

MODULE 14 WORKSHEET

BUSINESS SYSTEMS

5 Steps for Creating Systems

1. Make a list of what systems you already have in place, and what areas of your business really need systems:

2. What CORE office systems do you need:

3. Are there repetitive tasks that you can systemize to save time?

4. Start to create a company calendar with all appointments and activities. Be sure to block out time for your important tasks, like design time, preparing for presentations, etc.

5. Start to create (or refine if you already have them) those critical long-term plans/documents, like budgets, client pipelines, marketing plan, etc.