



# Key Business Systems & Tools Review:

Our businesses run on systems, if we are aware of them or not. Some systems were created by accident – that’s just the way you started doing it and continue to do so. **Successful businesses set up intentionally documented systems.**

**For each business area below, ask yourself these questions:**

- Where are you now?
- Where do you want to be?
- How will you get there?
- Who is responsible?
- What are the financial implications?
- How will you review/track?

## Business Foundation Support Systems:

*Do you have an expert to rely on for advice?*

- Attorney/Legal Support: Contracts, Employee, TM
- Insurance - Business, Life, Health
- Financial Support (Bookkeeper)
- Tax support (CPA)

## Back up/ Documentation Systems:

*Do you have a backup plan in place?*

- Databases/Email
- Computer Files
- Website
- Social Media Profiles
- People - (SOP's): what happens if someone leaves/out sick/dies?

## Money Systems:

*How does money move through your business?*

- Payment processing: How can people pay you?
- Processing and Tracking Invoices/Payments/ Declines/Past Due?
- Cash flow: what is coming in and out of the business?
- Accountant Reports: P&L, Cash Flow, Balance Sheet
- Taxes: separate account?

## Scheduling Systems:

*Are you managing your calendar?*

- Appointments: time/type/automated
- Promotional Calendar: Do you know what/when you are promoting something?
- Publishing Calendar: Newsletter/social media

## Communication Systems:

*How are you communicating with prospects, partners and clients?*

- Email: templates/out of office
- Phone: voicemail/text
- Social Media: schedule of posts - time to reply/interact; automated responses
- Website Inquiry: automated templates

## Customer Service Systems:

*How do you deal with problems?*

- Where do request go?
- Who is responsible for answering?
- Timeline for response
- Templates for FAQ

## Sales Metric Systems:

*Are you tracking these numbers?*

- Prospects:
- Sales - products/services sold:
- Broadcasts - Email: opens/clicks/purchases
- Social Media: Opens/click through/ad spend

## Marketing Systems:

*What are you currently doing? What's working and what's not?*

- Online traffic and SEO:
- Social Media/Blogs:
- Email:
- Video:
- Affiliate Marketing (JV)
- Advertising:
- Speaking:

## Relationship Systems:

*How do you nurture people on your lists? Build "Know, Like and Trust"*

- Email nurture
- Newsletter - electronic
- Follow-up strategies: Mail, drop by, gift, invites, partners, connections
- Social media

## Sales Systems:

*How does a prospect move through your sales system?*

- Online/Email: scripts/templates/landing pages
- In person/phone calls: scripts
- Follow-up/follow-through from prospect to client? Automate
- Contracts/Agreements:
- Payment:
- Outline of process:

## Onboard/Delivery Systems:

*How do you enter a new client and then deliver their services/product?*

- Onboard new client: data entry, contract, introduction
- Ongoing work/delivery: Are all operations documented from start to finish?
- Check-In/follow-up: do you know when you are on task?
- Project/product delivery: method, receipt,

## Personal Development Systems:

*Do you have a system for self-improvement?*

- Reading/Listen: Blogs, books, podcasts
- Coaching: Seminars, 1:1, groups

*"Mary with Success Magnified is an incredible business coach. She is amazing at helping break down everything that is overwhelming and make it all manageable. Mary always has tools and resources to give you and will help you feel like you are in control again."*

*- Julia B.*

# Mary Gaul

SPEAKER • AUTHOR • COACH

## About Mary:

- Certified business coach and thought partner.
- My clients are service-based women solopreneurs and I guide them to create profitable and fulfilling business, built around systems and accountability, so they can have time to enjoy life too!
- I believe in the power of collaboration and celebration to help business owners impact their bottom line, their families, and their communities.
- Over the past 7 years in business, I have helped 100's of solopreneurs take control of their ideas and time, to create and implement smart growth strategies - one of them went from idea to over \$200K in revenue in just under 2 years.



## Contact Me:

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## Entrepreneurs!

Want to know exactly what to focus on to grow your business?

- Book a 30 minute FOCUS call with me at:  
<https://calendly.com/successmagnified/30minfocus>

*"I bring the calm and clarity of a trusted leader to encourage action and achieve results while having fun."*