My Top 10 Business Systems Checklist

You will want to consider your systems in each of the following areas.

Note – if you don't have the time or expertise to create these systems yourself you can certainly get someone to help. Just make sure that the person you hire to help knows what they are doing. If you are interested I do offer Systems Consulting on a 1-1 basis with limited availability – email tina@tinaforsyth.com for details.

1. Backup systems
2. Money Systems
3. Scheduling Systems
4. Communication systems
5. Metrics Systems
6. Marketing Systems
7. Relationship Systems
8. Sales Systems
9. Delivery systems
10. Business Foundation Systems

Backup Systems

This is #1 for a reason – your files are your biz!

- ☐ Automated backup for all files on your computer
    - – I use and highly recommend www.dropbox.com
- ☐ Centralize ALL team files
    - – Have people load them up to your virtual office

- ☐ Websites & databases
  - – Have someone do a backup once a month (VA)
- ☐ Backup for when people are away – vacations, illness
  - – Your SOP Guide will allow backup of tasks & responsibilities

Money Systems

If you aren't consciously taking care of your money your business will struggle

- ☐ How is money coming into your business? (Automate)
  - – Payment systems, shopping carts, merchant accounts, etc.
- ☐ Tracking payments (WEEKLY)
  - – NEED a system to track declines, collections (VA)
  - – Spreadsheet to track payments on higher end programs
- ☐ Cashflow & Expenses – the flow of money in and money out
- ☐ Bookkeeping & Accountant – a must!

Scheduling Systems

Keeping track of what is happening and when (big leak for many!)

- ☐ Booking Appointments (Automate)
  - – Timetrade.com connected to your Google or Outlook calendar
- ☐ Promotional calendar
  - – What are you launching/promoting & when? Plan the year in advance
- ☐ Publishing calendar – For ezines, solo mailings, etc
  - – How often do you mail your list
- ☐ Central Events calendar
  - – Classes, trainings, travel, etc

Centralize your calendars in CD or Google Calendars

Communication Systems

How do people communicate within and outside the company?

- ☐ Email
  - – Public email addresses vs. private, who answers what
- ☐ Phone
  - – Get a toll-free number as your public ph#
- ☐ Instant Message
  - – Recommend not using unless necessary – distracting!
- ☐ Social Media
  - – Check blog comments, direct messages, etc

See copy of Escape from Email Hell in the resources

Customer Service

Taking care of questions before / after the sale

- ☐ Where do CS requests go? (email addy or online system i.e.: Zendesk)
- ☐ How quickly to respond to requests – set a standard (24 hr minimum is ideal)
- ☐ Template for replies (greeting, upsell, email sig)
- ☐ Create list of canned responses for common questions

Metrics Systems

Metrics let you know what is going on in the business – so key! (WEEKLY)

- ☐ People numbers – prospects (list) & customers
- ☐ Sales – products & services
- ☐ Promotional stats - conversions
- ☐ Website traffic
- ☐ What your goals and targets are.
- ☐ The change in all of the above.

Marketing Systems

Lead Generation - the heart of marketing systems is 'how do people find the business, get exposed to what the business offers?'

Will vary greatly from client to client and could include:

- ☐ Online Traffic & SEO
- ☐ Social Media & Blogging
- ☐ Affiliate (Joint Venture) Marketing
- ☐ Article Marketing
- ☐ Advertising
- ☐ Publicity & PR
- ☐ Speaking (Live or virtual)

Relationship Systems

How does the business build relationships with people once they have joined the list?

- ☐ Sending out a regular Ezine or newsletter
  - – Map out your ezine template & sending process
  - – Setup your broadcast calendar (commit!)
- ☐ Autoresponders / Upsell
  - – Setup automated marketing sequences for those who join the list ← huge gap here for many biz owners, lots of opportunity when done right.
- ☐ Social Media / Blogging
  - – Build your social media plan for consistency

Sales Systems

Where the prospect becomes a client

- How do people become clients?
    - Online via sales pages
    - Live in-person conversations (sales calls)
    - MUST have a strategic process in place here
- Follow-up Process
    - How you will follow-up with interested parties (automate as much as possible) ← another area that is a big gap for many, lots of opp if you do this right

Delivery Systems

How do you deliver your products and/or services?

- Welcome Process
    - Once you make a sale, what happens then? (automate – immediate access)
- Tangible products i.e.: books, multimedia kits
    - Automated fulfillment (print & ship) – Vervante.com
- Membership Programs
    - Member area technology – WishList Member
- Coaching Programs
    - Various elements, depending on structure
- 1-1 Services
    - Engagement process, how to get started?
    - If you want to replicate yourself – hire people to do what you do – then you NEED have develop clear step-by-step systems for them to do the work.

Business Foundation Systems

If you take your business seriously then you need to consider your foundation.

- Legal
  - Business entity, protecting assets, agreements
- Insurance
  - Different types of insurance, what do you need?
- Financial
  - Managing cashflow, bookkeeping, financial advisory
- Tax
  - Setting yourself up to pay the least necessary!

Highly recommend Alexis Martin Neely's LIFT Foundation System
www.tinarecommends.com/lift