

Systems & Smart Tools: Set Up to Scale from Day One

Quick Systems Worksheet



Your Business Basics

What do you do repeatedly:

What feels messy or disorganised:



Communication System

How do people book time with you:

How could you simplify this:

Quick win to implement this week:



Marketing System

How are you currently creating content:

Do you plan or post when you remember:

What could you batch or schedule:



Marginal Gains (Your 1% Improvements)

List 3 small improvements you could make:

1

2

3

If each saved you 10-30 minutes, what would that give you back?



Your Core Systems

Tick what you already have in place:

- Communication (email / booking system)
- Money (invoicing / tracking payments)
- Marketing (content / social media)
- Customer tracking (CRM / spreadsheet)
- Task management (to-do list / system)



Money System

How are you currently invoicing and tracking payments:

What would make this easier or more automated:

Where are you losing time or money:



Simple Automations

- Booking link for meetings
- Invoice reminders
- Email templates
- Social media scheduling
- Simple CRM (even Excel/Notion)