Business Systems Audit

A resource from Thrive Admin Services

Let’s objectively review what you have in place, and how it is working.

If a process or step isn’t relevant to you, leave it blank. It’s worth considering whether anything you leave blank would help you in a perfect situation, to give your client, or your business, a better experience.

There are some spare rows at the end for any specific processes you use that haven’t been detailed here.

Once you have entered all of the different processes and systems you use, tally everything up at the bottom of this resource.

| **Process** | **The system(s) you use** | **Program Cost** | **Does it work?** | **Do you use it?** |
| --- | --- | --- | --- | --- |
| **Enquires** |
| Contact form |       | $       /  | [ ]  | [ ]  |
| Book Call |       | $       /  | [ ]  | [ ]  |
| Confirming appointment |       | $       /  | [ ]  | [ ]  |
| Video Call |       | $       /  | [ ]  | [ ]  |
| Reminders / Follow Up |       | $       /  | [ ]  | [ ]  |
| **Quotes** |
| Proposal |       | $       /  | [ ]  | [ ]  |
| Information Pack |       | $       /  | [ ]  | [ ]  |
| Acceptance / Decline |       | $       /  | [ ]  | [ ]  |
| Service Agreement |       | $       /  | [ ]  | [ ]  |
| E-Signing |       | $       /  | [ ]  | [ ]  |
| Invoicing |       | $       /  | [ ]  | [ ]  |
| Lead Tracking |       | $       /  | [ ]  | [ ]  |
| Notes and file storage |       | $       /  | [ ]  | [ ]  |
| Reminders / Follow Up |       | $       /  | [ ]  | [ ]  |
| **Project / Service** |
| File sharing |       | $       /  | [ ]  | [ ]  |
| Client communication |       | $       /  | [ ]  | [ ]  |
| Client contact / data |       | $       /  | [ ]  | [ ]  |
| Workload tracking |       | $       /  | [ ]  | [ ]  |
| Follow ups |       | $       /  | [ ]  | [ ]  |
| Payments |       | $       /  | [ ]  | [ ]  |
| Review / Edits |       | $       /  | [ ]  | [ ]  |
| Final handover |       | $       /  | [ ]  | [ ]  |
| Access to content |       | $       /  | [ ]  | [ ]  |
| **Offboarding** |
| Invoice payment |       | $       /  | [ ]  | [ ]  |
| Feedback / Testimonial |       | $       /  | [ ]  | [ ]  |
| Archive content |       | $       /  | [ ]  | [ ]  |
| Access shutdown |       | $       /  | [ ]  | [ ]  |
| Storage of notes |       | $       /  | [ ]  | [ ]  |
| **Back End Systems** |
| Stock Orders / Count |       | $       /  | [ ]  | [ ]  |
| Stocktake |       | $       /  | [ ]  | [ ]  |
| Social Media content |       | $       /  | [ ]  | [ ]  |
| Social Media schedule |       | $       /  | [ ]  | [ ]  |
| Manage outsourced work |       | $       /  | [ ]  | [ ]  |
| Tracking expenses |       | $       /  | [ ]  | [ ]  |
| Mileage |       | $       /  | [ ]  | [ ]  |
| Product content |       | $       /  | [ ]  | [ ]  |
| Inventory Tracking |       | $       /  | [ ]  | [ ]  |
| Time tracking |       | $       /  | [ ]  | [ ]  |
| Business Finances |       | $       /  | [ ]  | [ ]  |
| Tax Obligations / Payments |       | $       /  | [ ]  | [ ]  |
| Marketing Material |       | $       /  | [ ]  | [ ]  |
| Professional Profile |       | $       /  | [ ]  | [ ]  |
| Automations |       | $       /  | [ ]  | [ ]  |
| Bios and Media Pack |       | $       /  | [ ]  | [ ]  |
| Workshop content |       | $       /  | [ ]  | [ ]  |
| Lead Magnets |       | $       /  | [ ]  | [ ]  |
| Contact Database |       | $       /  | [ ]  | [ ]  |
| Document Templates |       | $       /  | [ ]  | [ ]  |
| Team communications |       | $       /  | [ ]  | [ ]  |
| Human Resources |       | $       /  | [ ]  | [ ]  |
| Legal and Insurances |       | $       /  | [ ]  | [ ]  |
| **Other** |
|  |       | $       /  | [ ]  | [ ]  |
|  |       | $       /  | [ ]  | [ ]  |
|  |       | $       /  | [ ]  | [ ]  |
|  |       | $       /  | [ ]  | [ ]  |
|  |       | $       /  | [ ]  | [ ]  |
|  |       | $       /  | [ ]  | [ ]  |
|  |       | $       /  | [ ]  | [ ]  |

**Let’s review:**

Total number of systems listed above:

Total cost **per year** of these systems: $

Are these systems working for me: [ ]  YES [ ]  NO

Am I using the systems I have put in place: [ ]  YES [ ]  NO

**What if there was an easier way? What would it mean for me, my clients, and my business?**