Box Theory™
Software

Systems are Your Building Blocks to Plan, Build, and Run a Profitable Business

QUICKSTART GUIDE

Introduction

Please read this document on your computer with the Box Theory™ Software open.

"Effective business systems are the most misunderstood and underutilized tools of the small-business owner. You are now on a journey of discovery that will forever change the way you do business. Only disciplined and systemized organizations will survive, compete, and prosper in an ever-demanding marketplace. Soon you will possess what I call the Master Skill—the ability to develop highly-effective business systems and processes that please customers, remove waste and inefficiency, and put more money in your pocket. This Quickstart Guide will get you going, but I invite you to commit time every day to 'work *on* your business' (Michael Gerber, "E-Myth"). In time, the results will amaze you, and you will have a remarkable company!"

Items You Should Already Have

10 Values of a Systems Thinker	One-page pdf that will add clarity to your business perspective
Better Systems - Better Business	Eleven-page pdf primer on business systems
Business Systems 101	"Become a Systems Thinker" (17-minute video; show your employees)
The Systems Thinker Newsletter	Weekly email of tips, strategies, and best-practices to run a business
Box Theory™ Software Tool	Create smooth-running and efficient business systems and processes.
Box Theory™ eCourse	"Double Your Profit with High-Performance Systems and Processes"
Software Tip (Installation Options)	A series of email tips to help you get the most out of your software.

The Box Theory™ Business Systems Academy

The Box Theory™ Business Systems Academy is an online curriculum for business owners and managers to become proficient at creating better business systems and processes.

Course materials include: the eCourse (above), instructional videos for learning the software, and enrichment articles. The information and tips are presented in an orderly fashion to develop your skill to create effective business systems.

The Academy is like taking a university course at your own pace. You will use this Master Skill throughout your business career.

Click here to go to the Academy Home

Knowledge is Power!

Table of Contents

(Topic links are available in the bookmarks of your pdf reader.)

Mission and Purpose

Our Mission and Purpose

The Box Theory Way™ is designed to help business owners and entrepreneurs:

- Increase customer loyalty, profitability, and growth by elevating the performance of their vital business systems and processes.

- Create a business culture of discipline and excellence that exceeds expectations and achieves maximum results even when the owner is not around.

- Sell the business for top dollar, hire someone to run it, or replicate it in new markets,

With Box Theory™ Business Processes:

- **Get Organized**: Enjoy a systemized and smooth-running business operation.

- **Solve Problems:** Build business systems and processes that eliminate daily frustrations.

- **Delight Customers:** Exceed expectations with every customer contact.

- **Raise Productivity:** Develop a business culture of consistency, discipline, and excellence.

- **Slash Costs:** Dramatically reduce mistakes, waste, inefficiency, and rework by applying the principles of Six Sigma, Lean Thinking, and the Theory of Constraints.

- **Create Long-term Value:** Have others run the business for you, sell it for top dollar, or replicate it in new markets.

Better Systems = Better Business

The following fundamental principles will help you begin Systems Thinking, and discover a new way of running a business that gets exceptional results.

What You Should Know About Business Systems and Processes

- A business system is a procedure, process, method, or course of action designed to achieve a specific result that is consistent, measurable, and ultimately benefits customers. It can be as simple as a form or checklist, but always provides the best-known way to accomplish a reoccurring task. .

- Effective systems and processes (e.g., lead generation, hiring, order-fulfillment, customer service, and many unique to your operation) are the fundamental building blocks of your company. They consist of larger activities, smaller tasks, and even smaller steps within each task. The sub-systems are more detailed and specialized. For example, "interviewing job candidates" is a sub-system of "hiring" which is a sub-system of "Human Resource."

- The primary purpose of your business systems to find and keep customers, eliminate operational waste, and create differentiation and domination in your crowded marketplace.

- Creating good business systems is the practical application of laws, principles and best practices—the Master Skill of the entrepreneur. All business functions—marketing, finance, and operations—fall within the scope of this single skill mastery.

- Systems replace seat-of-the-pants operations—and everything left to chance—with detailed procedures, standards, and accountability. You are saying to your people, "This is how we do it here!"

- Effective business processes provide quality, efficiency, and low-cost products and services, giving customers the best value and stakeholders the greatest return.

"At its core, a fully functioning business is basically a set of systems and process." — John Jantsch, Duct Tape Marketing

- Like a recipe, there are only two ways to improve a system or process: 1) Improve the procedure or steps in the process or 2) improve the component parts or ingredients used in the process.

- Putting ordinary people into well-designed systems yields extraordinary results; "let systems run the business and people run the systems" (Michael Gerber, "E-Myth").

- Ongoing system development promotes continuous learning, growth, and improvement of individuals and organizations; innovation at the system-level drives all progress.

- The financial benefit of good business systems far exceeds the cost of their development; the payoff is often immediate and dramatic. The true long-term value of a business is found in the maturity of its business systems and processes—their ability to consistently produce desired results.

The Box Theory Way™

The [Box Theory Way™](#) is a unique methodology that incorporates powerful principles into a software tool for creating and improving business systems and processes. It is designed for the small and midsize business.

Simply Put, A Box is a Business Activity, System or Process

- The Box Theory™ method consists of breaking your business down into bite-size and manageable systems and processes, the repetitive activities you do every day to get work done in sales, operations, and administration.

- A variety of terms are used when speaking of routine business activities. In Box Theory™, each term—a task, procedure, or step of a process—refers to a BOX. The Box Theory Way™ focuses on improving the vital few BOXES (systems and sub-systems) that are most responsible for your success,.
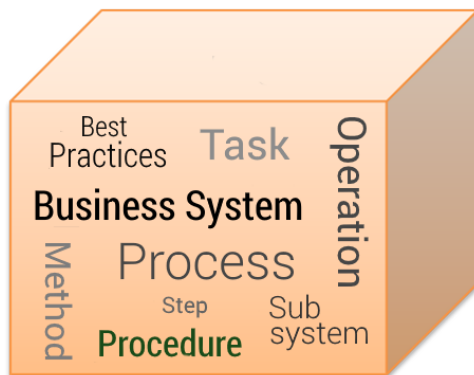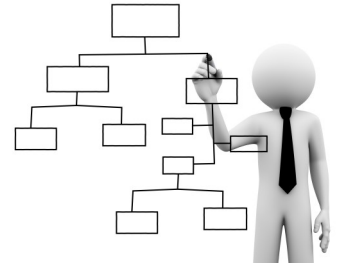
- Your business is made up of many systems and processes. Each consists of larger activities, smaller tasks, and even smaller steps within each task. Every activity, task, and step can be represented by a BOX on an organization chart or process flowchart. Every BOX is of greater or lesser value to your organizational strategies and goals, and currently produces results that are either acceptable or unacceptable.

- **BOX THEORY™, (the actual theory), is this: If you can determine the vital few BOXES that cause your key business outcomes, and elevate them to higher performance levels, the effect will be greater customer loyalty, profitability, growth, and overall business success.** [(See further explanation and examples)](#)

- The Box Theory Way™ allows any organization to be viewed as a collection of individual BOXES. Focusing on a single essential BOX quickly reveals the root-cause of frustration and problems as well as their obvious solutions. It shines a light on the critical details where problems and profits are generated.

- In Box Theory™ Software, seven high-performance attributes are potentially associated with a business system/BOX. Each attribute is a quality that improves the output of the system. Thus, you can elevate the performance of any system—or BOX—by taking steps to increase the number of its high-performance attributes. For example, if the business system has an owner with accountability, it will achieve far better results than a system without an owner. ([See other six attributes](#); bottom of page)

- For a more complete understanding of how BOXES are used, [click here](#). (This linked information will also come to you later as one of the "Software Tips")

The Software Features

Below is a brief overview of the features of Box Theory™ Software .

For more detailed information click here (scroll down)

General Software Features	Silver Edition	Gold Edition	Multi-Company
Organization Blueprint	✓	✓	✓
Org Chart/Systems Framework	✓	✓	✓
System Checklist Creator	✓	✓	✓
Process Map/Flowchart Creator	✓	✓	✓
System Components Manager	✓	✓	✓
Document/Template Manager	✓	✓	✓
People/Team /Policies Manager		✓	✓
Job Description Creator		✓	✓
Quality Improvement Tools		✓	✓
Efficiency Improvement Tools		✓	✓
Process Performance Tracking	✓	✓	✓
Auto-Backup, Import, Export	✓	✓	✓
Unique Box Theory™ Method	✓	✓	✓
Business Process Management		✓	✓
Unlimited Company Databases	✓		✓

Box Theory™ Gold

Software Tour
- Introduction
- Software Highlights
- Wrap-up

BOX THEORY™

A powerful tool for creating business systems and processes!
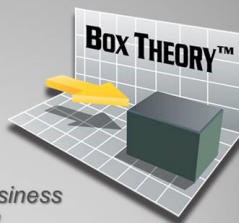
Please Watch Video!.

You will learn more about the software in 11 minutes than anything else you can do.

Click Here for

Software Tour

The Software Home Page

Every time you open the software you are first taken to the HOME page, You can also return to this page from anywhere in the software by clicking on the "HOME" button in the upper left corner of the page. More information is available for each section of the HOME page (see page 26 below). <u>Note 1</u>: The "T" at the top of the "Recent Documents" section below will take to you the Document Template Manager. <u>Note 2:</u> Much of the functionality of the software is accessed by right-clicking your mouse-button on the text or in a space..

Navigate from the Home Page to favorite systems, recent docs, notes, measurement reports, the organization blueprint, and many other resources.

Your Organization Blueprint

It is a good idea to create an *operational business plan* (different than a plan for investors or bankers) that will allow you to create systems and processes that are aligned with your mission, vision, strategy and goals. The software will help people and systems push together to accomplish the vision and goals of your organization. The Organization Blueprint is accessed from the Main Menu and each of the ten steps is listed in the left-side Navigation Panel. The **Action Plan** button at the bottom of screen is where you do all your planning work in each of the ten sections.

Create an Organization Blueprint:

1. **Mission Statement** (Why do you exist?)

2. **Values Statement** (What are your core values?)

3. **Vision Statement** (Where do you want to be in five years?)

4. **Voice of the Customer** (What do customers expect from you?)

5. **Voice of the Employee** (How do you retain your best employees?)

6. **SWOT Analysis** (What are your strength, weaknesses, opportunities, and the threats you face?)

7. **Strategy** (What is your unique game plan?)

8. **Balanced Scorecard** (What are your company goals/action plans?)

9. **Organizational Structure** (What business activities are you engaged in?)

10. **System Framework** (What business processes must you excel at?)

"A good plan is like a road map: it shows the final destination and usually the best way to get there" — H. Stanley Judd, "Think Rich"

Plan Your First Boxes

The Last two steps of the Organization Blueprint are the beginning of your work with BOXES. They include the Organization Chart and the System Framework. The Organization Chart is a high-level view of your organization's major activities (e.g., marketing, operations, administration). In the System Framework, you identify your major systems and sub-systems by name. Prioritizing your system-development work will allow you to focus on the systems easiest to implement and with the biggest payoff. (See "Software Help" button for prioritizing.)

Box Theory™ Gold Multi-Company - Road Warrior Mountain Bikes

File   Edit   Find   Print   Help   Organization Blueprint   Box Theory™ Systems   System Framework   Measurement Reports   Backup Now

Recent Places ▾ ⇦ ⇨ HOME

System Framework

Road Warrior Mountain Bikes
Organization Blueprint

Mission
Values
Vision
Voice of the Customer
Voice of the Employee
SWOT Analysis
Strategy
Balanced Scorecard
Organization Chart
System Framework

Systems/boxes
Total: 67

Display ▾ Level ▾ View Selected List ▾

Systems/boxes	Balanced Scorecard Driver	Constraint, Weak Link, Bottleneck	Potential Big Payoff	Cause of Frustration	Easy to Implement	Priority-Score
Road Warrior Mountain Bikes						
Business Development Department						
Business Development	☑	☑	☑	☐	☐	8
Product Development	☑	☑	☑	☐	☐	8
System Development	☑	☑	☑	☑	☐	9
Marketing and Sales Department						
Market Research	☐	☑	☑	☐	☐	5
Lead Generation/Advertising	☑	☑	☑	☑	☐	9
Marketing/Sales Materials	☐	☐	☐	☐	☐	0
CRM Database Software	☐	☑	☐	☐	☐	3
Lead Conversion/Sales	☑	☑	☑	☐	☐	8
Website	☑	☑	☑	☐	☐	8
Workshops	☐	☐	☐	☐	☐	0
Administration Department						
Accounting/Tax	☐	☐	☑	☐	☐	2
Information Systems	☐	☐	☐	☐	☐	0
Operations Department						
Purchasing	☐	☐	☐	☑	☐	1
Receiving	☐	☐	☐	☐	☑	1
Pricing	☑	☐	☑	☐	☑	6
Manufacturing	☑	☐	☑	☐	☐	5
Inventory Management	☐	☑	☑	☑	☐	6
Customer Care	☑	☐	☑	☑	☐	6
Safety/OSHA	☐	☐	☐	☐	☑	1
Product Delivery	☑	☑	☐	☐	☐	6
Home Theater Installation	☐	☐	☐	☐	☐	0
Food Service	☐	☐	☐	☐	☐	0
Human Resource Department						
Hiring	☑	☑	☑	☑	☐	9

Principles **Action Plan** Examples Worksheet System Notes Video Help Software Help   ✂ 🗐 📋 ↶ | **B** *I* U̲ | ☰

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Identify your major business systems and processes. Set priorities for their development and improvement.

Create Box Theory™ Systems

Like a recipe, there are only two ways to get better results from any business system—improve the procedure or improve the component parts (ingredients). Using Box Theory™, you will know exactly how to create, diagnose problems, or improve any business process. With each System/BOX in the software, you will address six areas of focus with tools for each on the Taskbar. They are described below with links to software screenshots.

The Six Elements of Every Business System or Process	
1. Process	Are your core processes—whether in the office, the store, the workshop or the factory—mapped or flowcharted? Are they smooth-running, with minimal bottlenecks and downtime, and with few mistakes or rework required. Does your customer—either directly or indirectly—benefit by each step in the process?
2. Components	Do you have all of the forms, checklists, scripts, reports, brochures, databases, equipment, software, tools, supplies, and everything necessary for workers to make the system operate effectively? Missing or underperforming components are the cause of many weak business systems.
3. People	Are your people the right fit for their job? (People are components, too.) How good are your hiring, training and communication systems? Do your systems include elements of accountability and motivation? Blame poor systems before you blame people. Effective business systems leverage ordinary people to produce extraordinary results.
4. Quality	Are your products or services delivered as promised? Do they meet customer specifications and expectations? Does your process have minimal mistakes, waste, rework or returns that drive up cost? Anything "critical to quality" for the customer should be important to you, or they will shop elsewhere.
5. Speed	Is the System efficient? Are workers productive? Do customers get served fast or on time? Could you reduce waiting time, delays, "speed bumps" and bottlenecks in your process? Speed increases customer satisfaction, productivity, sales capacity, and cash flow cycles, while lowering costs. Improving the *throughput* of products and services will drive growth and profitability.
6. Measurement More Tools	Do you manage by the numbers? Do you measure performance of your core business systems? Continuous measurement and feedback drive all process improvement. Establish measurements that let you know every day how you stand in relation to your business goals. Strive to better your best.

"If you can't describe what you are doing as a process, you don't know what you're doing."— W. Edwards Deming, Total Quality Management.

The Taskbar and Toolbar

Most of your work in Box Theory™ Software is accessible from *one* or *two* menu bars at the bottom of the Task Window (the large main window). Below is a brief review.

System Taskbar – In "Box Theory™ Systems" on the Main Menu, there are specific things you can do—**Action Plans**—to create or improve the selected System in the Navigation Panel (orange background). Simply choose what aspect of the System/BOX you want to work on—Process, Components, People, Quality, Speed or Measurement. The down-arrow opens a list of available **Action Plan** tools as pictured below for "Process."
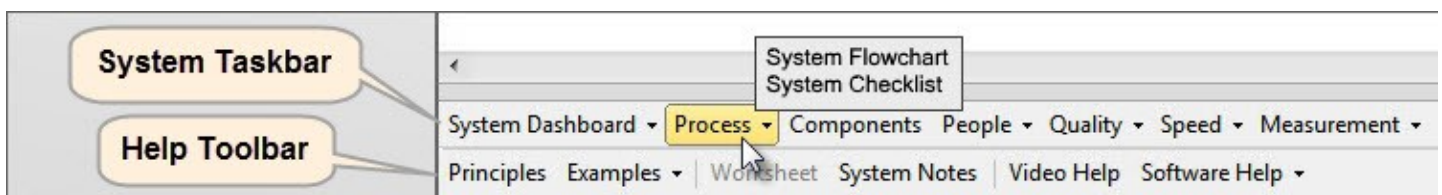
Help Toolbar – The Help Toolbar is below the Taskbar when working on your business systems. The buttons provide options that will help you in the process of creating your Organization Blueprint or creating and improving a System/BOX. The tools are described as follows:

- Principles – This includes the foundation principles you should understand and apply to the System,/ BOX you are working on. It is the related chapter contained in the Box Theory™ eCourse.

- Action Plan – In the "Organization Blueprint," this button is where you do your planning. In "Box Theory™ Systems," the entire upper Taskbar is a series of **Action Plans** for each of the six areas of focus.

- Examples – This shows a real-world example of a completed **Action Plan** page, including the System Dashboard, Process, Components, People, Quality, Speed or Measurement.

- Worksheet – This is an exercise available in some sections to stimulate your thinking and help you prepare for completing the **Action Plan**. In some cases, the "Worksheet" is a tool for developing supplemental information such as a budget. Worksheets are helpful, but optional.

- System Notes – You will often get ideas while you are working on a system. "System Notes" is a text editor that allows you to jot down your thoughts or ideas for future reference.

- Video Help – For some sections of Box Theory™ Software, a screen-capture video will give you visual instructions or walk you through a process. The videos may be slightly different than what you encounter as occasional changes and improvements are made to the software.

- Software Help – This is the primary written instruction and help pertaining to the functionality of a specific section of the software. "Software Help" is available in the Organization Blueprint, but particularly useful in the Box Theory™ Systems area. *I recommend you look here for quick answers to questions.*

Managing Sub-systems (1)

Box Theory™ is unique in its ability to recognize the importance of sub-systems and sub-processes. The daily work going on in your business consists of larger activities, smaller tasks, and even smaller steps within each task (like a paragraph > sentence > word > letter). Marketing, for example, is a high-level business activity or system. Within marketing, you will likely have a system for generating sales leads. Within the Lead-Generation system, you may have tasks or sub-systems such as Telemarketing, Direct Mail, and Radio Advertising. In Box Theory™, you only work on the lowest-level System/BOX required to get the desired result. In the image below, Direct Mail is the focus of attention. Root problems are found in the details of these lower-level sub-systems which become increasingly specialized as they cascade down through the organization.
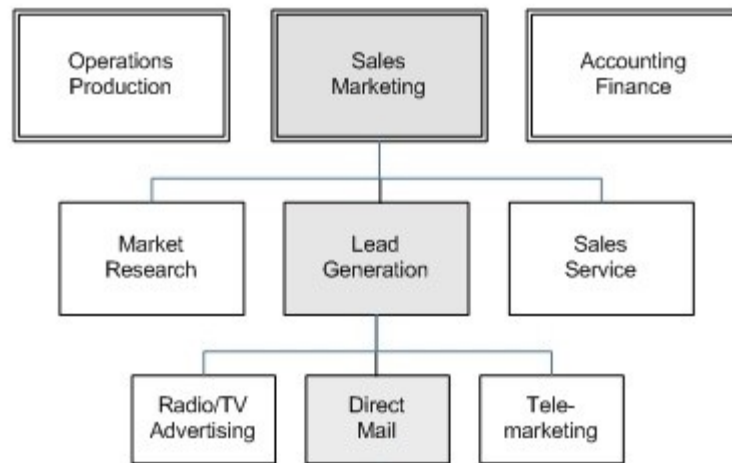
After clicking "Box Theory™ Systems" on the Main Menu, you will see the Navigation Panel on the left side of your screen (see image on next page). Consistent with Box Theory™ logic, each BOX is a system and contains lower-level BOXES or sub-systems.

"In order for any business to succeed, it must first become a system so that the business functions exactly the same way every time down to the last detail." — Rick Harshaw, "Monopolize Your Marketplace"

The image on the next page, shows the Navigation Panel with the Company BOX on level 1 (Roman numeral I). On level 2, you see the department name (Operations). On level 3, you see the System that is being worked on—Manufacturing (orange background). On level 4, you see the steps within that System. If you want to work on the "Paint" system for example, just double-click on Step 3, and it will become the current System, (orange background). If you want to work on a different system in the Operations Department, double-click on the department and below it will display other Systems such as Customer Service or Shipping/Receiving.

Managing Sub-systems (2)
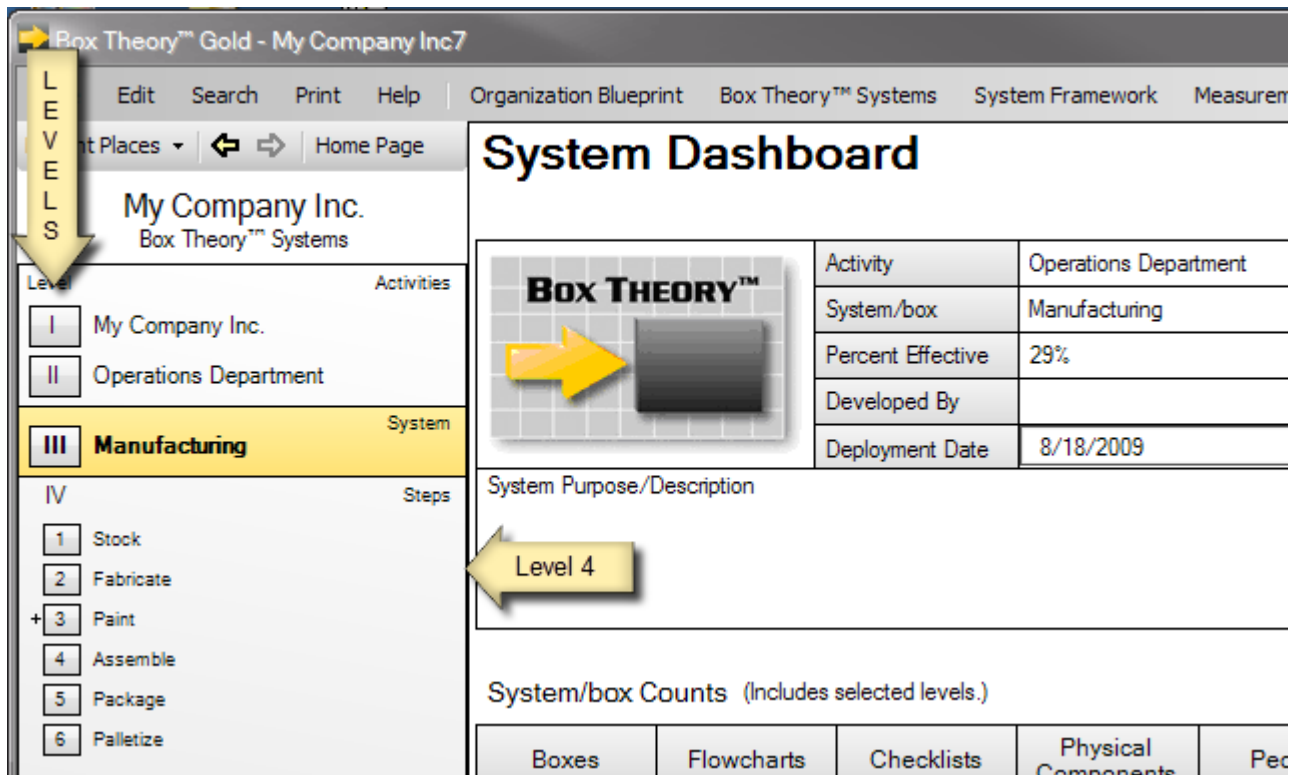
When working on a business System/BOX, it is sometimes desirable to see what is going on at other levels. Wherever you see the "Level-viewer Tool" (shown below) you can click on any of the levels for a different view. For example, if you wanted to see all the documents used in Lead Generation, you could click on the next level down to see a list that also includes the documents for Radio Advertising, Direct Mail, and Telemarketing. As you become familiar with the software, this tool will be handy to see more or less information. The Level-viewer is described more fully in the "Software Help" wherever the tool is displayed.
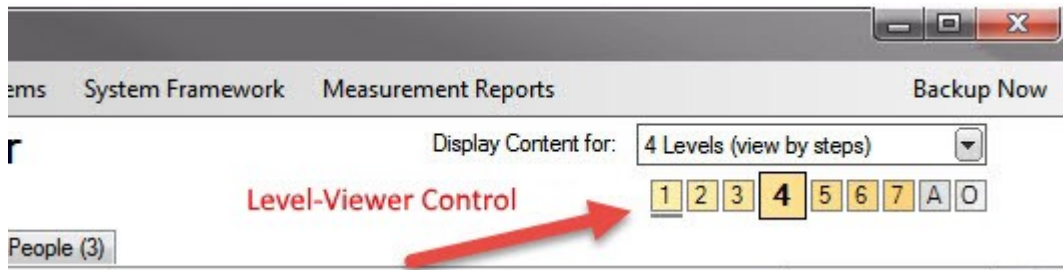
Don't Forget to Right-Click

By right-clicking your mouse in the Navigation Panel and most other sections of the software, a pop-up list will indicate the actions you can take, such as adding, renaming, deleting, moving, and so forth.

When you add a System/BOX in the Navigation Panel, the System Framework is also updated. In fact, when a System/BOX is added, modified or deleted anywhere, all other areas of the software are automatically updated.

Getting-Started Checklist (1)

First Things First

❑ Install Box Theory™ Software and eCourse, and register your activation key. If you haven't already, sign up for "The Systems Thinker" newsletter. Add us to your contacts, address book, or safe-senders list. Read this document and explore the links. Spend time each day at the Business Systems Academy. Complete your Organization Blueprint and then begin to create or improve your first business systems.

❑ Find a quiet time and place—preferably in the early-morning—to study and work on improving and building value into your people, products and processes. Focus on how you can please customers, encourage learning and growth of employees, eliminate waste and inefficiencies, and increase profitability.

❑ Become a Systems Thinker; look at everything in your business from a systems perspective. Use customer or employee feedback, performance data, and personal frustration to guide your problem-solving activities. Remember: every thing you learn from experience, system feedback, worker suggestions, outside consultants, personal study, or seminars and workshops, *is of no value unless you go back to Box Theory™ Software and modify a procedure or component part.* This is the only way to improve any business.

❑ If you have a system-improvement team, the business owner often takes the lead. He or she is responsible for all improvement projects and has the authority to make decisions for the company. Other managers can play a role on the team; however they should also be Systems Thinkers!

❑ Create a regular time and location—at least weekly—for a System Improvement Workshop. Discuss with your team ways to innovate and achieve better results. Focus on one or two systems at a time.

Create Your Organization Blueprint

❑ Lay the foundation for creating your business systems and processes by completing the 10-step Organization Blueprint (Main Menu bar of the software). Steps 1-7 include your mission, values, vision, what your customers and employees expect from you, your unique game-plan or strategy, and your company goals.

❑ Create an Organization Chart for your company (Step 9). This visual description of the structure and relationships within the organization is your most fundamental business system, and your first BOXES. All other Systems/BOXES fall within a specified job functions on this chart.

❑ Complete the System Framework (Step 10) to identify the names of the major systems in your company. In Box Theory™ Software, Level 1 is your company name. Level 2 are the several general department names from your org chart. Add other primary systems to level 3 and maybe level 4 (see the Examples page at the bottom of the Task Window). You now have the skeleton/framework for your business. You can add, delete, or modify the System Framework later, so just get it roughed in when doing the Organization Blueprint. Determine each system's Priority Score and select the first system you want to create or improve. The "Software Help" at the bottom of the page will explain the simple scoring system.

Getting-Started Checklist (2)

Developing High-Performance Systems

❑ From the priority score in the System Framework, choose a system to create or improve. Start by developing or improving the business systems that have the biggest payoff—those that are essential to your success or obstacles in your path. Systems that help you find and serve customers are high priorities. Focus efforts on one or two systems only for fastest results. Then move on to others.

❑ Select "Box Theory Systems" on the Main Menu. In the left Navigation Panel, double-click on the listed "Activity," "System," or "Step" until you find the name of the system you want to work on (they are in the same order you created them in the System Framework). Double-click on a "Step" to make it the current "System" (orange background). This is the System/BOX you will now create or improve.

❑ Once you have chosen a system to work on, you will perform the actions at the bottom of the Task Window. There are six major areas to consider. In "Process," you will create a flowchart, checklist, or both to describe the specific steps in the business system or processes. Next you will identify and acquire the major "Components" that are necessary to make the system work effectively (e.g., documents such as a form, contract, spreadsheet, or brochure, and software, equipment, materials, supplies, and so forth).

❑ In the Box Theory™ Gold version, you will also add 'People," teams, and policies. In addition, there are tools to diagnose problems with system "Quality" or "Speed" (efficiency), and to determine action plans for improvement. Finally, in the Gold and Silver versions, you can create performance-measurement reports in minutes. Note: you only use the software tools you need to get the desired results for each System/BOX. Print checklists or any resource documents for people to use during operation. It's all easy and logical.

❑ Elevate system-performance over time by applying the "7 High-Performance Attributes" (e.g., increase quality and speed; eliminate bottlenecks, and so forth). (See "Box Theory™ - What is It?"; bottom of page)

Getting-Started Checklist (3)

Other Notes Of Interest

- About 20% of your System/BOXES have the most influence on your business results. Determine the vital few BOXES that drive the success of your business and elevate those BOXES to higher-performance levels.

- Many systems can be created quickly and are as simple as a checklist. Others are more complex and better displayed using a flowchart. However, good systems are as simple as possible to get the desired result.

- Acquiring all the necessary system components is usually the most time-consuming and sometimes expensive part of creating a new system. List the major components needed for each step in the process. (e.g., form, checklist, equipment, supplies, etc.). Assign people to find, create, or buy them..

- If you are working on systems with a team or in your weekly business improvement workshop, you can easily whiteboard the system procedure or steps, identify the major components for each step, and get the information into the software while the meeting is in progress. With discussion this may take up to an hour.

- When whiteboarding a system flowchart, keep in mind that every process has a specific starting point and ending point—boundaries. Begin by identify the first and last step of the process you are working on. Be sure you don't overlap steps with other systems. A system generally has only one measurable goal. If there is more than one objective, you have probably combined multiple systems.

- To avoid missed expectations and wasted time, anyone working on business systems should get approval from the person in authority for the system design and budget before beginning implementation.

- Get employee buy-in to a new system by including them in the development process. Teach the team how the new system will work and what is expected of them. Perform any formal training that would improve their skills. Deploy the system with careful orchestration of people and resources to get people off to a good start and avoid natural resistance.. Be sure that your *customers* are not adversely affected during the transition. Continue to operate the system the same way every time until you discover a "new best way."

I hope I haven't included too much detail in this Quickstart Guide. While it may seem overwhelming, I assure you that it will soon become "second nature", and like most skills, you will do it without even thinking about it. In fact, you are doing most of it already and just don't realize it. *Also, don't forget to see the principles, examples, worksheets, and the software and video help. "A picture or example is worth a thousand words."*

EXPECT A BIG PAYOFF. AND REMEMBER, "THERE IS NO OTHER WAY!"

"Organize around business functions, not people. Build systems within each business function. Let systems run the business and people run the systems. People come and go but the systems remain constant." - Michael Gerber, "E-Myth"

Final Comment

No matter what size your business, what industry you are in, or whether your operation is in the office, the store, the workshop or the factory, your customers, employees, and stakeholders (YOU) will ALL benefit by your effort to create exceptional business systems and processes. It's a WIN-WIN-WIN.

I recommend you set aside at least 60 minutes every day to work in 'The Zone" on your business. There is no better use of your time than building long-term value into your people, products and processes. The Box Theory Way™ is not just about learning principles; it is about applying principles for measurable improvements. It's about developing real systems and processes that enable you to please customers, retain good employees, make money, and build a company you can be proud of.

There is a lot of helpful information in this Quickstart Guide and the other resources listed on page 3; however, system development is really quite simple and intuitive. Here it is in a nutshell.

1. A business consists of a collection of systems (BOXES) for getting work done.

2. 20% of the BOXES have the most influence on your business results (80-20 Rule).

3. Identify and prioritize these vital few or under-performing BOXES (in the System Framework).
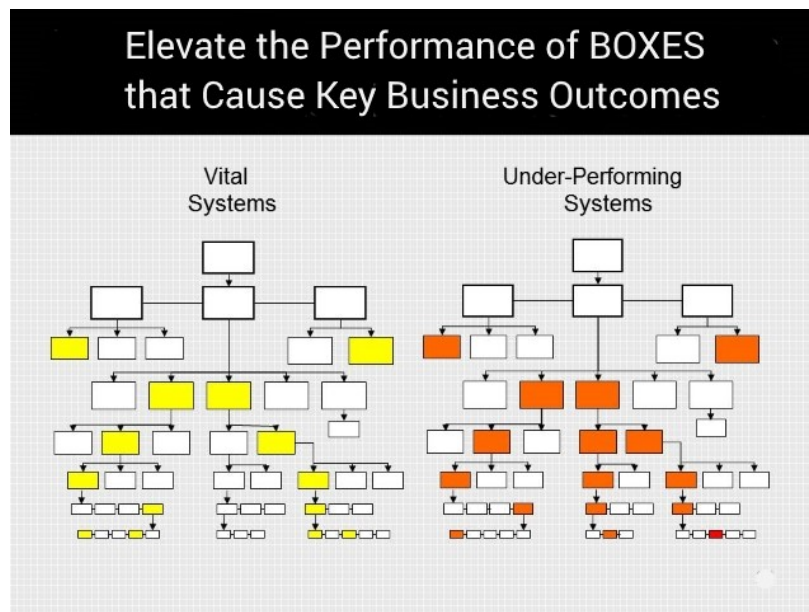
4. Elevate the performance of your critical BOXES by applying the 7 high-performance attributes (using the tools in Process, Components, People, Quality, Speed, and Measurement)..

5. Continue improvement until desired results are achieved.

Like any skill, a little time and determination will reap enormous benefits. But, since you HAVE to develop good business systems anyway, Box Theory™ Software will cut your time in half and give you the very best result.

Start with the Organization Blueprint, have fun, and let me know if there is anything I can do to help!

Appendix

The following Appendix includes the four general Help topics available from the Main Menu of the software, This information covers some of the less-obvious aspects of the Box Theory™ Software,. While the Appendix may be a little dense to read, I recommend you at least skim over the topics to know what is there. You will pick up some useful information that will enhance your experience with this powerful software tool.

Below are also some links to articles and web pages might quickly expand your understanding of the Box Theory™ principles and software. However, much of this information will come to you in time via the "Software Tips" and weekly newsletter.

ENRICHMENT ARTICLES, TIPS , OTHER RESOURCES

Product Installation and Other Software Tips

Box Theory™: All About Boxes

Your First Business Improvement Workshop

10 Values of a Systems Thinker!

Four Stages to Becoming a Systems Thinker

Business Owners: Your Role in Creating Remarkable Business Systems

Business Startup: Your First Business Systems and Processes

The Art and Science of System Building

10 Easy Steps to Grow the Perfect Business - Table of Contents

Box Theory™ Business Systems Academy (a self-paces learning center)

Box Theory™ Gold or Box Theory™ Silver Features and Benefits (look below the slideshow)

Frequently Asked Questions (fourteen answered questions you may find helpful)

Success Stories (examples of improved business systems)

What Customers Are Saying (a few comments from those who have experienced the Box Theory™ Way)

Quotes about Business Systems (what experts say about business systems & processes)

Better Systems = Better Business (getting-started primer for better business systems & processes; 11-pg pdf)

Box Theory™ Software Tour (an 11 minute overview of the software.)

Business Systems 101 Webinar (17-minute video "Become a Systems Thinker"; show your employees)

All Wealth is Based Upon Systems (6-minute video with four BIG Ideas)

Box Theory™ Small-Business Advisor (become a heroic small-business coach)

Appendix 1.1: Software Main Menu

MAIN MENU OPTIONS

The "Main Menu" bar across the top of Box Theory™ software displays tasks you can perform within the software. With each selection, the Navigation Panel and/or the Task Window change to provide the desired working environment. The Navigation Panel, on the left side of your screen, shows the tasks or boxes you can work on. The Task Widow—the main part of the screen—is the actual working area. Below are general descriptions of each item on the Main Menu

File – You can use Box Theory™ Gold Multi-Company version for an unlimited number of organizations. More than one company can also be open at the same time. If so, you will see a Box Theory™ icon for each open company on your Windows task bar. In the Multi-Company version, select "New" to set up a new organization and "Open" to load any of your existing organizations. At first launch, the program automatically opens to the organization you were working in last. You can also do a "Save As" to create a whole new organization with the same Organization Blueprint, System Framework, and all components—a duplication of the database. For easy access, up to six recent company files are displayed from the menu. (Box Theory™ Gold and Silver are limited to one organization and database. Therefore, the "New," "Save As," and "Open Recent" buttons do not appear.)

In the File area, you can also Export or Import all or part of your Organization Blueprint to and from another Box Theory™ company database. The exported file has a ".blu" file extension." Note: Of the ten Organization Blueprint Action Plans, you can only Export and Import the first nine. You cannot export/import the System Framework because it is deeply integrated into each unique company database.

File > Administration – The Administration area provides a dialog box with tabs for performing various administrative tasks. They are as follows:

- People – Add the names of people (a few or everyone) in your organization to a company roster. The names will show up in several places of the software on a drop-down list for creating system teams or assigning job descriptions.

- Backup– Box Theory™ Software continually saves your company database while you are working. It also allows for a backup database to be created each day that you are in the program. You can click the "Backup Now" button on the right side of the Main Menu at any time to perform a manual save of your company's backup database. It's a good idea to do this occasionally throughout the day. You are also prompted to back up the database when you exit the software.

    Box Theory™ Software puts backup files of your company database in the "BTG Backup" folder located in your company folder—YourCompanyName (BTG). The file extension for all company database files is ".btg."

Appendix 1.2: Software Main Menu

Box Theory™ Software creates one backup file with your company name and today's date every day you are in the program. If you uncheck the box, "Delete Old Backup Files," an unlimited number of daily back-up files is maintained. If the box is checked (by default), files are saved for the three most recent days and a week apart for approximately a month. You will have up to eight backup files on your computer at one time. In File > Administration > Backup, select "Open Folder" to view your backup files. You can delete files manually at any time.

- <u>Restore</u> – Under the Restore tab, you will see a list of available backup files and dates. Select, open, and verify the file you want to restore. Then simply click the button on the Main Menu that says, "Restore Open Backup." This will make the open backup file your current company database. It will also rename the old company folder with today's date. When satisfied, you can delete the old folder and its contents.

  Restoring a Component Document Only – If you have a lost or corrupted document file (Word, Excel, PowerPoint, etc.) that you need to restore from a backup database, you can quickly do it from within the current active database. Right-click in the Component Manager. Go to "Import Document > "Restore Document from Company Backup Database." Select the system and then the document to restore. Click "OK" to import the document into the current system. You may need to rename it.

  Restoring a System/BOX Only – When you have a company backup file open, you can select a System/BOX in the System Framework and export its entire contents. Then import it into your current company database. This is a fast way to restore a single system. You can then delete the old System/BOX that you are replacing

  <u>Preferences</u> – By default, the English Spellcheck is enabled. You can switch to the Spanish Spellcheck or disable Spellcheck altogether. Because a lot of "loose" writing is possible in the Notes area, spellcheck can be disabled to avoid frequent red-underline words.

<u>Edit</u> – This standard menu item allows you to undo, select, cut, copy, and paste text. These functions also appear on the Toolbar at the bottom of the Task Window. You can use Ctrl-Z (undo), Crtl-A (select), Crtl-C (copy), Crtl-X (cut), and Crtl-V (paste) anywhere within a text box.

<u>Find</u> – Search your organization database by selected categories or all categories using a keyword search. Each search will bring up a list of the items that meet the search criteria. The search will look for a string of characters that match the keyword search criteria (e.g., if you search for improv, it will bring up hits such as improve, improving, improvement). If you put quotation marks around several words, it will find all occurrences of that exact phrase (e.g., "quality and efficiency"). Keywords are highlighted and shown within context. Double-click to go to that document or area of the software. In addition, you can create your own personal Bookmarks for quick access to anywhere in the software. Right-click on the bookmark to rename or delete it.

Appendix 1.3: Software Main Menu

Print – Printing goes above and beyond in Box Theory™ Software. You can print any page or document as you normally would print with the document open, or from the "Print Current Page" area of the Main Menu.

You can also print an entire group of perfectly formatted documents such as the ten parts of your Organization Blueprint. What's more, you can print a Systems Document with all of its component parts such as the flowchart, checklist, policies, job descriptions, and measurement reports, as well as the documents you have created in Word or Excel—all with a single click on the "Print" button.

Because there are potentially many printable pages and documents within the software, you have two ways to narrow down the number of items you print in a Systems Document. When you create a flowchart, checklist, component document or measurement report, you are given a checkbox (upper-right corner) to "Include in Printing." When this box is left unchecked, your supporting, secondary, or incomplete documents will not be included in the System Document.

Secondly, when printing the multi-part Organization Blueprint or the Systems Document in the "Print" wizard on the Main Menu, press the "Document Options" button to select the specific documents that you want to include or exclude. Checked boxes will print; unchecked will not. Use the level-viewer to also include documents in the lower-level sub-systems. With the print wizard, you can completely customize your major documents.

Note 1: Sometimes you may want a document to start at the top of a new page to prevent it from spanning multiple pages. If so, click on the checkbox until a dark square fills the box. This tells the printer to start the document at the top of the next page. You can use the "Show Preview" button to see how your complete document will look and make necessary adjustments before actually printing the entire document.

Note 2: In a typical system, you may also have several documents you would print as part of the "System Document" such as forms, reports, and so forth. These documents are often given to the system operators to carry out their jobs. However, many documents listed in the Component Manager are likely to be resource or supporting information you don't want to print as part of the System Document. For those documents that you want printed, check the box, "Include when Printing System Document. This check-box is found when creating or editing the document (In the Component Manager, right-click on the document and select "Edit Component Info. See the printing check-box at the bottom of the dialog window.)

Note 3: Be sure to set the level-viewer in the upper-right corner of the Document Options to include all the documents that you want to print. Remember that the number of documents grows exponentially as you include more levels. The print preview will tell you how many pages will be printed. Remember: Any flowcharts or checklists that are to be printed must have the "Include in Printing" box checked at the top of the flowchart or checklist page. In addition, when printing a checklist, you have the option of embedding sub-checklists into the primary checklist, or printing them separately.

The printing feature alone will save you hours of finding, gathering and organizing documents. It is a powerful tool, designed to make your life easier.

Appendix 1.4: Software Main Menu

Help – There are a variety of sources to help you implement the principles of Box Theory™ and Box Theory™ Software. By selecting "Help > Help Content" from the Main Menu, you will see several general help documents. Please refer to the document, "Help Resources," to learn the various types of help contained within the software. From the "Help" button, you can also "Submit a Bug" or suggestion for a software enhancement. In "About Box Theory™ Software," you can verify whether you have the Gold, Silver or Multi-Company edition, and see the last update and version number of your software.

Organization Blueprint – Begin defining your business with the Organization Blueprint. This ten-step section will help you define who you are, where you are going, and how you are going to get there. The ten steps, as seen in the Navigation Panel, will take you through Mission, Values, Vision, Voice of the Customer, Voice of the Employee, SWOT Analysis, Strategy, Balanced Scorecard (goals), Organization Structure, and the System Framework. The Organization Blueprint ensures that the systems you develop will drive your company n the direction of your vision and goals.

Box Theory™ Systems– Selecting this option will load your systems in the Navigation Panel on the left of your screen and prepare you for creating or improving individual Systems/BOXES. This is the heart of Box Theory™ Software and will be where you spend most of your time.

Once you select a System/BOX to work on, you will go to the "Taskbar at the bottom of the Task Window. There you will select tasks to develop or refine a system—Process, Components, People, Quality, Speed or Measurement. The System Dashboard and High-Performance Attributes provide summary information about the system.

After selecting the System/BOX, you will use the Toolbar below it for help in accomplishing your system development work. The buttons provide Principles, Examples, Worksheets, System Notes, Video Help and Software Help. See the next section of this document or the software Main Menu > Help > "Navigating Box Theory™ Software" for more information about each of these buttons. LINK……………..

System Framework – You will complete the System Framework as the last step of the Organization Blueprint. However, this is the one place in the software that you can see all of your systems in a Microsoft-style directory tree. You can also view development priorities and your progress with the High-Performance Attributes. This option is located on the Main Menu for quick access to your all of your organization's Systems/BOXES.

Measurement Reports– From this drop-down list, you can quickly access the measurement reports created by the Report Wizard or the Spreadsheet Reports you have created using a Microsoft Excel. Select the report name and open it for viewing or data entry. For quick data entry, this Main Menu list includes all measurement reports you have created.

Appendix 2.1: Software Navigation

BOX THEORY™ LOGIC

After clicking "Box Theory™ Systems" on the Main Menu, you will see the Navigation Panel on the left side of your screen. Box Theory™ Software navigation follows the Box Theory™ logic. That is, each box is a system and contains lower BOXES or sub-systems. You can drill down from the top of the organization to the lowest BOX or sub-system within the organization. The list of systems or BOXES that you see in the Navigation Panel is what you added in the Systems Framework section of the Organization Blueprint. You can add more BOXES (systems) at any time. The Task Window is the large center window where you will do most of your work.

NAVIGATION GUIDELINES

Finding a System/BOX – You can find the System/BOX you want to work on in five different ways:

1. Double-click (or right-click menu) on a System/BOX name in the System Framework
2. Drill down and select a System/BOX in the Navigation Panel.
3. Search for a System/BOX by keyword from the Main Menu > Find > Search
4. Go to a system from a custom Bookmark you set up from the Main Menu > Find
4. Select a BOX you were recently in by using the "Recent Places" button.
5. Use the "Forward-Backward Arrows" to move to places visited in the current session.
6. Click on the System/BOX name on your Home page list of Favorite Systems.
(You'll probably get into a habit of using a couple of these methods.)

Navigation Bar – Just above the Navigation Panel and below the Main Menu is a short menu bar called the "Navigation Bar." The two arrows allow you to go backward or forward on the Task Window in similar fashion to a web browser. The "Recent Places" button shows a list of places you have recently been working. By selecting a System/BOX from the list you will be taken directly to that System/BOX. *You can also access your Home page from anywhere in the software by clicking on the "HOME" button.*

Navigation Panel – Beginning with the Company box on level 1, the Navigation Panel shows a direct line down the levels of the organization to the System/BOX you want to work on. The view consists of general business "Activities," the "System" or BOX you are currently working on, and the "Steps" within that system. Each is described further below.

Activities – The Activities section shows the hierarchy of BOXES as you drill down from the top of the organization to the System/BOX you have selected to work on. As you go deeper into the organization, a Roman numeral appears to the left indicating the level of each activity (see "Levels" below). The BOXES in the Activities area provide a frame of reference and enable you to move up or down the organization in a direct line.
System – The System section is the box you are currently working on (orange background). When you create

Appendix 2.2: Software Navigation

a flowchart or checklist, add components, or other work in the Task Window, this is the specific box that all of your work applies to. You can make any box the current System by double-clicking on it, or by right-clicking and choosing "Select as Current System."

Steps – The Steps are what you must do to operate the System named above. If the order is important, you can think of these steps as a procedure. If the order is not important, they are tasks on a checklist, either of which you will eventually develop in more detail. If you double-click on a Step, it will become the current System (orange background) and show its individual steps on the list below.

Levels – By default, the top BOX in any organization—Level I—is the "Company." This is the only BOX that cannot be deleted; Level II is the "Department" level, having names like Sales, Operations, Finance, or Administration. You will discover that most system development takes place on levels 3-5. However, you can go as deep as you want to perfect even the smallest details.

Plus (+) – When you see a plus sign on the left side of a box in the Navigation Panel, that means that there are lower-level Steps/BOXES within that box. If there is no plus sign, you have reached the last Step/BOX in the down-line. There are no deeper levels of activity described as of yet.

Right-Click Menus – By right-clicking your mouse, in the Navigation Panel and other sections of Box Theory™ software, a pop-up list will indicate the actions you can take, such as adding, renaming, deleting, or other appropriate functions.

Select as Current System – Double-click your mouse on any BOX to make it the current System. You can also right-click and choose to "Select as Current System."

Add, Rename, Delete a BOX –. Right-click on a System or Step to edit its "Name" or "Purpose/Description." You can also add or delete a Step. Caution: Deleting a BOX will delete everything associated with it such as flowcharts, component documents, etc.

Naming a BOX – The name of a System/BOX is a brief description of its role as the step of a process. You can put up to six lines of text in a flowchart box. The name should be descriptive enough to understand the system; however, it is best to use as few words as possible. You can add any amount of detail in the Purpose/Description of the System. A high level BOX could just be named "Hiring," while a lower-level more detailed BOX (sub-system) may be named "Interview the Job Candidate."

Purpose/Description – The Purpose/Description of a BOX is a statement that further describes the role or purpose of the BOX as a step in a process or task on a checklist. It is a way to provide more information beyond the name itself. Note: You may also want to describe in the Purpose/Description the steps or tasks in the next level down to avoid having to actually create and work on those BOXES individually.

Appendix 2.3: Software Navigation

<u>Moving a BOX</u> – To move a Step up or down the list, select the Step with the left mouse button and drag it to the desired position. This will enable you to re-order the steps in your procedure. You cannot drag a Step outside of the current System of steps. However, from within the System Framework on the Main Menu, you can right-click and move the BOX to another location in Box Theory™ Software using the Microsoft-style directory tree.

<u>Resulting Actions</u> – When you add a System/BOX in the Navigation Panel, the System Framework is also updated. In addition, the new BOX is placed on your Flowchart grid and added to the Checklist. In fact, when a System/BOX is added, modified or deleted anywhere in the software, all other areas are updated.

HOME PAGE

When you first load the software, the "HOME" page is displayed in the Task Window. The Home page displays information that you can customize for personal use. The following "gadgets" are displayed.

<u>Favorite Systems</u> – When you create a new System/BOX, you have a check-box option to display the system name on the Home page for easy access. Systems listed on the Home page may be your organization's core systems, the systems you are the owner of, or systems that you frequently work on. You decide. By clicking on the system name, its Dashboard page is displayed in the Task Window. By right-clicking on the system name, you can go directly to a work area of the system such as "Components," or "System Checklist."

Favorite Systems are automatically listed under tabs with department names you created. If the department name is long, you can right-click to edit it. For example, You could change "Administration" to "Admin," or "Marketing and Sales" to just "Marketing," just "Sales," or "M & S." Shorter tabs allow more space for the list below. <u>Note:</u> These name abbreviations do not alter actual department names found elsewhere in the software.

<u>Web Links</u> – Create links to your favorite websites that can help you with system development work such as vendors, customers and other business resources. You can also launch your email program from here.

<u>Recent Documents</u> – Go directly to the most-recent documents you have accessed in your Component Manager. (This list is refreshed each time you open the HOME page.) Click on the "T" button to go to the Template Manager, a repository for storing document variations, obsolete documents you don't want to discard, or frequently used document formats and templates.

<u>Calendar</u> – Check dates going infinitely forward or backward.

<u>Systems Thinking Tips</u> – Each time you go to the HOME page you will see a new thought, tip, or quote that may prompt you in your system development work. By clicking the "All" button, you can scroll up or down the list to see thoughts of the past or those coming in the future. Click again to return to the current tip.

Appendix 2.4: Software Navigation

<u>Performance Indicators</u> – When you create a new measurement report, you have a check-box option to identify it as a Key Performance Indicator (KPI). Measurement reports that track KPIs are listed here along with current data. You can open the report by clicking on the report name.

<u>Notes/Videos/eCourse</u> – In the left Navigation Panel, you can create any number of categories or subcategories of notes, to-do lists, and so forth. Right-click to add, rename, and delete. You can also drag the notes to change their order on the list. Keep in mind that there is a separate place for "System Notes" pertaining to an individual System/BOX. The "Video Tutorials" button provides single-point access to all help videos presented throughout the software. The eCourse button displays the entire book, "Box Theory™: Double Your Profit with High-Performance Systems and Processes."

OTHER NAVIGATION TOPICS

<u>The Taskbar and the Toolbar</u> (described on page 12)

<u>The Level-viewer</u> (described fully in the "Software Help" wherever the tool appears on a page).
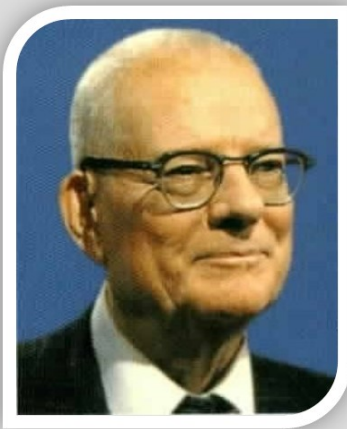
"94% of all failure is a result of the system… not people. A manager of people needs to understand that the performance of anyone is governed largely by the system that he works in, *the responsibility of management*."

W. Edwards Deming,
Total Quality Management

Appendix 3.1 Working With Files

COMPANY FILES

An activation key is required for each separate installation of the Box Theory™ software. The software database is one file with the extension .btg (Box Theory Gold). All your work to create an Organization Blueprint and Box Theory™ Systems is contained within this file. The .btg file is automatically backed up and can easily be restored from earlier versions (see "Backup and Restore" below).

When you first enter Box Theory™ software, you are asked to provide a company name. The name of your company is also the name of your .btg file and the name of the folder it is stored in on your hard drive. If you modify the name of your company, your .btg file and company folder will automatically be renamed. By default, your company folder is created in the "Documents" or "My Documents" folder of your computer, depending on your operating system.

Insides your company folder are several other folders. The "BTG Backup" folder contains your backup files. Other folders such as "Text," "Spreadsheet," and so forth, contain copies of the component documents you have created using Microsoft Office or Open Office (see "Component Document Files" below).

Whether you have Box Theory™ Gold, Multi-Company, or the Silver edition, the database file is the same. If you begin with Box Theory™ Silver, you can upgrade to Box Theory™ Gold and maintain all of your current data. To verify what edition you are using, go to the Main Menu and select "Help." You will either see "About Box Theory™ Gold" or "About Box Theory™ Silver" at the bottom of the menu.

The primary difference between the Gold and Multi-Company editions is that Gold only works with one company file while the Gold Multi-Company edition supports unlimited company files. In the Silver edition, the "People," "Quality" and "Speed" areas of the Taskbar are also disabled. The Silver edition is scaled down in this way for smaller or start-up companies.

COMPONENT DOCUMENT FILES

One of the unique features of Box Theory™ software is its ability to manage all your component documents. Currently, the software officially supports Microsoft Office and Open Office products such as Word, Excel, Publisher and PowerPoint; however, you can also import other document types, such as a .pdf file, and open them from within the software.

In order to organize your business documents—like they have never been organized before—we have created a file structure within the software database (.btg file) that tracks every document you create and the business system it is associated with. Your documents are created, stored, and retrieved from within the "Component Manager" of the Box Theory™ Systems area.

Your documents are also duplicated on your hard drive in the company folder--the same folder that contains your Box Theory™ company database, or .btg file.

Appendix 3.2 Working With Files

Document File Types – In the company folder of your hard drive, you will see folders such as Text, Spreadsheet, Graphic, Database, Pdf, Template, Other, and Temp. These folders contain copies of the documents you created in Box Theory™ Software. They are organized by file types instead of systems. For example, Microsoft Word files and Open Office Writer files are stored in the Text folder. Files of *any type* that are displayed in the Template Manager of the software are stored in the "Template" folder. These folders only appear as you create specific file types. For example, if you never use Microsoft Access, the "Database" folder will not be listed.

Important Note: If you discontinue using Box Theory™ software, you have easy access to all the files you created using this software program.

Synchronization – Box Theory™ software regularly synchronizes its database with the duplicate files on your hard drive. If you update a file in Word, for example, outside of Box Theory™ software, the synchronization will update the file within the software the next time you open it.

If you lose a file on the hard drive, Box Theory™ Software will copy it back during the synchronization. If you add a new file to your company folder, and Box Theory™ Software doesn't know what system it belongs to, it will put the file in the Template Manager, and you can later add it to a specific system.

You don't really have to worry about managing any of this; it all happens behind the scenes. Synchronization takes place when you open and close the software, and it checks at intervals while you are working. All you need to know is that you have an extra copy on your hard drive of every document you created in your company database.

Note: It is a good habit to access your Microsoft document files from within the software and to close any open Word or Excel documents, for example, before exiting the software. If you happen to exit the software and discover that you still have an open and unsaved document, just save it as usual. The synchronization process will update the file inside the software the next time you load it.

Keep in mind that if you create a document and save it somewhere on your hard drive other than in your company folder, it will not be known to Box Theory™ Software and not included in the synchronization process. Box Theory™ only knows what is in your company database (.btg) and the company folder on your hard drive.

Importing Documents – When importing document files from your hard drive into your Component Manager, you should avoid bringing large multi-media files. These file types often exceed computer memory and will abort, or if they do import, will bloat the database and slow performance. Simply put, your Box Theory™ company database can handle standard business document files—even large ones—without a problem, but don't bog it down with extra-large media files.

"Experts in every field agree on the transformative power of systems."
Mark Joiner, Simpleology

Appendix 3.3 Working With Files

Linking to External Documents – If you do have a large file that you want to associate with a system, you can right-click from within the Component Manager and create a link to the file on your hard drive, Google docs, or Dropbox. The document will load and run from within the Component Manager just like your other documents; however, it will not be saved inside your company database (.btg) or duplicated in the company folder. In the Component Manager, a linked file will display the name followed by "(link)."

Unique Document Names – Document files in Box Theory™ Software must have unique names, even if the same document is used in a different system. If you are attempting to name a file that is already in your company database, you will be prompted to give it a new name. It can be only slightly different.

COLLABORATION AND NETWORKING

The Box Theory™ database file can only be opened by one user at a time. However, it is currently recommended that one or two designated people become experts with the software.

Note: To prevent problems of overwriting data, the database is locked to others when one user has the software open. Simple scheduling will allow more than one person to work on the same database.

While it is encouraged for team members to "rough in" a system flowchart using a whiteboard, a person who is familiar with Box Theory™ Software will be the most efficient at developing and refining the final system documents.

If you have more than one person working in Box Theory™ Software, I recommend that the software be installed on a file server or in a peer-to-peer networking arrangement where both people have access to the same database file. For a second user installation within your company, you can request another activation key at no additional charge. With the proper setup, you could also access Box Theory™ software on your business file server from your home computer.

It is also possible with the second activation key to have two separate installations on different computers—each having its own company database. Some people have successfully installed to a thumb drive and moved the company database between computers. Be sure the thumb drive is present before the software is launched and not removed until the software is closed.

If someone other than the business owner does most of the work in Box Theory™ software, they can periodically email the owner an updated version of the .btg file. When going back and forth, be sure that the most updated .btg file is emailed and copied over the older one.

Upon completion of a single system, a person could also export and email a System/BOX (.box file) with all of its components (e.g. flowchart, checklist, documents, measurement reports) to another person for importing into their database. Finally, all or selected parts of the Organization Blueprint can be exported and imported between databases (.blu file).

These are various ways you can work with a single company .btg file, or keep two separate files synchronized.

Appendix 4: Help Resources

SOURCES FOR HELP

Box Theory™ is a new way of looking at your business, a new way of thinking. Even though the methodology is simple and tasks are easy to perform, we realize that it will be a new experience for you. For this reason, we provide a great deal of help. Below are the sources you can turn to for instruction and examples.

<u>Main Menu Help</u> – From the Main Menu, you can view all the help found in the Appendix of this document..

<u>Software Help Button</u> – At the bottom of the Task Window in each section of the software, there is thorough help for the specific tool or topic. These help areas deal primarily with software functionality—how Box Theory™ Software works.

<u>Video Help Button</u> – The video help provides brief on-screen examples of how to use a specific software tool. The "Video Help" button on the Taskbar or "Video Help" tab on the HOME page, will show the video through a web browser. The videos may be slightly different from the current version of the software..

<u>Principles Button</u> – In each section of the software, you have access to the underlying principles for building your organization and its systems. Most of the "Principles" pages are taken from the eCourse, "Box Theory™: Double Your Profit with High-Performance Systems and Processes." They include instruction and strategy pertaining to the specific software task you are working on. You can also view the entire eCourse from the Navigation Panel, "eCourse" button on the HOME page.

<u>Example Page Button</u> – You will perform the important business-building tasks of Box Theory™ software on the "**Action Plan**" page of the Taskbar located at the bottom of the Task Window. The "Examples" page shows a real-world example of the Action Plan. Examples come from a variety of industries and business types.

<u>Worksheet Button</u> – Worksheets are available in some sections to get you thinking and brainstorming about a specific task. In some cases, Worksheets provide a foundation for completing the Action Plan. In other cases, they are a tool for producing supplemental information. Worksheets are optional to completing the Action Plan

<u>Spell Checker</u> (File > Admin > Preferences) – A spell checker (English or Spanish) will help you polish your documents for distribution. When you see a red line under a word you've typed, the dictionary thinks it is misspelled. Right-click to see word options or to add the word to your personal dictionary. You can also turn it off.

<u>Box Theory™ Business Systems Academy</u> – We recommend that you learn about Box Theory™ principles and software together by following the training program available at the Box Theory™ Business Systems Academy.

<u>Software Tips</u> – Every few days for several months after purchasing to Box Theory™ software you will receive tips to enhance your experience. You can access all of these tips at [BoxTheory™ Software Tips](#).

Appendix 5: Business Improvement

Most entrepreneurs are not familiar with the powerful business improvement techniques and strategies used by larger companies. The Box Theory™ method transforms these often complex and expensive Business Process Management (BPM) principles into simple and intuitive solutions for busy owners and managers on a limited budget. When applied, these principles can make your company remarkable!

What is Business Process Management?

Business Process Management (BPM) includes methodologies used by many larger companies to achieve "continuous improvement" of their business activities. Box Theory™ software simplifies these powerful principles to increase customer loyalty, profitably and growth.

1. **Six Sigma:** Improve quality by removing mistakes, defects, errors and rework in business processes.

2. **Lean Thinking:** Eliminate operational activities and processes that do not add value or benefit to customers.

3. **Theory of Constraints:** Remove bottlenecks, weak-links, and other limits (constraints) to reaching full potential.

4. **The Box Theory Way™:** Break the business down to manageable "boxes" (individual systems or processes) and improve their results by applying the *basic principles* of Six Sigma, Lean Thinking, and TOC above. Especially designed for small and midsize companies.