



MODULE FOUR

workbook

Creating a system that works for you



CREATING A SYSTEM THAT WORKS FOR YOU

There are a lot of benefits in having a system. You know what needs to be prioritised, it frees up headspace to concentrate on other things and it helps prevent mistakes and rework.

We look closely at bookkeeping processes, because every business has them. If you have other processes on your farm that need to be examined, documented and streamlined use the tools and examples provided to improve them too.

Documenting our processes and procedures can help in a number of ways

- We can identify areas for improvement
- We can use documented processes to outsource or delegate tasks to others
- In our planned or unplanned absences, others can step into the role to make sure the important things get done.



WHAT'S WORKING WELL

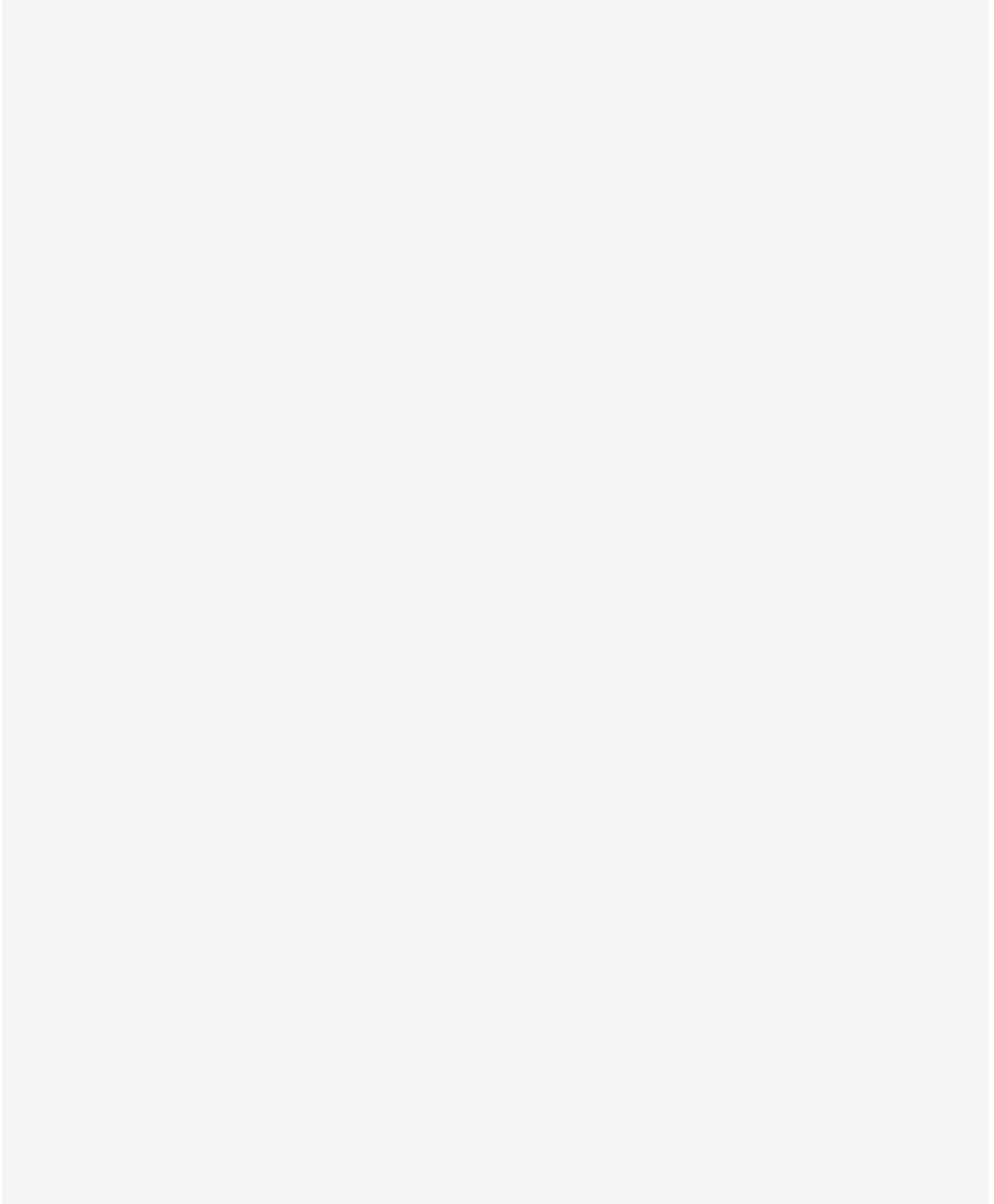
INSTRUCTIONS: Take a moment to reflect on what is working for you in your office systems and processes. When you look to make improvements, building on successful strategies is a great place to start.





OUR OFFICE SYSTEM

WHAT ARE YOU DOING NOW? DOCUMENT IT HERE

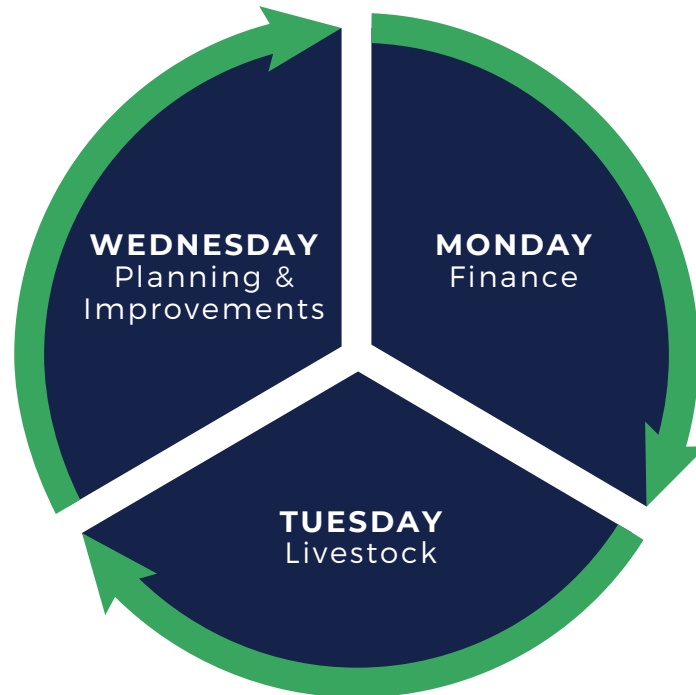




A FEW EXAMPLES

WHAT WILL WORK FOR YOU?

WEEKLY



MONTHLY

- Organise quotes
- set up long term scheduled payments for things like electricity, rates and credit cards
- Update budgets
- Reconcile BAS
- Reconcile bank accounts
- Finance and insurance issues



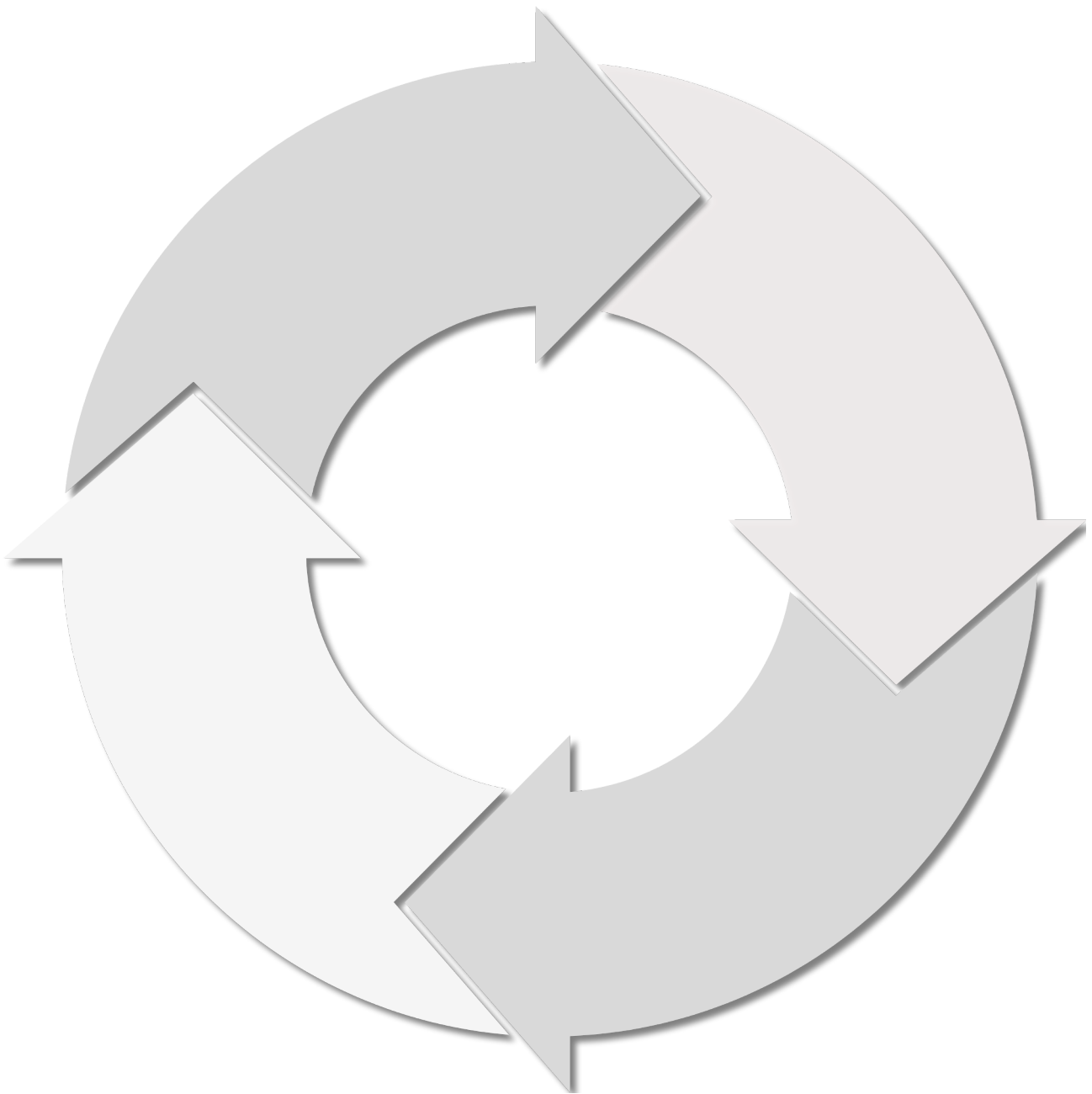
- Open paper mail
- Paper based system - open emailed bills and print
- Paperless system - move to unpaid bills file
- Have a quick look over the bills, action anything that need to be chased up
- Schedule payments for bills due before 30th

- Open remaining emailed bills and print (if you have a paper system) or file electronically
- Transfere or schedule payments for remaining bills
- File bills by month paid



FINANCE CYCLE

INSTRUCTIONS: Think about the finance tasks that you undertake. How can they be split over a week or a month to maximise efficiency and streamline your bookkeeping. Group non essential task or work which is not time sensitive together and skip this step when things get busy.





DOCUMENTING PROCESSES

INSTRUCTIONS: Think about your most important office or farm tasks. Document your processes, broken down into simple steps. When you are finished, ask someone else in the business if your instructions are easy to understand .

STEP

01

STEP

02

STEP

03



DOCUMENTING PROCESSES

STEP

04

STEP

05

STEP

06