

BUSINESS SYSTEMS

CHECKLIST



THE ESSENTIAL SYSTEMS
EVERY CEO NEEDS

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SYSTEMS **DON'T** REPLACE YOU...

THEY SUPPORT YOU.

One of the biggest misconceptions in business is that successful entrepreneurs simply work harder. The truth? Successful businesses are built on repeatable systems. *Not constant hustle.*

Systems help you:

- Create a consistent client experience
- Save time on repetitive tasks
- Reduce stress and decision fatigue
- Prevent important tasks from falling through the cracks
- Prepare your business for growth

Use this checklist as a guide to identify what's already working and what you can improve over time.

**Remember—you don't have to implement everything today.
Progress beats perfection every time.**



YOUR CEO SYSTEMS AUDIT

Instructions:

Place a ✓ beside each system you already have in place.

Circle the systems you want to build next.

BRAND FOUNDATION

Your brand should create consistency everywhere your business shows up.

- ☐ Brand Logo
- ☐ Brand Colors
- ☐ Brand Fonts
- ☐ Brand Voice
- ☐ Professional Headshots
- ☐ Website
- ☐ Professional Email Address
- ☐ Social Media Profiles

Reflection

Which branding element needs the most attention?

MARKETING SYSTEMS

Marketing should consistently attract new opportunities.

- ☐ Lead Magnet
- ☐ Email List
- ☐ Landing Page
- ☐ Welcome Email Sequence
- ☐ Content Calendar
- ☐ Social Media Scheduler
- ☐ Google Business Profile (if applicable)
- ☐ Analytics Tracking
- ☐ Call-to-Action Strategy

Reflection

Where are potential clients finding you today?

SALES SYSTEMS

Every inquiry deserves a clear, professional process.

- ☐ Discovery Call Process
- ☐ Pricing Guide
- ☐ Proposal Template
- ☐ Contract
- ☐ Invoice
- ☐ Online Payment Option
- ☐ Follow-Up Email
- ☐ CRM or Client Management System

Reflection

What's one part of your sales process you could simplify?

CLIENT EXPERIENCE SYSTEMS

An exceptional experience creates repeat clients and referrals.

- ☐ Welcome Email
- ☐ Client Questionnaire
- ☐ Scheduler
- ☐ Client Portal
- ☐ Automated Workflow
- ☐ Project Timeline
- ☐ Check-In Process
- ☐ Final Delivery Process
- ☐ Offboarding Email
- ☐ Testimonial Request
- ☐ Referral Request

Reflection

How do you want your clients to feel after working with you?

CEO SYSTEMS

Don't just work in your business. Lead your business.

- ☐ Weekly CEO Planning Session
- ☐ Monthly Financial Review
- ☐ Quarterly Goal Planning
- ☐ Annual Business Review
- ☐ Revenue Tracking
- ☐ Expense Tracking
- ☐ SOPs (Standard Operating Procedures)
- ☐ Password Manager
- ☐ File Organization
- ☐ Business Backup Plan

Reflection

What's one CEO habit you'll commit to this month?

AUTOMATION OPPORTUNITIES

If you repeat it... You can probably automate it.

Check anything you'd like to automate.

- ☐ Inquiry Responses
- ☐ Discovery Call Scheduling
- ☐ Contracts
- ☐ Invoices
- ☐ Payment Reminders
- ☐ Welcome Emails
- ☐ Appointment Reminders
- ☐ Client Questionnaires
- ☐ Follow-Up Emails
- ☐ Offboarding Process

MY NEXT 30-DAY SYSTEMS PLAN

Choose **THREE** systems to improve first

Priority #1: _____

Why does it matter?

Priority #2: _____

Why does it matter?

Priority #3 _____

Why does it matter?

REMEMBER...

Systems aren't about making your business feel robotic.

They're about creating space.

Space to serve your clients well.

Space to think strategically.

Space to rest.

Space to grow.

One of the most impactful systems I've implemented in my own business has been using Dubsado to streamline my client experience—from inquiries and contracts to invoices, questionnaires, scheduling, and workflows.

If you're ready to simplify your processes, be sure to:

- ✓ Enter to win a FREE 1-Year Dubsado Premier Plan (a \$525 value)
- ✓ Access my favorite Dubsado setup resources
- ✓ Download the CEO Clarity Toolkit

(Include your QR code here.)

CEO REMINDER

Your business shouldn't depend on your memory.

Build systems that support your vision, protect your time, and allow you to lead with confidence.

Strategy creates clarity.

Systems create freedom.

Consistency creates growth.