

BUSINESS SYSTEMS

self audit

LEVEL 1 -YOU ARE JUGGLING ALL BUSINESS DUTIES

YES	NO	
		Do you have a Business Plan? (It counts if you have in your mind)
		A set Budget?
		A Marketing Plan (or outline) on how to get clients in the door?
		Have you defined your Ideal Client?
		Email triaging Systems?
		Do you have a System for managing your time?
		Do you have hiring plan based on a GAP Analysis?
		Do you know and understand your Financial Reports?
		Do you have a Short Term Cash Flow Plan?
		Do you have Filing, Naming and Organization Systems?

LEVEL 2 -YOU ARE BUILDING YOUR TEAM (2-4 PEOPLE)

YES	NO	
		Do you have a Marketing Assistant?
		Social Media procedures?
		Public Relations procedures?
		Video and Audio-Visual procedures?
		Online Presence procedures?
		Written Content procedures?
		Content and graphic design creation procedures?
		A VIP Referral Program System
		Raving Fan Card Systems
		Gift Giving Policies & Procedures
		A System for Handling Client Complaints?
		A Quarterly Meetings System?
		Team Communication Systems?
		Do you have a Vacation/PTO Policies and Procedures?

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LEVEL 3 - GROWING YOUR TEAM (5-9 PEOPLE)

YES	NO	
		Do you have a Billing Clerk?
		Do you have an A/R and A/P System?
		Do you have a process for Tracking your Business Expenses?
		Do you have a Sales Team?
		Are you familiar with what a Pre-Conditioning Campaign is?
		Do you have templates or scripts to tackle the Objections during your Sales Conversations?
		Have you set out a "Follow Up" procedure?
		Have you mapped out your Customer Journey?
		Do you have a "Brand Guide" document?
		Do you have a process for attending Networking Events and Speaking Events?
		Have you set out KPIs to track your Marketing Team's performance?
		Are you familiar with the 10 Documents for a successful hiring process?
		Do you have an onboarding plan and process?

LEVEL 4 - DEVELOPING YOUR TEAM (10+)

YES	NO	
		Do you have a Sales Director?
		Do you have a Marketing Coordinator?
		Do you have an Executive Team Meeting each week?
		Do you have an HR Director?
		Do you have a Systems Master to handle the evolving systems?
		Do you have all 6 of your Key Systems Manuals built out and being used by your team?
		Do you have a DEI Statement & a DEI Development Plan?
		Do you track your NPS Score on a monthly basis?
		Do you have an advanced "Brand Guide" document?
		Do you have a process for vetting vendors and external consultants that can be used by others on the team?
		Do you have all of your Workflows and Workloads developed?
		Do you have a strategic plan and a tactical plan for the next 18-24 months?
		Do you have a trusted coach who gets systems?