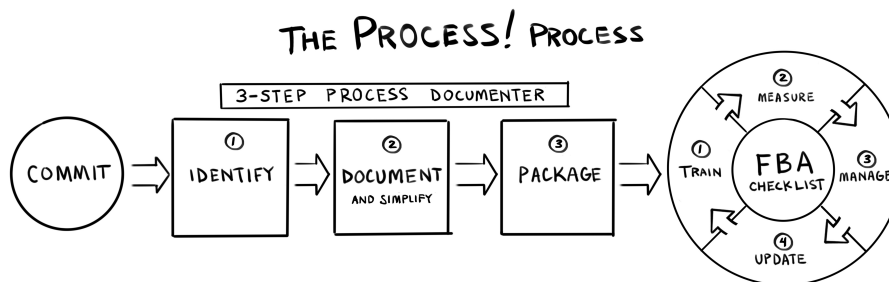


Getting Started with Process Success™ in Strey

Your step-by-step checklist for setting up the Process Success™ Followed By All framework



1 Before You Open Strey

- Leadership team has committed to process work (costs + benefits discussed)
- Core processes identified as a team (HR, Sales, Marketing, Ops, Accounting, etc.)
- Each core process has an owner assigned
 - ▶ To address the COMMIT stage of the *Process! Process*, complete our [Profit Leak Calculator](#) which will have your team understand what lack of process is costing your business
 - ▶ To address the IDENTIFY stage of the *Process! Process* schedule a 1-hour meeting with your leadership team or your EOS Implementer to Identify your handful of Core Processes

2 Set Up Your Process Page

- Click the "+" in Strey and add the Process page
- Add the Playbooks page
- Click "Create Core Process" and name your first one (start with HR)
- Choose the Process Success template for a high-level starting point
 - ▶ *The template captures the 20% of steps that get you 80% of the results.*

3 Document Your First Core Process

- Add the Purpose statement (connects to your core focus or 10-year target)
- Review the sub-processes (e.g., Recruiting, Interviewing, Onboarding)
- Edit steps as needed, but keep it high level (1 to 3 pages, not 47)
- Set the phase for each sub-process: Identify / Document + Simplify / Package
- Hit the Publish button so your team can see and use it
 - ▶ *Don't go too many layers deep on sub-steps. That's how documentation dies.*

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4 Connect to Rocks + Plan Ahead

- Connect each core process to the relevant Rock for the quarter
- Confirm the Strey owner is the same person who owns the Rock
- Plan future Rocks for getting all processes documented, simplified, and followed by all
- Refer back to the Process Success Dashboard during Rock planning each 90 days
- Use the dashboard to see all core processes and their status at a glance

▶ *If the Rock doesn't exist yet, create it first, then attach it here.*

5 Add Your Playbooks

- Go to the Playbooks section in Strey
- If you have an already-documented process, you can move it here as a Playbook
- Connect to SharePoint, Google Docs, or any outside source where your documentation lives
- Or upload the process document you want to attach directly
- Hit the Publish button so everyone on the team can access the playbook

▶ *Playbooks will eventually connect to your core processes, but are currently a separate section..*

6 Share It With Your Team

- Notify your team that the process is live and ready for use
- Process Champion collects feedback

Celebrate!

You now have access to a Process Success™ FBA Framework that will keep your process work alive and get your processes followed by all.

Additional Process Resources

- ⇒ **Process!** by Lisa González and Mike Paton (EOS Traction Library)
- ⇒ **Lisa González** lisagonzalez.com
- ⇒ **Strey** strey.com