

Welcome! In this lesson, we'll continue to build on what we've learned about the mechanics of simple productivity systems and extend it to working with a team.

To do that, we'll go over the important concepts you'll need to know and work with in order to be successful building team systems. And then we'll walk through a couple examples so you can see how these kinds of systems come together and apply to your own life or work.

But first, a quick reminder of what qualifies as a simple system. If you remember, there are three criteria. First, there should only be one goal. The final output of the system should be a singular, cohesive product or results.

Second, the system should flow in a linear progression. One step leads to the next.

Finally, a simple system shouldn't have any conditional logic. The result of each step or piece of the system should be repeatable and unambiguous so that no decision making has to happen between steps about what to do next.

What that effectively means is that you—and your team—should be fully in control of the results of each step.

Alright, so let's get into what's required to adapt this kind of system to a team setting. It's one thing to build a system or a routine or process for yourself. It's an entirely different thing to create one for a group of people who are all unique individuals with their own ideas and quirks and idiosyncrasies.

If you try to build even a simple system for a group of people—but you do it alone, in a vacuum—you might find yourself surprised at how poorly it ends up working even when it seems so easy to follow.

That's why the first rule of system design for a team is that, whenever possible, everyone should be involved with creating the system.

If you're creating a workflow that's going to require four different people to operate, you should try to get them involved from the very beginning. Even if you already know how everything *should* work, you'll find a lot more success if you get buy-in from your team from the start.

This is important because it provides you an opportunity to get everyone involved to understand the problem that you're trying to solve by creating the system. If anyone doesn't understand or agree with the problem or the goal—which is the whole purpose behind creating the system, then you're going to be fighting an uphill battle

to get them to successfully operate the system no matter how easy you make it for them.

Do you remember back in the very beginning of the course when we talked about the reasons why you might not “feel like you’re a systems person?”

One of the primary reasons we reject systems and routines is because so many examples of the ones we have in our lives were forced onto us. Processes at work or school or from our parents when we were young.

And so many examples of systems we were forced to use that we didn’t understand or didn’t agree with.

When you look back, you can probably see what the point of the system was—maybe you even see its usefulness now in hindsight—but when you were stuck in the middle of it, it felt kind of awful. You wanted to reject it because it felt like a kind of foreign control over your life. It made you feel less autonomous.

Well, now that you know that, it’s your job not to perpetuate the problem. If you want really effective and successful systems, you need to include your team—whether that’s a team at work or your family or a club or whatever—you need to involve them in the process of system creation.

When everyone’s involved in creating the system together, everyone will feel a higher level of ownership over it. It will create a sense of team commitment to whatever process or system you’re building.

And it’s that feeling of ownership that’s going to motivate everyone involved to actually use what you end up building.

It’s more work up front, but it’s really the only way to guarantee that what you build has any kind of staying power.

That brings us to the next important part of team system building, which is creating ownership for each step.

As you build out the steps and the parts of your system, it’s critical that each one is controlled by someone specific. One person should be in charge of each piece of the puzzle.

This is important because—as you’ve probably experienced—“team ownership” can lead to “no ownership.”

In general, if there's no specific person in charge of completing a task or driving something forward, it's not going to get done as often as it should or it's not going to make as much progress as it could.

When you're building out the system, you want everyone involved to feel committed to the end goal and the system in general, but you have to take it further.

Wherever action is required, someone needs to have ownership over that action so that it's completely unambiguous that, when it's time to do that piece of work in the system, one person knows that it's their responsibility to get it done.

If you skip this step or don't get it right at first—and it's totally okay if you don't get it right at first (remember, system building is an iterative process)—you're going to figure it out pretty quickly because what ends up happening is your system stalls.

Progress stops and no one's really sure who hit the brakes. As you look around, what you find is that no one stopped it! You just got to a point in the process where something needed to be done and either no one was assigned to that task or everyone thought someone else was doing it.

Again, this is a hard part to get right from the start. Part of building a successful team system is going to be embracing it and committing to fixing these kinds of problems as they come up rather than just abandoning them.

So, to whatever degree it's possible, try to make sure that every piece of your system has a "boss." Someone who's in charge of managing that part of the process and everyone else knows that, if there's a question about what's going on in that part of the system, they know who to ask about it.

Okay, the next important thing to focus on when building a team system is to make sure each step has a deadline attached. Honestly, this is pretty important for individual systems as well, but it's also really important for team systems because a critical part of keeping a team system healthy is a sense of momentum.

That's Newton's First Law of Motion. Objects in motion will stay in motion unless acted upon by an outside source. And objects at rest will stay at rest.

You've probably noticed in your own life how much easier it is to get things done when you have a sense of momentum built. It's like running downhill with the wind at your back. And when you've lost momentum, getting it back is like trying to sprint up a hill with a headwind. It's really hard!

Well, the effect of momentum—or the loss of momentum—is compounded in a team system.

When everyone is completing their pieces on time and things are flowing, results compound. You get a tremendous amount of value out of your systems really quickly.

But when even one person loses momentum or when one step in the process is susceptible to slowdowns, it can bring the whole team down and require a big effort from everyone to get things up to speed again.

And the primary way to fight that is to set sensible deadlines for each step of the process. This is another factor that's going to be difficult to get right on the first try, so make sure you hold space in the beginning to do some analysis and make sure the steps of your system are right-sized to encourage momentum.

This is another place where involving your team and all the people who will control each step is really beneficial. Sometimes, certain pieces of a system will just naturally take longer than others, and it's best for everyone to understand the natural flow of the system so that you set reasonable expectations at each point in the process but still challenge everyone to move quickly.

If you can, try to make the deadlines and timelines for each step a piece of public information—something that everyone on the team understands. That way, everyone knows what to expect at each stage of the system and doesn't get impatient or use slowness in one part of the system to justify moving slower during their part.

You'll also find that deadlines at each stage are an important part of understanding what's causing problems when they get missed. Just having a deadline makes it easier to have a conversation with the people responsible for that deadline. It makes it easier to see what's at fault. Sometimes the deadline is unreasonable. But sometimes, the person responsible isn't working effectively.

Without setting that expectation from the beginning—and adjusting it as necessary—it's hard to know where the fault in the system actually is.

And if you can't find the problem, you can't fix it.

Okay, the last critical piece to building an effective team system is establishing clarity around what “done” means.

At each step of the process, it's really important to know what specific criteria have to be met for that step to be done. That's not just important for the person who's in charge of that step. Obviously, they need to know what constitutes success. But it's also important for the person who performs the *next* step in the system.

Remember, when you're creating a simple system, the result of any given step is both unambiguous—so it's either done or it's not done—and also completely within your control. So, the person in charge of the step doesn't rely on any outside factors to complete the step.

Now, when you do this well and the completion of steps is really clear, it helps to create what I call a strong "chain of custody." We'll talk about chain of custody in more detail in our next lesson, but the idea behind chain of custody is just knowing who the critical player is at any given time inside a system and how responsibility for being that critical player transitions from one person to another.

The chain of custody becomes strong because, when the person in charge of a step and the person who comes next knows what to expect, progress can be maintained by both *pushing* or *pulling* forward.

For instance, if your system isn't transparent and only the person in charge of a step knows when that step is complete, then the responsibility is completely on that person to *push* the progress of the system forward by notifying the next person that the step is complete and that it's time for them to get started on their work.

No one else knows when things are done, so they can't contribute to maintaining momentum until the baton is officially passed to them.

But if the person next in line also knows when the person behind them is finished, they can take it upon themselves to get started when they notice that the work behind them is complete. They don't have to wait for an invitation to get started.

The handoff is stronger because now two people have the ability to affect momentum instead of just one. If one person messes up or forgets to notify, you can get back on track faster.

So, as another little tip, think about what kind of notification you need to have at each step of the process. What does the person in control of a step need to do to signal to the next person that it's time for them to take over.

Spend time thinking about the transitions because those are the spots where system breakdowns frequently occur.

Alright, so you have a good understanding now of what the critical pieces of a team-based system are and why they're important.

Buy-in from everyone involved as early as possible makes it easier to build something everyone will take ownership of. You want to make sure every step has a defined owner. It should be clear when a step is complete, and it's important to implement deadlines at each step to maintain momentum.

Now, let's run through a couple examples of this kind of system-building process so that you can see what it might actually look like from a high level at work and at home.

For a work system, let's pretend that we work at an advertising firm called The Best Words, and we create print ad campaigns for local businesses.

We're starting to get a lot of clients, and we need a system to make sure we do a really great job every time we need to create a new ad.

Building an advertisement takes expertise from several different people. In our firm, it takes an account manager (that'll be us) to manage the relationship with the client and make sure we hit our deadlines. It takes a copywriter to create our amazing copy. And it takes a graphic designer to give our words a visual appeal.

So, to get started, we'd want to sit down with our copywriter and graphic designer and make sure all three of us understand what it is we're really trying to accomplish. And what we want to do is create a process or a workflow so that we can create a standardized advertisement for every client we have. And we want to do it as quickly as possible and be able to give the client feedback on where we are in the creation process at any time without having to chase each other down to check in.

Assuming we all agree on that, we would then list out, together, what all the steps are that are required to go from landing a client to producing their printed ad. For this system, we'll just assume we specialize in printing flyers.

Okay, so from the high level, here are the steps we'd need to complete once we've got a new client.

First, we need to have about a 20-minute interview with the client to capture all the information they want us to include in their ad along with any ideas they might have about the creative direction they want us to take.

For this step, we want all three people involved to be in this interview so that everyone gets the same info from the client and everyone agrees on creative direction.

After that, the copywriter will kick off the process by sitting down at their desk and banging out the copy for the flyer. Then, the designer will choose images and create any illustrations necessary to build the visual style of the flyer and then lay it all out using the copy provided by the copywriter.

Before we show it to the client, we want to make sure everything looks right, so the account manager (remember, that's us) will give it a once-over and proofread it to make sure there aren't any spelling or grammar mistakes.

Then, we'll will send it off to the printer to print up however many copies were ordered by the client and, once they're back from the printer, we'll deliver them and send an invoice for payment.

And we're done!

In a real, high-profile ad agency, there'd be a lot more steps and complex system controls to ensure a really high-end product, but we're kind of a cut-rate shop, so this is good enough for us.

So, we have some of the bases covered now. We know who's doing what and we know what order it's being done in. But if we want this system to be really successful, we need to make sure there are some deadlines created so that problems or slowdowns get caught right away, and we need to make sure the account manager can see, at any time, where the campaign is at in the creation process so that they can easily report that info to the client if they ask about it.

We pride ourselves on working really fast, so we decide each step needs to be done within a day. If a project gets handed off to you one day, you need to complete your step and hand it off to the next person by the end of the next day.

We have six steps in our process, so our whole system should take about six days to complete when things go according to plan.

And because each step only gets allocated one full day, we'll know pretty quickly if things break down. Since you could get notice that it's your turn to work on a project in the morning on one day and not have to hand anything off until the end of the next day, the longest it would take to know there's a problem would be about 32 hours.

And to make sure the account manager can keep track of progress, you decide to just tape a sheet of paper to the office fridge with the name of each step and a blank space for each person to fill in the date when they start that step.

Now you can quickly see where things are at while you clean the moldy snacks out of the back of the mini-fridge.

And there you have it. A simple team system that keeps everyone in the loop, keeps the work moving, and has a built in way to catch—and hopefully fix—any problems as a job develops.

Okay, now for our second example.

You could build a similar system with even looser controls at home. Everyone has to eat and no one wants to be the only one in charge of providing food for the family, so let's imagine you're married and you have two kids. Everyone is going to get a job that helps take care of all the work required to buy the groceries, cook them, and then clean them up.

Believe it or not, you could work out a very similar system to the one we just did for the ad agency, where all four members of the family participate in a routine that takes a week to complete.

So, maybe on Saturday, everyone sits down together and you come up with a list of meals you're going to eat for the next week.

Then, on Sunday, one parent goes to the grocery store and buys all the ingredients. When they get home, everyone helps unload and stock the fridge, but one person is in charge of making sure it's done right.

Then, each day, another parent cooks dinner, and the rest of the family works together to set the table for each meal and then wash and put away the dishes afterwards.

You might run into some grumbling where one person feels like they're contributing more than the rest, but it's still a good way to start trying to spread the load, and you can divvy up the chores in a more fair—but more complex way—when you start seeing problems arise.

And now that you know all the fundamentals to building simple systems for a team, I want to encourage you to start putting one together for a team that *you* frequently work with.



You can start by outlining how *you* think it should work, but don't skip the step of getting everyone on board in the beginning to agree on the goal. And give everyone an opportunity to weigh in on how the system should work so that they take ownership of it and feel proud to be a part of it.

Set deadlines together on each step and be really clear about who owns each one so the system flows smoothly, and make sure you have some sort of notification system in place so that everyone knows who to hand off to when they've completed their step and how to do that handoff properly.

When you're finished with that, I'll see you in the next lesson.