

Synergistic Systems

By Kay L. Cross, MEd

Creating Effective Systems

Gain more time, focus and energy with streamlined processes for work and home.

Current Time: 6:35 AM

Required Time of Departure: 6:30 AM

"Where in the heck are my keys! Honey, have you seen my car keys? Oh, I hate it when I do this!"

The adrenaline is coursing through your veins and your stress is quickly soaring. You are already 5 minutes late leaving for your first personal training client of the day. After 5 more minutes of searching, you finally uncover your keys in the pile of mail you threw on the counter late yesterday. Now you are already behind and you feel harried and angry. Why? Because you do not have simple systems in place to make your life run more smoothly.

What Is Synergy?

"Systems synergy" is the harmonious flow created by defining a specific way of doing something with the habitual practice of successfully repeating it. If you decide on a particular place to put your car keys each time you return home and you repeat that behavior over and over, the system you create will become automatic. The stress of locating your keys early in the morning when you are running on a tight schedule will be history.

The purpose of this new column is to guide you in creating synergistic systems that will allow your business and personal life to operate with the least amount of effort. You repeat numerous activities daily, weekly or monthly that can be defined, refined and delegated to a "system." By creating synergistic systems, you will save precious time and energy that can be invested in the people and activities that matter the most to you.

Why Create Systems?

Establishing a system provides a framework within which to operate that reduces

unnecessary repetitive work or energy expenditure. The search for car keys and the selection of work clothes for the day are some examples of how people continue to frustrate themselves daily. Many people fear that if they create systems that work—an order to follow for everyday repetitive activities and a place for everything—their freedom will be restricted and they will feel controlled. I have discovered quite the contrary to be true.

As I was revamping my personal training business 3 years ago, I focused on creating an order to follow when prospects called requesting information about my coaching or personal training services. I had become weary of scrambling around at the last minute to gather the information I needed to send and to remember all the information I wanted to collect from the prospects. The system I created, called the "PT Inquiry," is a checklist for myself that told me what needed to be done, and in what order, and what promotional information needed to be sent. Why should I stress my brain by trying to remember every detail every time for the various services I offered? I have an exceptional memory, but I lose my creativity when I clutter it with too much trivial information. I've learned that putting my thoughts on paper frees my mental energy for the activities that truly require creative, spontaneous thinking. I discovered that creating systems made my life easier and allowed me extra time to do other things.

What Systems Do You Need?

The goal of devising systems is not to turn you into a robot, but to make many of your work-related activities easier. Some of the systems I currently have in place for my business are monthly billing, sending promotional materials, accumulating CECs, writing new training programs, client scheduling, budgeting and dividing my work hours.

You can use two main categories to classify your system needs: client management and practice management.

Client Management. Client management refers to the things you need to

track, organize and manage for clients and their data. What forms and reports do you need? What is your plan for scheduling assessments, program design updates and active rest? How do you keep track of clients and their progress? Do you have a plan in place to keep clients motivated and educated? The systems you create need to harmonize client needs with your unique approach to the business.

Here are some common systems for client management:

- * billing
- * client scheduling
- * new client inquiry and follow-up
- * forms and updates
- * program design updates
- * client feedback and reports
- * client education
- * assessments

Practice Management. In practice management, you are required to step outside of yourself and take an honest look at your life from the view of a life/business manager. What are you doing to work *on* your business and personal goals? Have you made a habit of evaluating where improvement is needed and how to balance your time between client hours, administration, business development and planning? If you were your own life/business manager, would you be promoted or fired? Successful self-management is the ultimate test of discipline, perseverance and internal motivation. Practice management includes cleaning out and reorganizing your office/business space, setting and tracking business goals, categorizing your work hours, tracking CECs and following a marketing plan.

Here are some common systems for practice management:

- * filing
- * tracking CECs
- * planning work hours and responsibilities
- * computer, equipment and promotional material updates
- * business goal setting and tracking
- * personal wellness
- * referral generation and marketing
- * bill paying and budgeting

EVALUATION SHEET FOR SYSTEM NEEDS

To figure out what types of systems would help your business and personal life, fill out this evaluation form.

| Type of System | Do you have this system in place? | Satisfaction with and effectiveness of system (1-5 scale) | Is this a system you would like to create? |
|--|-----------------------------------|---|--|
| 1. Assessments | | | |
| 2. Billing | | | |
| 3. Bill paying and budgeting | | | |
| 4. Business goal setting | | | |
| 5. CECs | | | |
| 6. Client education | | | |
| 7. Client feedback/reports | | | |
| 8. Forms and updates | | | |
| 9. Personal wellness (workouts and rest) | | | |
| 10. Planning work hours and responsibilities | | | |
| 11. Potential client follow-up | | | |
| 12. Program design updates | | | |
| 13. Promotional materials and updates | | | |
| 14. Referral generation | | | |
| 15. Scheduling | | | |

10 Simple Rules for Systematizing

To design and implement systems that work well for your business, use these rules.

1. Make a list of all the business/work-related activities you do that are repetitive and could be converted into a "system" (writing new training programs, client billing, cleaning, assessments, etc.).
2. Make a list of all the personal activities or chores that are repetitive (laundry, cleaning, paying bills, yard work, grocery shopping, etc.).
3. Make sure each system is simple and logical.
4. Outline each system on paper or draw a flow chart.
5. Create a system that is so good that it will not need to be recreated for several years.
6. Test the system on a friend.
7. Re-examine each system to find frivolous steps or costs that can be eliminated.
8. Create a name and a checklist for each system after you have perfected it.
9. Make sure you keep in mind that anyone who works for you must be able to follow the system.
10. Re-evaluate each system annually.

All Systems Go

Current Time: 6:25 AM

Required Time of Departure: 6:30 AM

You are now at your favorite coffeehouse, calmly sipping your chai latte, reading the morning's headlines with 5 minutes to spare before you need to leave for your first appointment of the

day. You are smiling and cheerful, your heart rate is low and you are contemplating your day's activities. You calmly ate breakfast and left the house early. Your briefcase was already packed and ready to go this morning, your clothes were out and ready to wear and your lunch was waiting in the refrigerator. The sunrise is beautiful, and you are looking forward to a day of opportunities made possible by the implementation of a few simple, time-saving systems. Here's to a year of synergy!

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