

MODULE 14 WORKSHEET

BUSINESS SYSTEMS

Systems and Procedures Checklist

Each business is different, but you should have most of these systems, procedures, and documents in place for a design business.

- ☐ Financial Documents: Cash flow statement, budget, overhead sheet, expense reports, income statements.
- ☐ Procedure for meeting on financials with bookkeeper/accountant.
- ☐ Expediting system.
- ☐ Ordering/pricing system.
- ☐ Procedure for billing/invoicing.
- ☐ Procedure for paying incoming invoices and bills.
- ☐ Contracts for EVERY service you offer for client (you should have a separate contract for full-service clients and done-in-a-day clients, for example).
- ☐ Contracts for freelancers/outourcing companies.
- ☐ Customer service policy.
- ☐ Employee handbook, which should include:
 - Attendance policy
 - Dress code
 - Social media guidelines
 - Disability/insurance policy
 - Drug/ethics/harassment policies
 - Confidentiality agreement
 - Benefits/salary/review process
 - Medical leave/sick days
 - Holidays/vacation policy/inclement weather policy
- ☐ Job descriptions, for you and for every employee.
- ☐ General office guidelines – cleaning, organizing, handling mail, ordering office supplies, etc.
- ☐ Standards list – for your office, for your work, for employees, and for subcontractors and other outsourced companies.
- ☐ System for tracking hours for you and employees.
- ☐ Business development strategy and procedures.
- ☐ Marketing strategy (includes social media strategy).
- ☐ Public relations strategy (this should include who in your office can, and cannot, speak to the press).
- ☐ Processes and procedures for your design business (refer to Module 12).