

ONLINE BUSINESS SYSTEMIZATION

CHECKLIST



Benefits of Systemizing your Business

- ☐ Create stable functioning procedures
 - ☐ know what needs to be done
 - ☐ have a way to do it
 - ☐ done right way, every time
- ☐ Complete tasks quickly
- ☐ Free up your time
- ☐ Reduce costs
 - ☐ Allows you to delegate
 - ☐ Focus on growth tasks
 - ☐ Increase revenue
- ☐ Increase efficiency
 - ☐ Discover unnecessary steps
 - ☐ Improve the process
 - ☐ Reduce mistakes
- ☐ Improve performance
- ☐ Improve communication
 - ☐ Eliminate miscommunications
- ☐ Scale your business
 - ☐ Hire the right people
 - ☐ Gain more sales
 - ☐ Have fewer errors
 - ☐ Cut costs
- ☐ Measure progress
 - ☐ Measure marketing efforts
 - ☐ Measure development process
 - ☐ Obtain real-time data
- ☐ Meet deadlines
 - ☐ Eliminate bottlenecks in operations
 - ☐ Keep things running smoothly
- ☐ Free up more time
 - ☐ Focus on essential tasks
- ☐ Take Time Off
 - ☐ Company can function without you

List Your Most Recurring Tasks

- ☐ Identify Recurring Tasks
 - ☐ Accounting
 - ☐ Administration
 - ☐ Marketing
 - ☐ Sales
 - ☐ Technology and Data
 - ☐ Human Resources
 - ☐ Communication
 - ☐ Customer Relations
 - ☐ Purchasing
- ☐ Organizing and Prioritizing
 - ☐ Product development
 - ☐ Tech Support
 - ☐ Sales, marketing, customer support
- ☐ Developing policies and procedures
 - ☐ Creating a logical process
 - ☐ Must be relevant
- ☐ Documenting the process
 - ☐ Eliminates miscommunication
 - ☐ Eliminates confusion
 - ☐ Draw on employee experience
 - ☐ Utilize templates and samples
 - ☐ Hire business consultant to help
- ☐ Implement the Processes
 - ☐ Determine if the basic structure is sound
 - ☐ Expect bumps in the process
- ☐ Diagram Business Flow
 - ☐ Ensures a logical ebb and flow
 - ☐ How things flow through each department
 - ☐ Identify who is responsible for each task
 - ☐ Evaluate time to complete task
 - ☐ Make clear procedures work correctly
 - ☐ Spot areas for improvement

Tools for Systemizing

- ☐ Asana
- ☐ Ontraport
- ☐ Slack
- ☐ Deadline Funnel
- ☐ Lead Pages
- ☐ Calendly
- ☐ GoToWebinar
- ☐ DropBox
- ☐ Google Docs
- ☐ Google Calendar
- ☐ Webinar Jam
- ☐ Screencast-o-Matic
- ☐ HootSuite
- ☐ Infusionsoft
- ☐ MailChimp
- ☐ Needls
- ☐ Salesforce
- ☐ IFTTT

Create Standard Operating Procedures (SOPs)

- ☐ Make things run smoother
- ☐ Make tasks effortless
- ☐ Prevent costly mistakes
- ☐ Simply and formalize
- ☐ Create an initial draft of each process
 - ☐ Include title of SOP
 - ☐ Include reason for SOP
 - ☐ Specific action steps
- ☐ Develop naming conventions
 - ☐ Make documents easy to find

- ☐ Client name
- ☐ Project name
- ☐ Abbreviated title
- ☐ Version number
- ☐ Document number
- ☐ Writing the procedures
 - ☐ Write in present tense
 - ☐ Be concise
 - ☐ Get to the point
 - ☐ Create a logical order
 - ☐ Highlight exceptions
 - ☐ Highlight warnings
 - ☐ Number each step
- ☐ Keep in sequential order
- ☐ Maintain same style
- ☐ Creating action steps
 - ☐ Include summary sentence
- ☐ Explains what will be achieved
- ☐ Orients reader
- ☐ Keep short and concise
 - ☐ Identify main tasks
- ☐ Include in procedure heading
- ☐ Defines starting point for procedure
 - ☐ Write out the detailed steps
- ☐ Keep in sequential order
 - ☐ Include sub-steps
 - ☐ Identify secondary tasks
 - ☐ Include warnings and notes
 - ☐ Include related information
- ☐ Implementing new SOPs
 - ☐ Test and measure
 - ☐ Seek feedback
 - ☐ Improve when needed
- ☐ Get employee buy-in

Outsourcing Like a Pro

- ☐ Works best with established framework
- ☐ Need documented processes in place
- ☐ Hire different people who can handle small aspects
 - ☐ You get the right person for the job
 - ☐ Save money
 - ☐ Eliminate single points of failure
- ☐ Identify outsourcing task
 - ☐ Know the skills needed to complete task
 - ☐ Know the outcome you're expecting
 - ☐ Know the level of expertise required
- ☐ Write Project Description
 - ☐ Include specific project title
 - ☐ List required skills
 - ☐ Quickly eliminate candidates by being clear about expectations and needs
 - ☐ Provide specific parameters
- ☐ Specific technical skills required
- ☐ Programming languages requires
- ☐ Exact word counts for project
- ☐ Niche market for project
- ☐ Description of target audience
- ☐ Example products and websites
- ☐ Eliminate unqualified bids
- ☐ Pick 3 to 5 qualified candidates
- ☐ Pick most qualified freelancer
 - ☐ Run small project
 - ☐ Look for interest in described project
 - ☐ Check references

Using Automation Tools

- ☐ Zapier
- ☐ Flow
- ☐ Pipedrive
- ☐ TextExpander
- ☐ Alfred
- ☐ IFTTT
- ☐ Shortcat
- ☐ Robotask
- ☐ Tallyfy
- ☐ Intercom
- ☐ Delivra
- ☐ Autopilot
- ☐ mHelpDesk

Scaling Your Business

- ☐ Create the right strategic plan
 - ☐ Reevaluate every 90 days
- ☐ Measure effectiveness with accounting
 - ☐ Reveals strengths and weaknesses
 - ☐ Understand where you're at
 - ☐ Understand where you're going
 - ☐ Understand how to get there
- ☐ Focus on Sales and Marketing
 - ☐ Build a baseline lead-generation system
 - ☐ Implement marketing controls
- ☐ Hire the Right People