



Key Business Systems

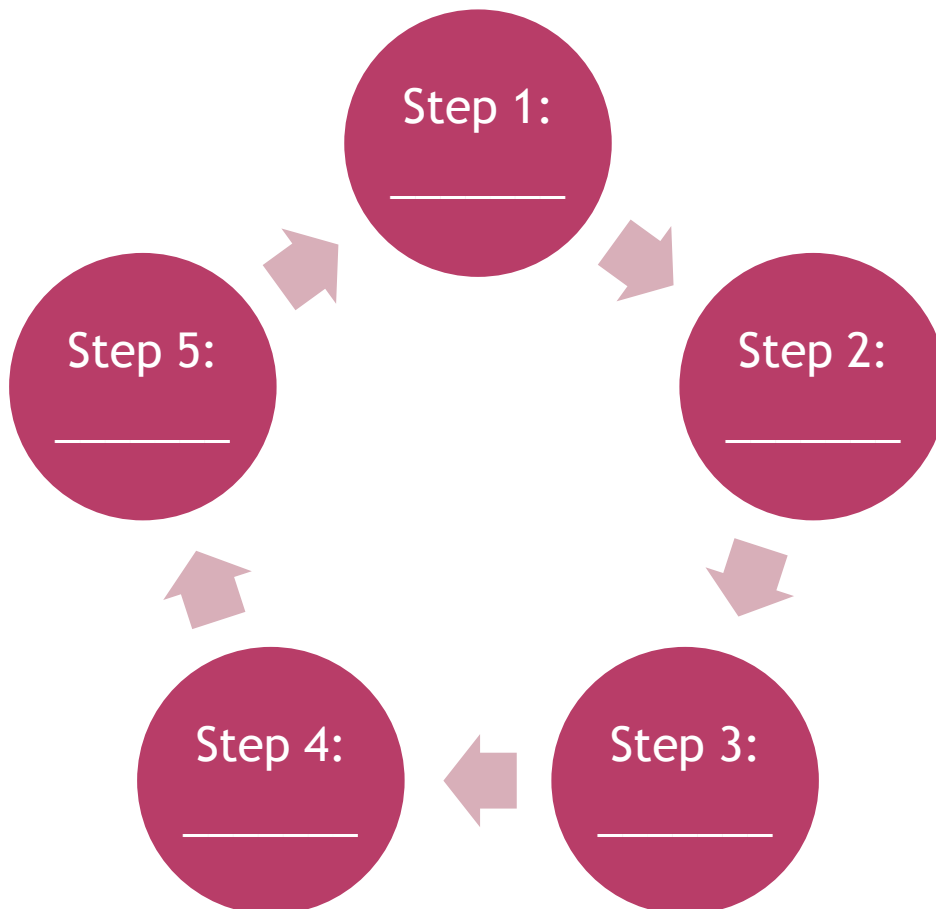
Keep your business running smoothly & stay productive

This template will help you go through the process of creating your **Key Business Systems**. Use it to review of the basic, must have key systems you need in place to keep your business moving smoothly and you productive and determining which additional systems you should have in place.

Task/Project Management System

Process

Here, list the steps inside of your task or project management system. For instance, who generates or determines the tasks and what happens to them after that? If this is a bit of a challenge for you, you might want to try an online tool such as Base Camp, Zoho or another project management tool. This will help you identify the steps for this system.





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Tools

Now, list the tools that you need for your task management system. For instance, which tool are you going to use to help you manage all of your tasks? What other tools do you need in place to support the above process at each of the steps involved?



Tools

- _____
- _____



Tools

- _____
- _____



Tools

- _____
- _____

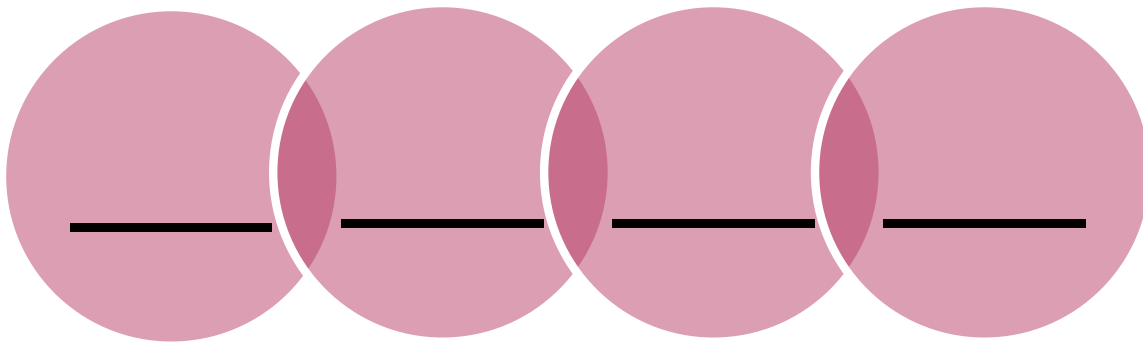


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People

You have your process and the tools for this system, now you have to determine who is going to be responsible for performing the tasks that the tools you've identified can't handle. This one is easy since it would include all of the members of your team. So that means you, your virtual assistant, interns, and anyone else who plays a role in your company.





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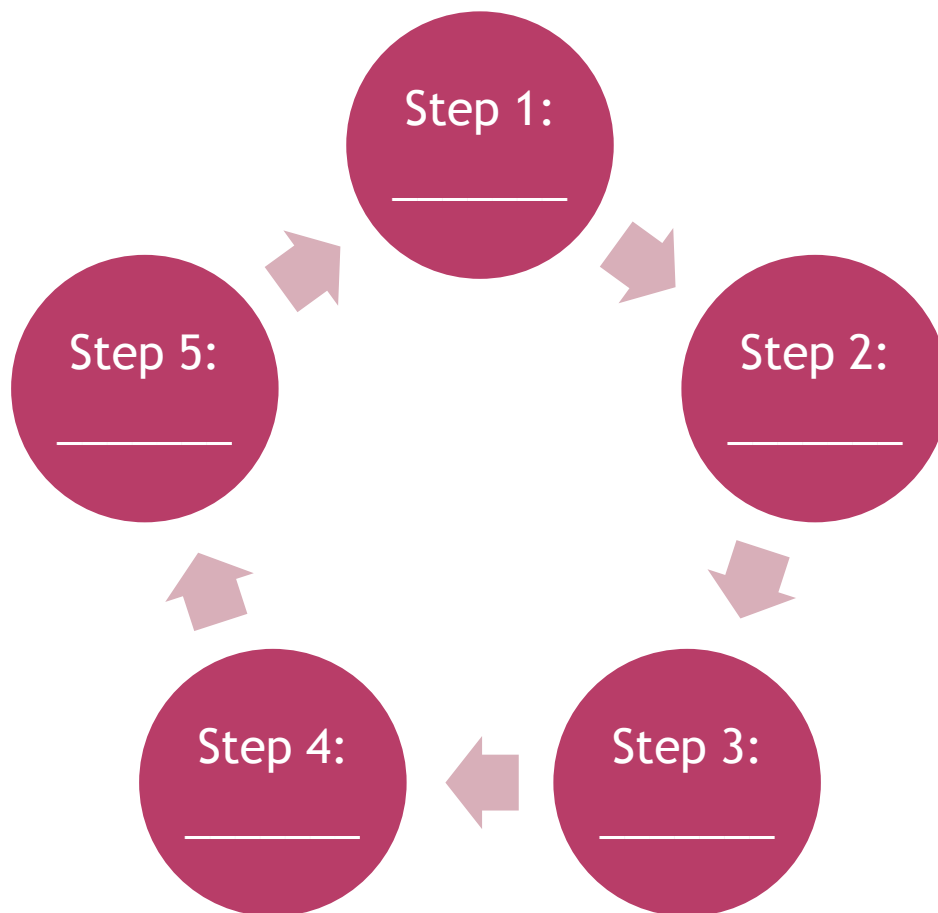
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Filing System

Your filing system should consist of three types of files: action, reference, and archive. Action files are files that you work with or need on a regular basis. Reference files contain materials that you refer to when needed and archive files are files that you don't use but need to maintain for tax or other reasons or purposes.

Process

How is your system going to be set up and which files will you place under each of the categories mentioned? What is the process for filing and how often is it going to be done?





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Tools

What tools do you need in place to support you with this system and its processes? You may already have some on hand. List them below.



Tools

- _____
- _____



Tools

- _____
- _____



Tools

- _____
- _____

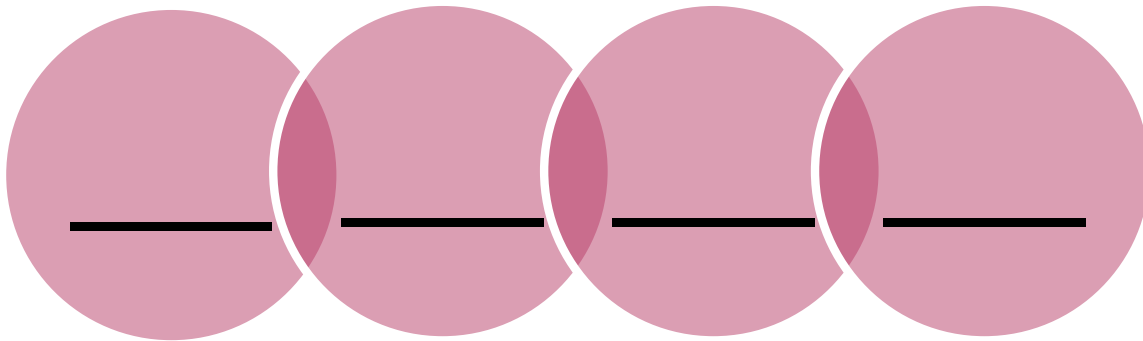


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You have your process and the tools for your filing system, now you have to determine who is going to be responsible for performing the tasks that the tools you've identified can't handle. If you have a team who has access to which files?





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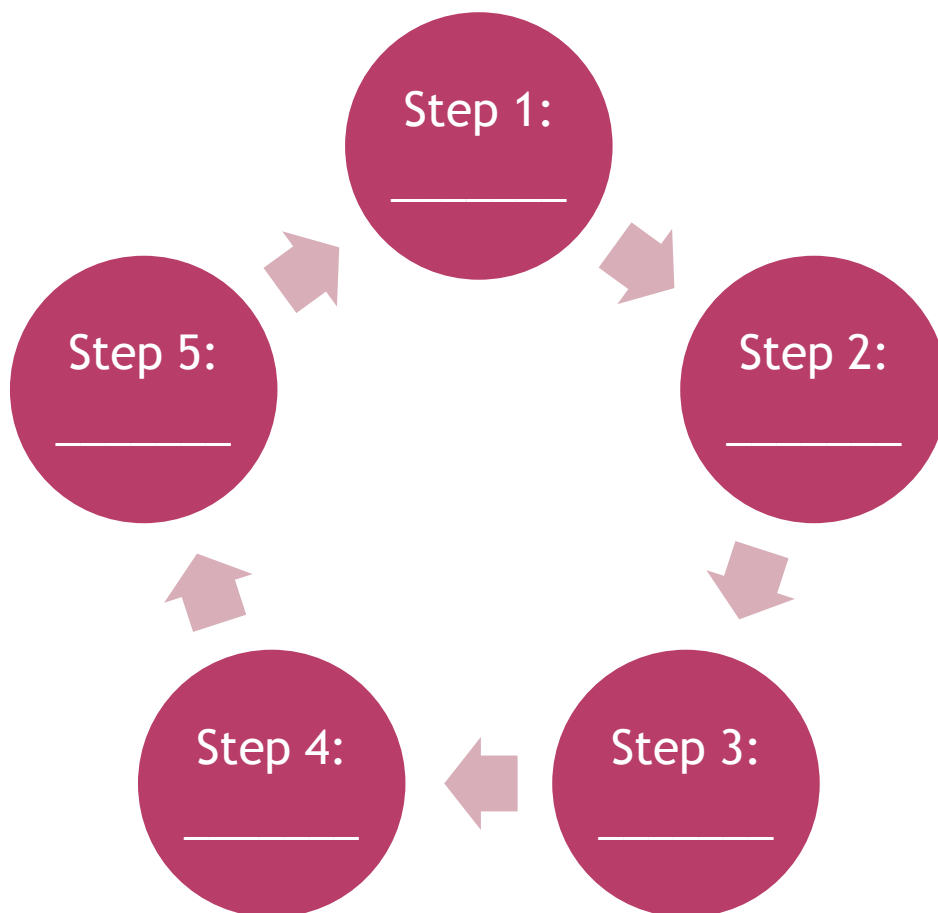
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Contact Management System

This is the system that you need in place to store and manage client, prospect, vendor and colleague information.

Process

What happens when you get someone's business card or take down their information over the phone? What you do with it determines whether or not you're able to locate the information later and if it stays up to date. Define your process for your contact management system.





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Tools

What tools are part of your contact management system? You may have just one, such as Act!, Outlook or Microsoft Exchange for collaborative communication. This way, everyone on your team has access to the same information at any given time.



Tools

- _____
- _____



Tools

- _____
- _____



Tools

- _____
- _____



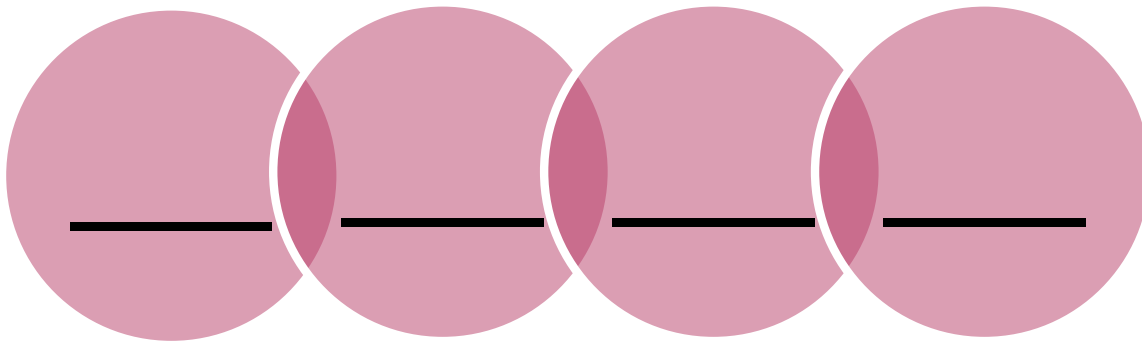


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People

Who is going to perform the steps in this process that your tools aren't able to perform? It might be that you want every team member to be responsible for entering and updating information, or maybe just one person to handle it.





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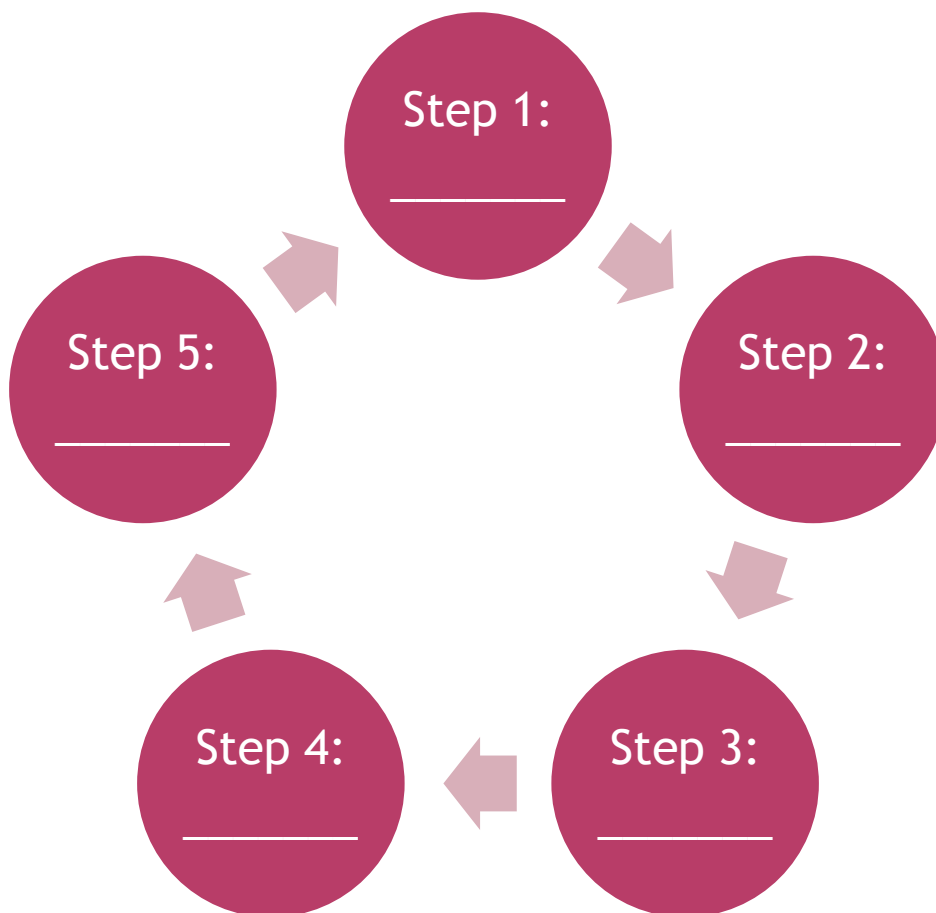
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Accounting System

You absolutely **must** have a way to manage and track your income so that you are aware of what's going on with your company financially. Don't lose income like the client I mentioned in the audio.

Process

What are the steps of your accounting system? Keep in mind that you want to invoice clients in a timely manner.





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Tools

List the tools that you'll use for this system. If you don't already have accounting software in place that's a must when it comes to the tools for this system.



Tools

- _____
- _____



Tools

- _____
- _____



Tools

- _____
- _____



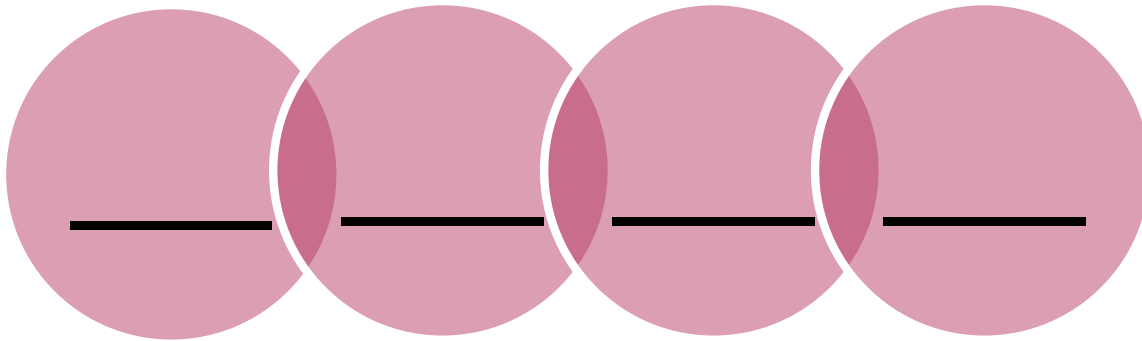


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Who is responsible for the tasks that the tools can't handle? Keep in mind that with your accounting system you don't want to have the same person who is creating invoices and making payments unless you're the only person on board. If that's the case, consider having an accountant as part of your team to do periodic reviews. If you choose to do that, make those reviews part of this system.





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Additional Systems

Now that you have the very basic foundation systems listed, what else do you see that you are going to need in place? Make your list based upon the nature of your business and the normal practices that you do on a regular basis. One system that every business needs is a marketing system and if you happen to have employees you'll need a payroll system. Even if you outsource this particular system, you will still have things that will need to be done in house. Look at what's not working for you. What systems can be put in place to support your productivity?











Once you determine the additional systems that you need in place, identify the process, tools and people for each of them. You can use copies of the blank templates below for your additional systems.

Now that you have a full list of systems, make time in your calendar to create and then implement each one. If you find that you need help with implementation, hire someone to help you to make the process smooth. I provide systems design and implementation services if you are interested. Email me if you would like more information info@thirdeyegroup.net.



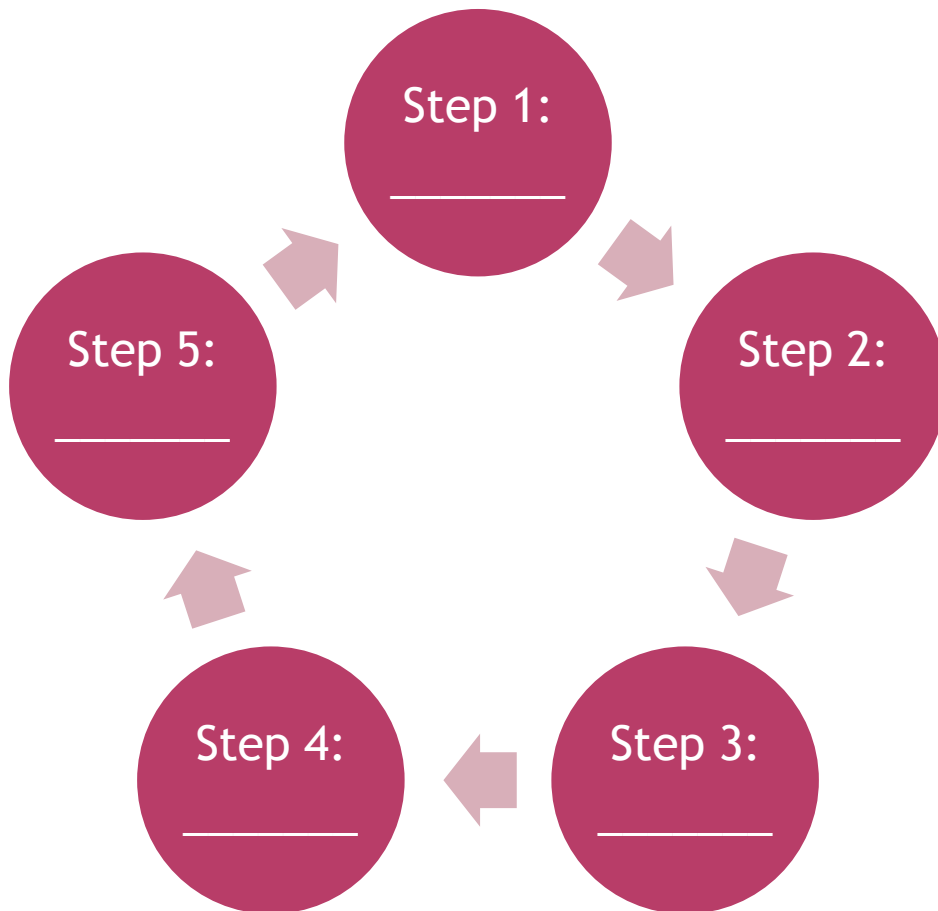


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Process

System: _____ What are the steps in this system?





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Tools

What tools will be used to support this system?



Tools

- _____
- _____



Tools

- _____
- _____



Tools

- _____
- _____



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People

Who is responsible for the tasks that the tools for this system can't handle?

