve zero safety incidents. All roles are completely standardized with employees cross trained and easily promotable. All employees participate in implementing the department's improvement projects and to-do's. Employees actively use the Communication Logs to report ideas, problems and other information. The department work environment is characterized by open-communication, continual-learning, cooperation, mutual-respect and fun. [Edit | Description]

OnTheSystem >> OPERATIONS PROFILE

Department Projects

Past	Present	Future
Maintenance Schedule 2007	Create A New AI Sound Recognition Non-Strategic	Computer Stations
Standardized Materials Receipt Procedure	Auto Lease Program - Dispatch	New Employee Safety Plan
	Auto Lease Program	
	Computer Hardware Upgrade	
	Standardize Laser Finishing Process	
	Reorganize Warehouse	

Department To Do's

Past	Present	Future
Standardize Our Supply List	Research Acoustic Sensor Quality	Review All Department Strategic Initiatives
Customer Service Blog Article	Inspect Imaging Equipment	Paint Warehouse floor
Reshape Sanding Pad	Fix office door lock	
Use OnTheSystem	Update Employee Application	
Update Expense	Update Dispatch Procedures	
Exit door jammed out	Process Value Proposition Analysis	
	Reorder Stations	

Demco Company - Mission Statement, Time left: 2894, 10A, 10th, 8a
Shift from profit per division to profit per customer. Increase sales 8%. Become our customer's first choice in our marketplace. Provide a great work environment where all employees treat each other with dignity and respect. Focus on achieving the highest standards of quality, customer service, innovation, proactive management, productivity and fun. [Edit | Description]

Projects >> EDIT PROJECT

Project Header

Project Name: Auto Lease Program - Dispatch

Sponsor: [Select]

Manager: Kramer, Mike

Supervisor: Kramer, Mike

Department: --Operations--

Benefit: Lower Cost, Improve Selection

Priority: Normal

Task: Develop a fleet management program which offers maximum options at minimum cost.

Measurable And Method: A program offering at least ten automobile models, cost \$800 or less per month per vehicle with a total budget not to exceed \$80,000 per year. Lower costs 10% from current program.

Department Projects

Past

- Maintenance Schedule 2007
- Standardized Materials Receipt Procedure

Present

- Create A New AI Sound Recognition Non-Strategic
- Computer Stations
- New Employee Safety Plan
- Auto Lease Program - Dispatch
- Auto Lease Program
- Computer Hardware Upgrade
- Standardize Laser Finishing Process
- Reorganize Warehouse

Department To Do's

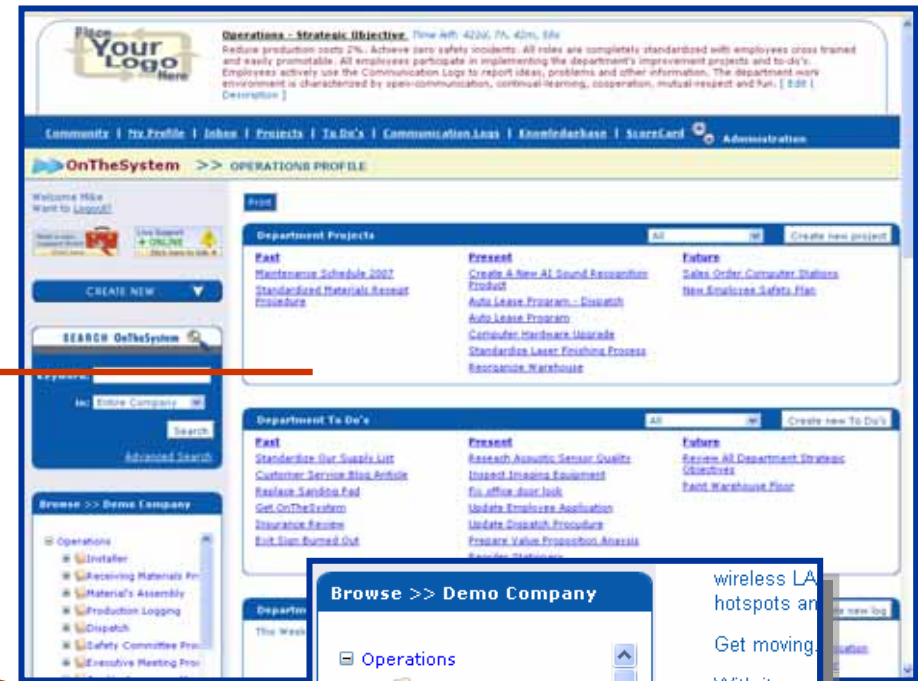
Project Category: [All | Strategic | Non-Strategic]

Manage What Individual Users See and Do On-The-System: *Four User Interfaces*

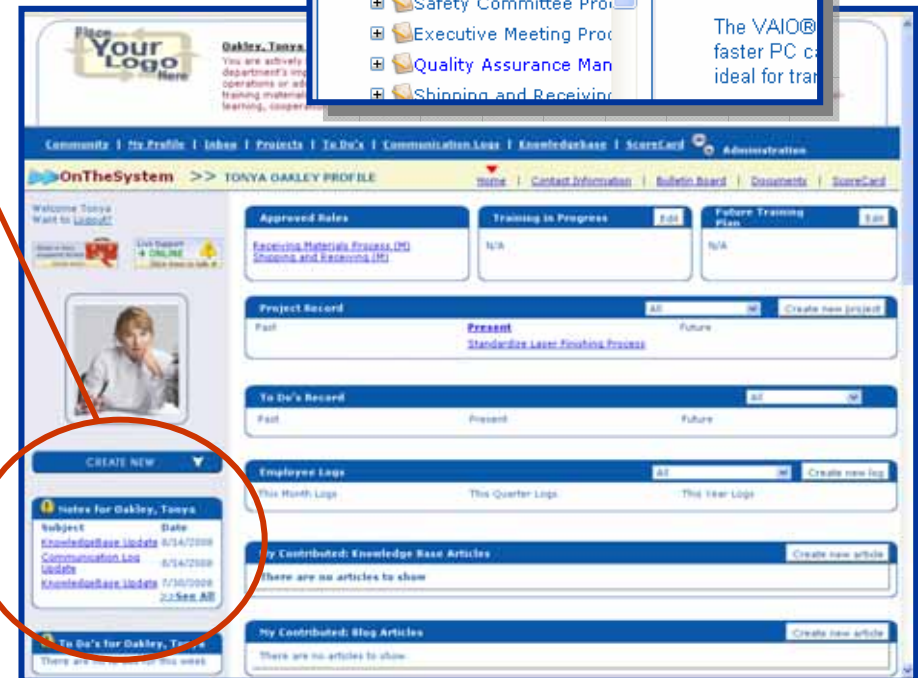
As your company grows you will likely want to give individual users more or less access to the strategic features of your OnTheSystem business model.

OnTheSystem offers you four unique user-interfaces that give you incredible control over what individual users can see and do on-the-system. The four interfaces are:

1. **Super User:** This interface provides a user with complete and clickable access to all departments, roles, employees, projects, to-dos, communication logs, KnowledgeBase entries, notes, permission/security grids, etc. Super Users can see and do everything on-the-system except for creating additional Super Users. Only the person who originally created your OnTheSystem account can grant Super User status.
2. **Full Strategic View:** This interface is the default setting for all users created OnTheSystem. The Full Strategic interface gives the employee/user access to the "Browse" company and search windows. Although, depending on the individual user's permission level they may not be able to click on every link. This interface is intended for middle and upper management.
3. **Limited Strategic View:** This interface removes the "Browse" Company and Search windows. Employees and users assigned to this interface can access their departments and roles using their personal profile page. This interface is intended for lower-level employees who you may not want to search and view your company's broader strategic vision and information.
4. **Restricted View:** This interface only allows users to access the specific projects, to-do's, KnowledgeBase entries and communication logs that they are specifically authorized to see using the case-by-case "Manage Security" feature. Also, all strategic objectives, usually displayed in the mastheads of every page, are removed. This interface is intended for outsiders like customers and vendors.



wireless LA hotspots and Get moving. With its cool leave at home this lightweight wireless LA for easy, un Connectivity. The VAI0® faster PC c ideal for tran



To assign an employee or user to an interface, hold your mouse over the "Administration Tab" and select the "Employee/User Management" option.

You're given instant access to a blank Employee/User Management screen.

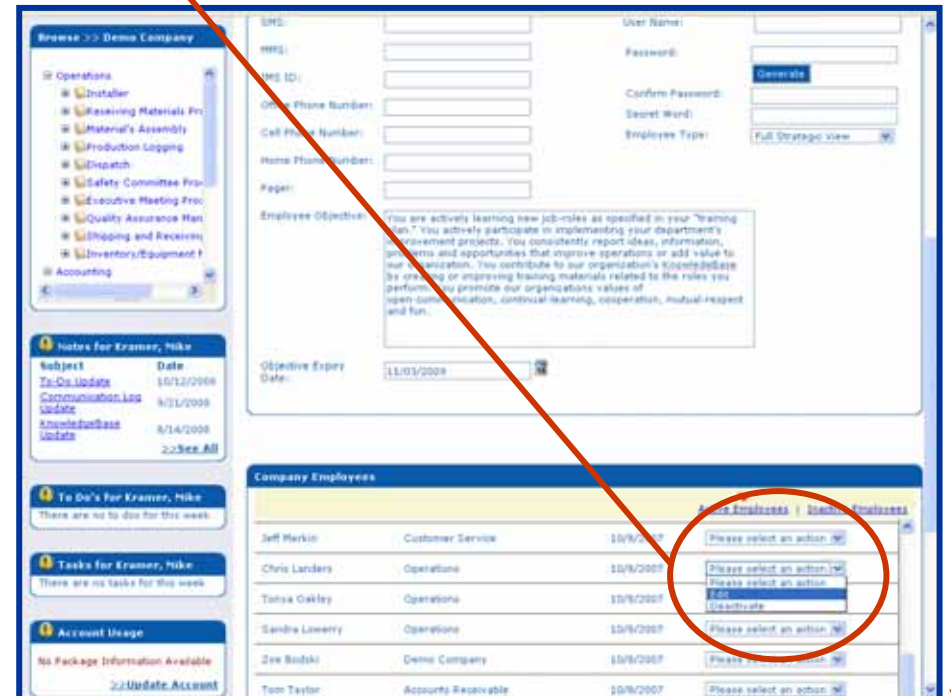
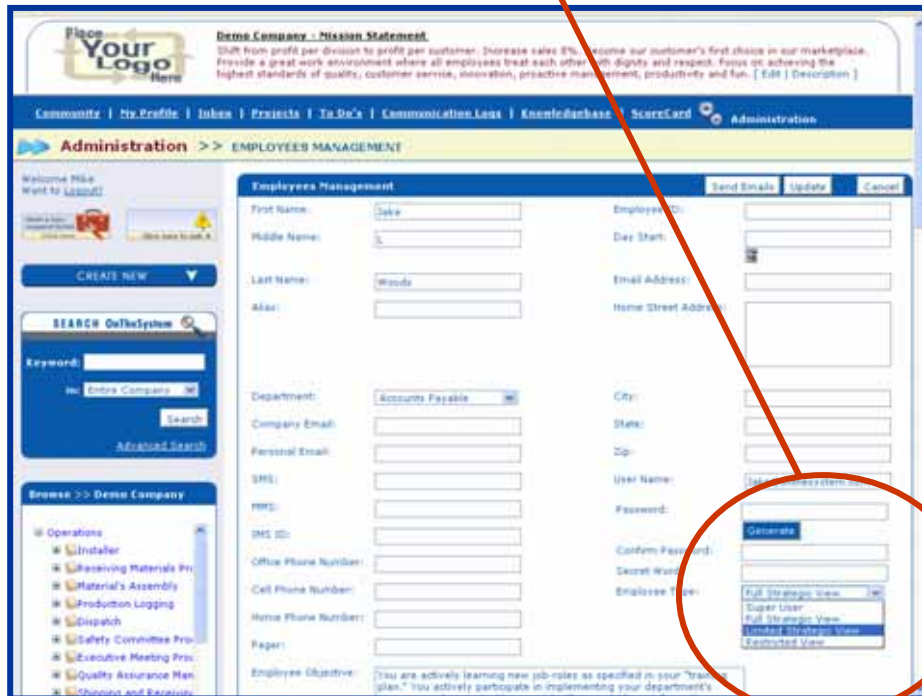
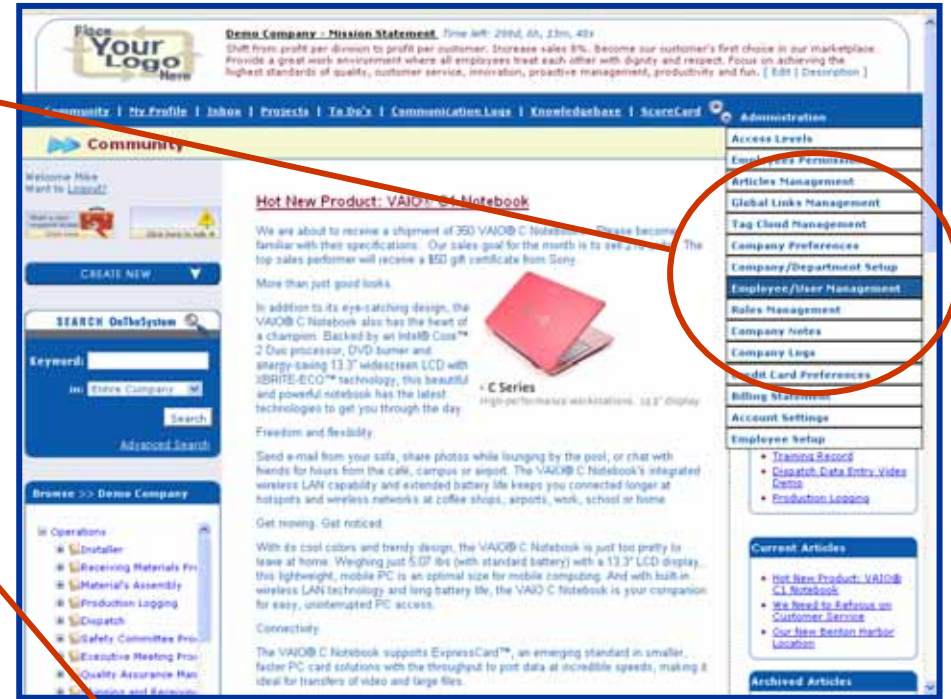
If you are setting up a new user, simply enter the required information including user-name and password. Use the "Employee Type" drop-down list to select the desired interface. Once complete, click on the "Add" button and your new user is set up.

If you want to change the interface setting of an existing employee or user, scroll down to the Company Employee/User list and use the Action Drop-Down list to select the employee/user you want to edit.

Once selected, the employee/user's information will populate the data-entry screen at the top of the page.

Use the "Employee Type" drop-down list to select the desired interface.

Once finished, click on the "Update" button and your revisions are saved.



Manage What Individual Users See and Do On-The-System: *Case-by-Case Permissions*

OnTheSystem gives you user-by-user, case-by-case control over which projects, to-do's, KnowledgeBase entries and communication logs can be searched, viewed and edited by specific employees and users.

To adjust access to an individual entry, click on the "Manage Security" link found in the entry's sub-navigation.

You're given instant access to the entry's permission grids.

Notice, there are two sections:

- User Group, AND
- Employee-by-Employee

The "User Group" section allows you to assign access by the management role performed by a given set of employees or users. For example if you allow Department Members to Search, View and Edit the entry, all users who serve one or more roles in the department will automatically be allowed to search, view and edit the entry.

As you make your changes, notice that a process wheel appears. It lets you know that your OnTheSystem software is automatically populating the Employee-by-Employee grids below.

Before saving your changes, scroll down to review the Employee-by-Employee grids. Adjust individual employees/user's access as desired.

When finished, click on the "Save" button. A message-box appears letting you know that your settings were saved.



User Type	Invite	Search	View	Edit	Delete
Create	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
To Do Manager	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Sponsor	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Supervisor	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Department Members	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Team - Invites	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Others	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Employee Name	Invite	Search	View	Edit	Delete
Bodak, Zoe	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Edward, Dan	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Hiersroth, George	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Oralton, Mike	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Johnson, Jim	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>



Click on any field description for an explanation on how the related check-boxes behave.

Use OnTheSystem's Search and Advanced-Search

Your OnTheSystem software automatically saves every project, to-do, KnowledgeBase article, note and communication log entry for future reference and review. The result is a valuable historical archive that retains the experiences, insights and decision making process of managers and project teams.

OnTheSystem provides you with three search options. Each option provides you with a more narrow and focused search method:

1. **Keyword search of the entire company** - Simply enter the keyword(s) you want to find and click the "Search" button. Your results will appear.
2. **Keyword search by information source** - Limit your search to one information source by using the drop-down list. The information sources include:
 - Projects
 - To-Do's
 - Communication Logs
 - KnowledgeBase
 - Documents
 - Employee Profile Page (Great for identifying employees with hidden skills that can be utilized for special projects or specific roles.)
3. **Advance Search** - Provides the most focused search method. This feature is accessible by clicking on the "Advanced Search" link.

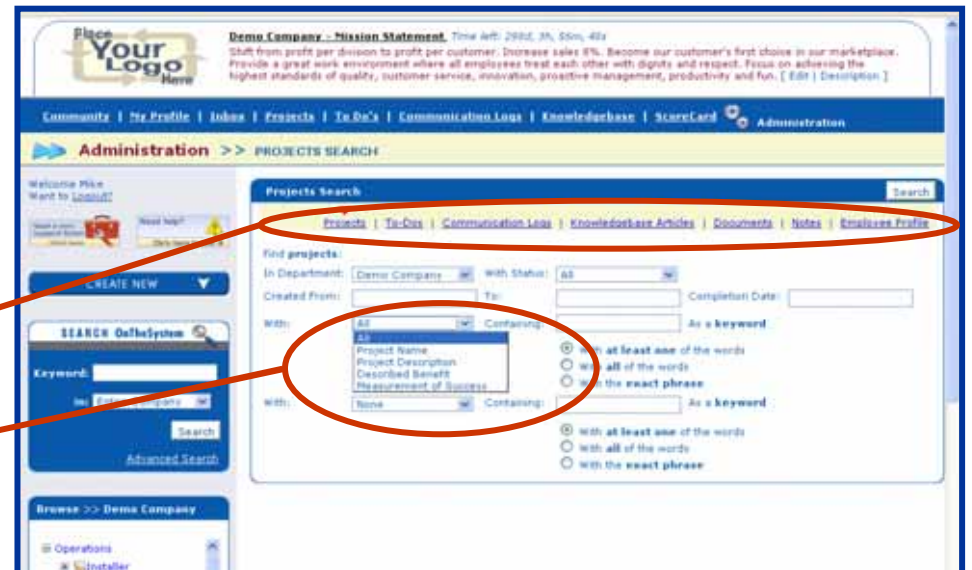
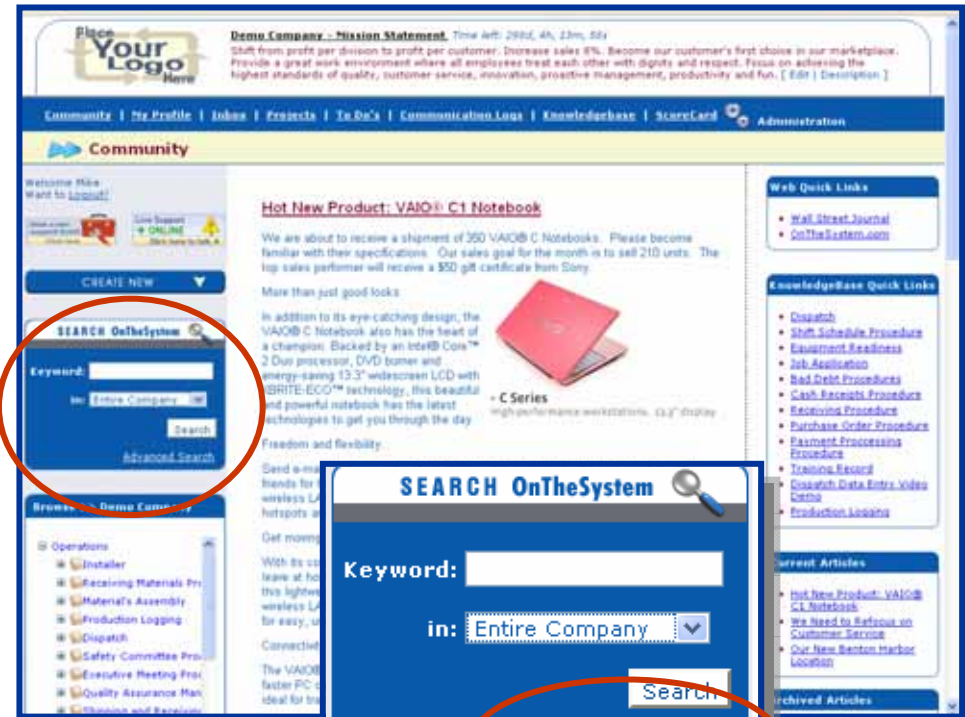
The Advanced Search screen allows you to perform a narrow search of seven key OnTheSystem information sources:

- Projects
- To-Do's
- Communication Logs
- KnowledgeBase
- Documents
- Notes
- Employee Profile Page (Great for performing resume searches)

Access the information source using the sub-navigation links.

Then, let the screen elements guide you. Notice that you are given great flexibility to narrow your search within specific data sets.

When ready, click the "Search" button at the top of the form and your search results will appear.



Customize Your Preferences for System Generated Notes, Email and Daily Reports

OnTheSystem helps get the right information to the right people so the right decisions can be made at the right time. It does this by automatically sending you a system-generated note every time one of the following events occurs:

- You are assigned to a management or supervisory role related to a new:
 - Project (or project task)
 - To-do
 - Communication log
 - KnowledgeBase entry
- You are assigned to manage a department or role.
- Someone updates one of your projects, to-do's, KnowledgeBase entries or communication logs.
- Someone creates a new Communication Log related to one the departments you work in.
- A due date related to one of your project tasks or to-do's is less than 48 hours away.
- A newsletter article is posted to your Company Blog.

OnTheSystem let's you choose how the notes are delivered.

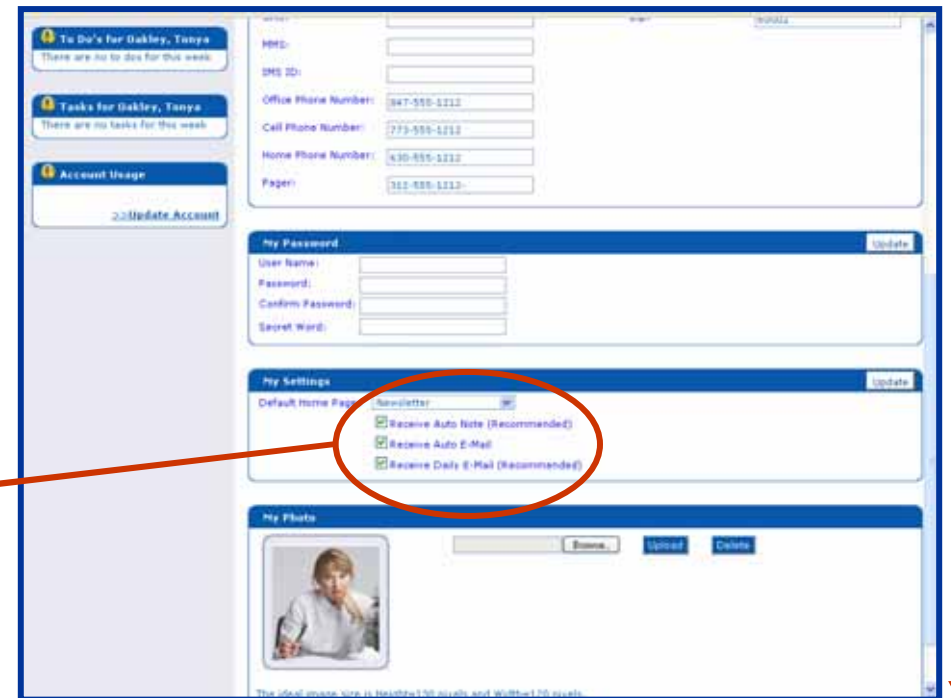
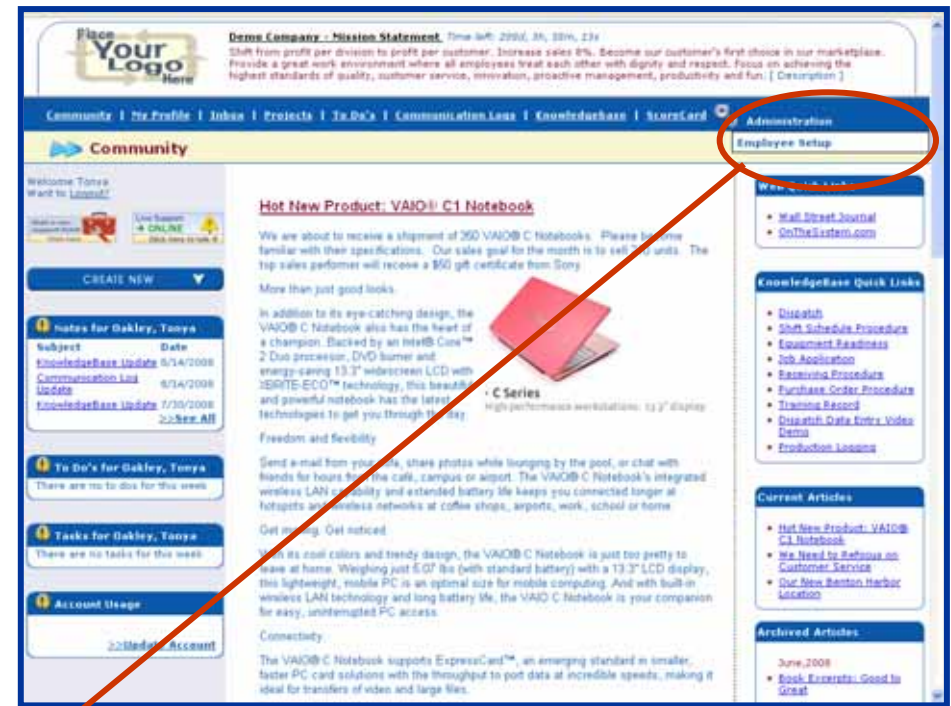
To modify these options hold your mouse over the Administration Tab and select the "Employee Setup" option.

You're given access to your Employee Setup (and preferences) screen.

Scroll down to access the "My Settings" section. Here you can set your default homepage to be either the Company Newsletter or your Employee Profile page. We recommend you select your profile page to be your default homepage.

Next are three check-boxes that let you choose the way OnTheSystem communicates with you:

- Receive Auto Note (Recommended):** Use this option to turn on and off the auto-note feature. We recommend that you check this box and keep this option turned on.
- Receive Auto Email:** Check this box to receive an email notification every time a note is sent to your OnTheSystem inbox.
- Receive daily Email (Recommended):** Check this box if you want a consolidated daily-report sent to your email address. The Daily-Report lets you know how many new messages are waiting for your review in your OnTheSystem inbox.



Use Your OnTheSystem Inbox/Outbox

To access your OnTheSystem message center click on the "Inbox" link provided in the top-navigation link list.

You're given instant access to your Inbox and Outbox.

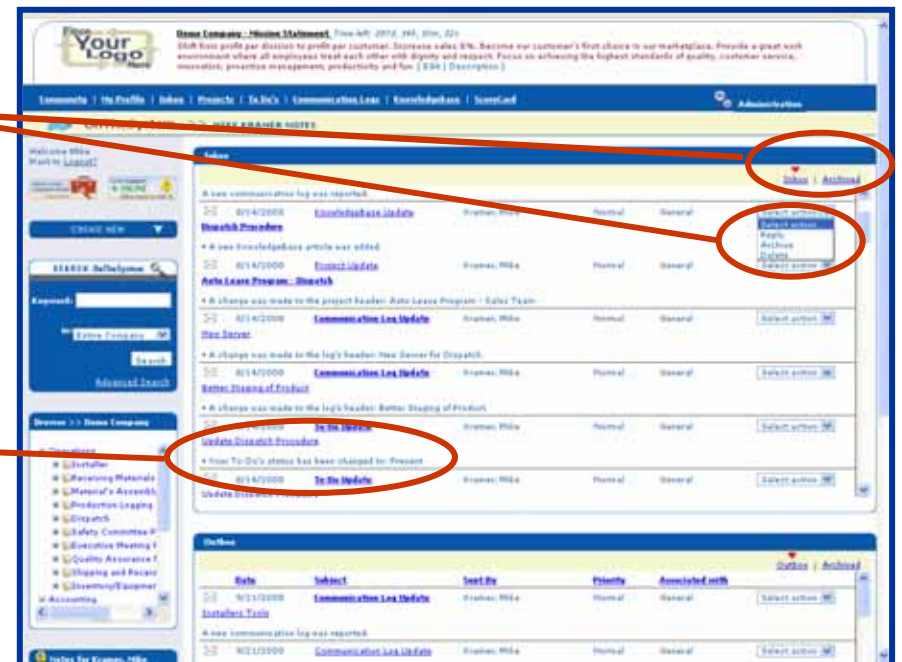
Notice that some links have a bold typeface. This feature is very important. It let's you know which message links have not yet been viewed. Here's how they work in both your inbox and outbox:

- **Inbox:** When a bold link appears in your Inbox, this mean you have not yet clicked on the message links.
- **Outbox:** When a bold link appears in your outbox, this means the recipient has not yet clicked on the message links.

To manage a note, simply click on the links. You are given instant access to the related project, to-do, KnowledgeBase entry, communication log, etc.

System-generated notes give you both general and specific links. This means if the note relates to a change to a project-task you will be given a link to the main Project Report Page and a link to the specific task where the change occurred.

Use the Action Drop Down list to reply, archive or delete a message. Archived messages are viewable by clicking on the "Archived" link in the Inbox sub-navigation.



When helpful, OnTheSystem generated notes lets you know what changed. For example: "Your To-Do's Status has been changed to: Present."

This helps you manage the information without needing to click on links.

Use Your Communication Logs Instead of Meetings, Conference Calls and Email

OnTheSystem communication logs are a new and better way for you and your team to communicate.

With just a few clicks of your mouse you can:

- Share an idea
- Identify a problem
- Suggest a way to improve your organization.

Better yet, once an issue is logged, you and your team can discuss and resolve each issue right in its own “virtual meeting room.”

OnTheSystem Communication Logs:

- Minimize the need for meetings and conference calls.
- Provide a great alternative to emails.
- Give everyone an equal opportunity to discuss and resolve issues.
- Won't interrupt your day because now you can contribute your insights and comments when it's convenient for you.
- Documents your company's decision making process.
- Are retained for future reference.
- Create a team-culture centered on innovation and creativity.

To log a problem, idea or information, simply hold your mouse over the “Create New” tab and click on the “Communication Log” option

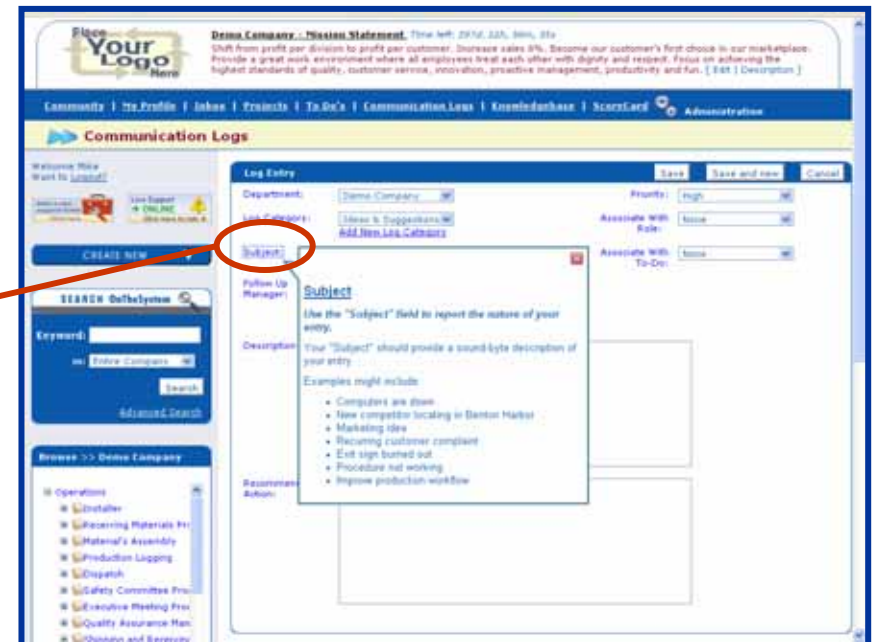
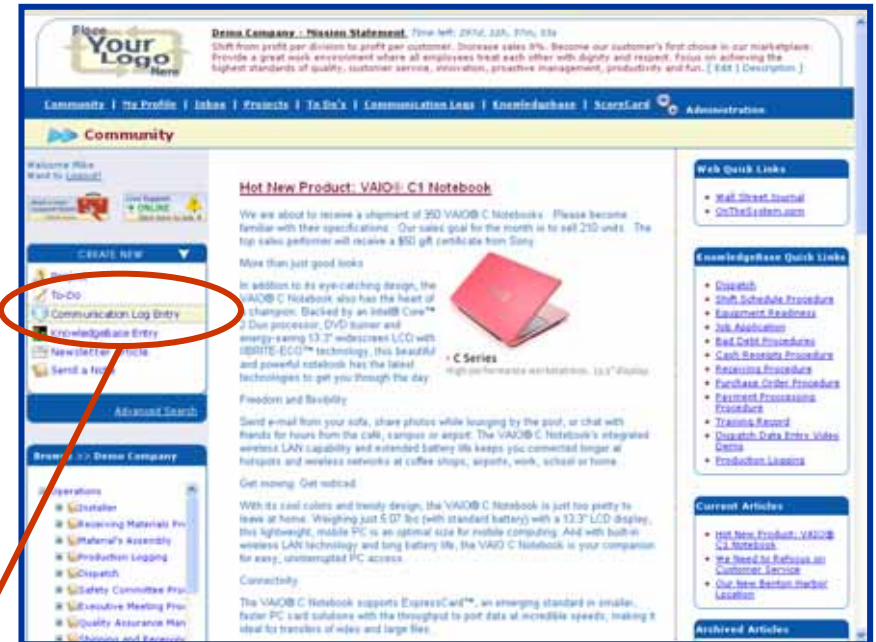
You're give instant access to a blank Communication Log data entry screen.

Now, let the screen elements guide you.

If you need help, click on any field description. A help window will appear. To close the window click on the red “x” in the upper right hand corner.

When finished click on the “Save” button.

! Once saved, a link to your Communication Log entry will appear on the selected department, role and manager Profile Pages. Also, a system-generated note will be forwarded to all employees/users associated with the related department and role. As a result, OnTheSystem helps get the right information to the right people so issues can be acted upon quickly, efficiently and effectively.



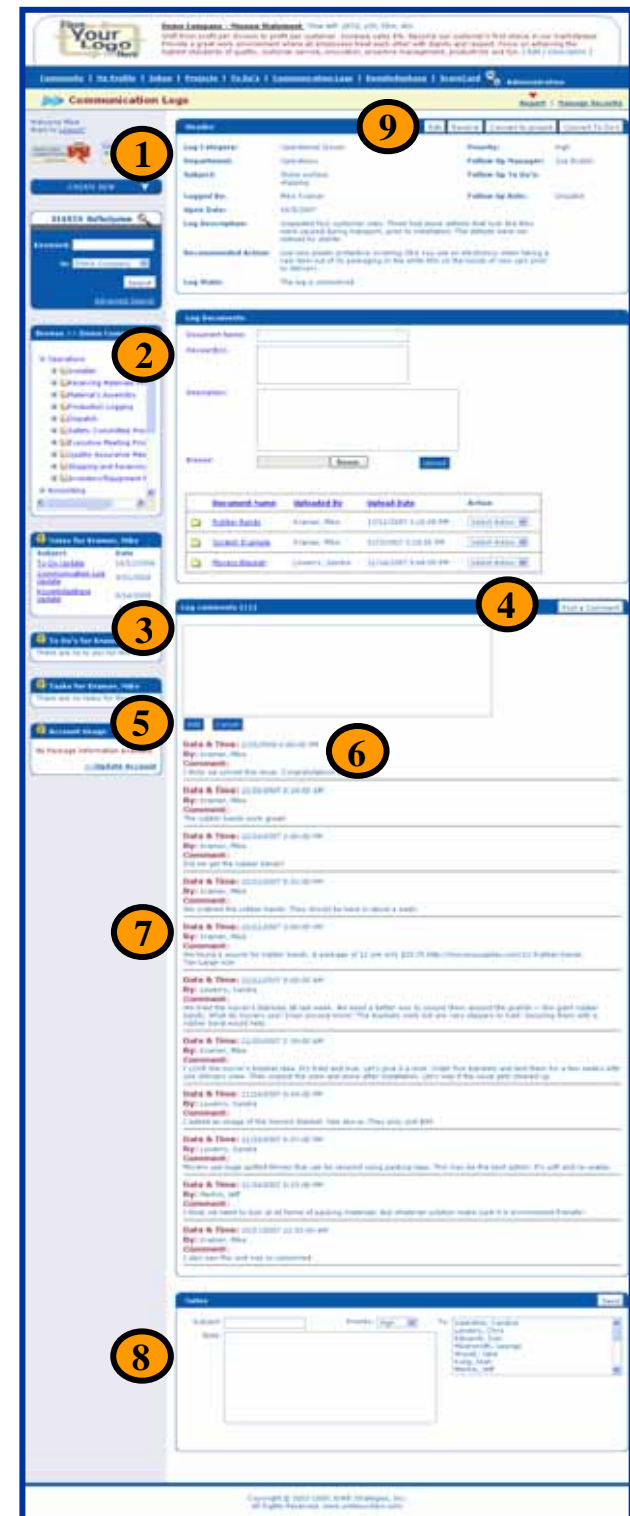
Once saved your communication log creates a “virtual meeting room” where you and your team can discuss and resolve the issue.

- 1 The **Header Section** provides a quick overview of the selected issue including a description and recommended action.
- 2 The **Log Documents Section** allows users to upload and share an unlimited number of issue related documents, files, images, videos, etc.
- 3 The **Log Comments Section** lets users share their ideas, insights, experience and recommendations for resolving the issue.
- 4 To input a comment simply click on the “Post a Comment” button. An input window will appear. Then type in your comment.
- 5 When done, click on the “Add” button.
- 6 Your comment will appear at the top of the list.
- 7 You can review the conversation by scrolling down to the bottom of the comments list and reading your way to the top.
- 8 The **Notes Section** allows you to send a message to one or more employee/users OnTheSystem Inbox. To send a note to multiple people, simply hold your shift key while clicking on individual names in the name-selection window. Selected recipient’s names are highlighted.
- 9 When consensus is reached, use the buttons at the top of the screen to mark the issue as resolved or, if further action is required, convert the issue into a project or to-do.

As you can see your OnTheSystem Communication Logs are a powerful team communication and collaboration tool. They offer significant advantages over emails and meetings in the way they share information and resolve issues.

! Most people become very frustrated when they are constantly interrupted with random issues when they are concentrating on their work. As you know, interruptions can become a major drag on your company’s productivity and effectiveness.

Now you have a solution. From now on, when you are interrupted with a non-critical issue, ask your co-worker to “log it on-the-system.” Then resolve the issue when it is convenient for you.



Additional Free Online Resources

Videos

Use the following link to access short, easy-to-understand video tutorials:

www.onthesystem.com/videos

- Overview
- Department Profile Page
- Employee Profile Page
- Team-Blog (Newsletter)
- Communication Logs
- To-Do's Task Management
- Team-Mail (Notes)
- How to Manage Roles
- Managing Departments

Use the following link to access videos that show you how to setup your new OnTheSystem account: (These videos are most helpful to *Going for Bronze* Participants.)

www.onthesystem.com/gettingstarted

- Step 1: Setup your organizational preferences
- Step 2: Setup your department preferences
- Step 3: Setup your organizational structure
- Step 4: Introducing OnTheSystem to your team
 - 'Screen Tours' User Guide (PDF)

User Guides

Use the following link to download easy-to-read OnTheSystem User-Guides:

www.onthesystem.com/userguides

- Projects
- To Do's
- Communication Logs
- KnowledgeBase
- Newsletter Blog
- Administration - Company/Department Setup
- Administration - Role Management
- Administration - Company Preferences (Setting up default strategic objectives for departments, roles and people.)

Tell Your Friends about the Challenge!

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www.GreatAmericanSmallBusinessChallenge.com