



Key Business Systems Checklist

Keep your business running smoothly & stay productive

Why Systems are Important

We're all doing so many things and life is moving at the speed of light. People already waste so much time. Did you know that on average an individual wastes 1.5 hours every day just looking for things? That most people spend about 12.5- 15 hours each week just managing email and only 5% of professionals implement a to-do list on a daily basis. The deck is really stacked against you when it comes to being able to fit things into the course of a day, so you really need all the help that you can get. Systems play a big role in optimizing productivity and they give you freedom and allow you to take a step back without things falling apart. With systems in place your business can still serve your clients. Systems are part of business; a key component when it comes to running a successful business.

What Happens When You Don't Have Systems in Place

When you don't have systems in place things start to fall apart. You may find yourself at a point where things aren't working, you're working hard, but not getting anywhere, or it may be that things are good. You're making the money that you want to make, have the clients that you want, but you're still working hard and your business is taking everything out of you and getting in the way of you having a life. I equate systems in a business to the systems in the human body. Each system has a separate purpose and processes within it that contribute to overall operation of the body. When one fails or isn't operating properly, then there are issues—some small and at times not so small. The same is so with your business. First it starts with smaller things like having to reinvent the wheel, spending time looking for things, then it escalates to not being able to find something having a big impact on a particular project or client or having to reinvent the wheel taking a large chunk of your time. Without implementing systems the madness just continues and gets out of





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hand and their absence makes it hard to take that step back from it and when you need to without impacting your clients. Without systems, your business cannot run efficiently.

This checklist will give you what I feel are the “must have” systems for any business and other systems that you will want to consider creating and implementing to help you keep your business running smoothly and stay productive.

Must Have Systems

Task/Project Management

Your task or project management system helps you determine the tasks that need to be done on a regular basis and also keep track of who each task is assigned to, its status and gives you a have a place to manage what you and anyone working with you is doing. All of your to-do items are in one place. All you have to do is build the muscle/habit of using it daily and to maintain it.

Filing

You have to have a way to manage the #1 culprit, paper. Without a way to contain and manage it you end up wasting time looking for things like I’ve seen so many people do time and time again. It’s important to set up files to house your reference, action and archive files and maintain it on a regular basis.

Accounting

You absolutely **must** have a way to manage and track your income. You’re in business to make money and it doesn’t serve you if you have no clue as to what’s going on with your money. Your accounting system should allow you to track income, what’s





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outstanding, expenses, what's due to vendors and creditors and to be able to know where you are financially at any point in time quickly.

Contact Management/CRM

This system gives you a way to contain and manage client, prospect, and vendor information. I wish I could count the number of times that someone has asked me repeatedly for people's contact information. What it boils down to is they can't find it because they don't have a system in place for it. Determine what tool you want to use and put it to use and get rid of the stacks of business cards and scattered information.

Other Systems to Consider

Marketing

Needless to say, a marketing system keeps you on track with connecting with potential and existing clientele. Your basic marketing plan, social media, article marketing, print ads, whatever you use to generate leads are all a part of this system.

Sales

You need a way to track sales, sales statistics, and traffic to your sales pages if you have any online and of course the calls that you make to generate and keep business flowing.

Scheduling

Whether you're a solopreneurs with no team members, have a small team or a larger one, having a way to keep everyone's appointments is key. There has to be a place for everyone to maintain their calendar with all appointments and meetings. You also





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have to keep up with your editorial, marketing and promo, events, and social media dates. A system will help to have everything in one calendar to avoid any overlap.

Communications

Communication has to take place or business isn't happening. Consider your needs when it comes to internal and external communication. This includes email, phone systems and any other tools to support communication

Back up

This is a system that most people miss or don't think about until it's too late. Having a backup system will save you a lot of headache, heartache and time. Be sure to put something in place to back up your computers, websites, blog, important paper files and other key items.





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Additional Systems

Now that you have reviewed this systems checklist, look to see if there is anything else you need to have in place. There might be something that is particular to your industry or type of business, like an inventory system for example.

- ☒ _____
- ☒ _____
- ☒ _____
- ☒ _____
- ☒ _____

Once you determine the additional systems that you need in place, identify the process, tools and people for all of the systems that you have to get in place. 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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