

Company Name: Example Ltd

OPERATIONAL ACTIVITIES

Operational Activities are the things your business does to make money from idea to satisfied customer

Set the direction and strategy for the business

Managing Director

Develop new products and/or services

Managing Director

Market products and/or services

Marketing Director

Provide customer support

Sales Director

Deliver physical products

Operations Director

Sell products and/or services

Sales Director

Deliver Services

Operations Director

SUPPORT ACTIVITIES

Support Activities are the things your business does to make sure the Operational Activities can be delivered efficiently and effectively

Build the right team for the business

HR Director

Ensure the business is well financed

Finance Director

Provide the right technology for the team

IT Director

Ensure the business is compliant

Operations Director

Company Name :

OPERATIONAL ACTIVITIES

Operational Activities are the things your business does to make money from idea to satisfied customer

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who does it?

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who does it?

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OPERATIONAL ACTIVITIES

Set the direction
and strategy for
the business

This is the work the business owner and leaders do to set a clear vision and objectives for the business. A strategy sets out what the business is and isn't going to do for the next 2-3 years. The team will also consider the business model, the ideal customer and the target market.

Develop new
products and/or
services

This is research and development activity and key to innovative businesses. You may not be developing completely new products however, improving existing services with new technology would also fit here. Any sort of activity that helps you develop a unique proposition compared to your competitors

Market products
and/or services

This is your marketing activity to generate awareness of your products, services and brand. Marketing activity normally starts with inputs from your strategy and your new products and/or services. Marketing supports sales by educating potential customers and driving inbound interest.

Sell products
and/or services

This is the activity to sell your products and/or services to your clients. It typically starts with some sort of request from a prospect or existing customer and ends when an order has been placed.

Deliver physical
products

This is the fulfilment activity required to ensure a client receives the goods they have ordered. It may include a member of your team delivering directly to a client and installing equipment or using a third party logistics provider to fulfill on your behalf. This activity starts with a confirmed order and ends when the product has been successfully delivered.

Deliver services

The delivery of services can range from providing access to software through to project work including works delivered on a retainer. This is the work required to ensure that the service the customer is paying for is delivered on time and to the right quality.

Provide customer support

Customer support activity is the work you do to ensure your clients have their questions answered quickly in the event of a query about delivery of a product and/or service. These may be general questions about the product/service or they could be problems a client is facing. A good customer support service will ensure that a client's questions are answered quickly and effectively and ensure a good customer experience.

SUPPORT ACTIVITIES

Build the right team for the business

This is the work you need to do to ensure you have the right team with the right skills when you need them. The work includes hiring, reward (pay, holidays etc) as well as training and managing the safe departure of an employee

Ensure the business is well financed

This is the work of ensuring that money flows effectively through the business. Invoices are sent and dealt with in a timely manner. Bills are paid on time. Taxes and tax returns are filed according to local rules and regulations. This work should also provide valuable intelligence to the business leaders to support decision making.

Provide the right technology to the team

This work is about ensuring that the team has the right equipment to execute their work. Equipment, including phones and computers, need to be fit for purpose and secure. Software tools need to be easy to use and secured from malicious attacks.

Ensure the business is compliant

This work ensures the business remains compliant with rules and regulations. These may be financial, health and safety, privacy and/or ethical regulations. This work may also include compliance with industry standards and the maintenance of certifications.

HOW TO USE THIS DOCUMENT

This is a view of the key activities in your business. It helps you have focused conversations about what you need to do. You can use it to highlight areas that need improvement or to describe things that you're working on. Remember not to focus on one area of the business but take a holistic approach. Often solutions lie within other areas of the organisation

Ideally, complete the blank template with your team, so that everyone has a shared understanding of how the business works, who is responsible for what and what tools and software you need.

1 First give your process a title and date

2 Review the activities described and consider which ones you need to look at. For example, if you are an accountant you don't deliver physical products so that box won't need to be used.

3 Update any boxes if you think there is a better description for that activity that is relevant for your business.

4 Write in any key activities you think are missing but remember a lot of activities will sit under these main areas.

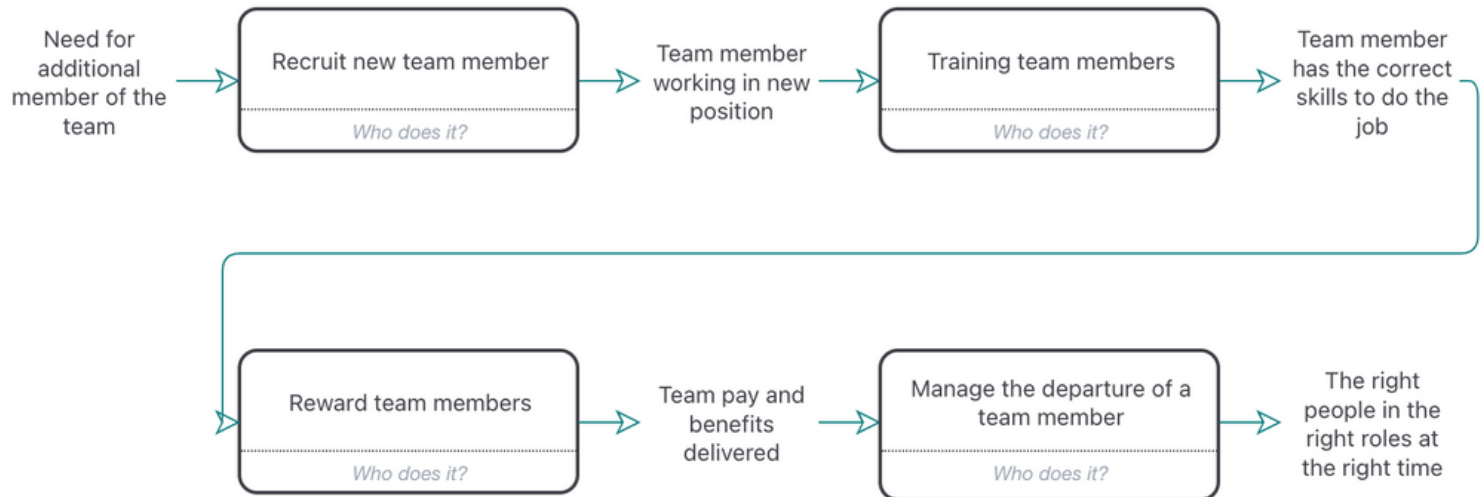
5 Add the job title, or name, of the person who owns each of these activities. What does it tell you? Do you have the same name on every box? Can that person really do everything?

6 Once you have an overview of the organisation you can start exploring individual processes in your business. Take a look at the next page for an example. Grab another piece of paper or try a simple software platform like Skore to keep all your information clear and in one place.

Example Process

HR - Recruiting Team Members

SK()RE
POWERFULLY SIMPLE PROCESSES



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