Week 34 Focus – Systems in The Business

Focus Question: What's working and what's not as it relates to your systems?

🧩 STORY

Systems help us to replicate things on a consistent basis. They also help us to:

- Scale business
- Be more efficient rather than having to reinvent the wheel multiple times
- Organize – so things take less time

Think about your work, whether you are an entrepreneur, leader or team member. My guess is that you already have a variety of systems in place to help you do things, and that there's room for growth. Throughout the Coaching Business Builder and PlanDoTrack I cover a variety of systems.

> "Spend time upfront to invest in systems and processes to make long-term growth sustainable."
> -Jeff Platt

Consider these systems for your business:

System	Questions to Consider	Sections to Explore
Sales and Marketing	What are you doing to promote your business? What are you doing to close the sale? As you are having conversations, what do you notice about what people are attracted to with your products or services?	Pages 70 and 71
Program Development	What programs are you going to be developing in the new year? What are the different offerings you have at different areas of the funnel? (see project management)	Refer to Program Development blog posts
Client/Team Member Onboarding and Registration	What do you have in place or needs attention? Consider: • Welcome materials • Where to go to find things • Agreements • Frequently Asked Questions	Page 71
Financial systems	Finances keep a business running. Having established systems in receiving money and spending money is key to success. In addition to establishing business bank accounts, this may include budgeting and having monthly reports created around revenue, invoicing and sales.	Page 76
Communication	What are the channels you use for communication? What cost do they have? Are they the most efficient? What changes could you make to make them more streamlined and efficient? Which ones do others prefer to use?	
Project Management	In the virtual space, most of us are managing projects in a variety of ways. What project management systems are you using? What PM issues have evolved for you?	Project Management blog posts
Other	What other areas are important to consider around systems?	

✚ ACTIVITY

Note what's worked and what hasn't around the different systems in your work or business.

Do an audit on your systems. Consider:

- Systems to be created
- Systems which are working
- Systems being used in other organizations/parts of the organization which could be adopted
- Best practices around systems in your business

✚ CONNECTION TO THE WORKBOOK AND PLANNER

Refer to part 3 of the book and what is noted around systems. Part of doing a review is noting metrics and trends. Take a look back at your notes. What do you notice? You may want to:

Review the Annual Planners and Quarterly Tools

Review the Monthly Daily Planners – what do you notice?

Use brainstorm lists to capture these ideas around systems.