



Free Systems Efficiency Checklist

A guided review of how efficiently
your business systems actually operate



How to Use This Checklist

- Review each statement carefully.
- Check the box that best reflects your current reality.
- Be honest — this is for clarity, not perfection.
- Any unchecked or uncertain item highlights an opportunity for improvement.

Your Quick Guide:

Check the box that applies to you

- ☐ Yes – This is consistently in place
- ☐ No – This is not in place
- ☐ Not Sure – I'm unsure how this works



1

Lead Management & CRM Systems

- ☐ All leads automatically enter a centralized CRM
- ☐ Lead sources are clearly identified and tracked
- ☐ No leads are manually copied, pasted, or re-entered
- ☐ Follow-up tasks are automatically assigned
- ☐ Lead status updates based on actions or triggers
- ☐ Sales pipeline stages are clearly defined
- ☐ Leads are not lost or forgotten
- ☐ Duplicate leads are prevented or managed

2

Client Onboarding & Lifecycle Management

- ☐ Client onboarding steps are standardized
- ☐ Contracts, forms, and agreements are sent automatically
- ☐ Payment collection is integrated into onboarding
- ☐ Clients receive consistent onboarding communication
- ☐ Internal teams are notified when onboarding is complete
- ☐ Client records update automatically after onboarding
- ☐ Onboarding does not rely on manual emails or memory

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Workflow Automation & Daily Operations

- ☐ Core workflows are clearly documented
- ☐ Repetitive tasks are automated
- ☐ Manual handoffs between team members are minimized
- ☐ Tasks are triggered automatically by system events
- ☐ Status updates do not require manual input
- ☐ Each workflow has a clear owner
- ☐ Systems continue working even when someone is out

4

System Integrations & Data Flow

- ☐ Core tools are connected (CRM, email, calendar, payments)
- ☐ Data flows between systems without duplication
- ☐ Integrations are monitored for failures
- ☐ Errors are flagged automatically
- ☐ There is documentation explaining how systems connect
- ☐ Integrations are reviewed and maintained

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Reporting, Dashboards & Visibility

- ☐ Lead, client, and revenue data live in one place
- ☐ Dashboards update automatically
- ☐ Reports are accurate and trusted
- ☐ Spreadsheets are not required for core reporting
- ☐ Key metrics are clearly defined
- ☐ Bottlenecks and drop-offs are easy to identify

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Team Efficiency & Access Control

- ☐ Roles and permissions are clearly defined
- ☐ Access is granted and revoked systematically
- ☐ New team members onboard quickly
- ☐ Information is easy to find
- ☐ Processes don't rely on "tribal knowledge"
- ☐ Systems work consistently regardless of who is working

7

Scalability & Risk Management

- ☐ Systems can handle increased volume
- ☐ Safeguards exist for system failures
- ☐ Critical workflows have backups
- ☐ Documentation exists for key processes
- ☐ No single system failure halts operations
- ☐ No single person holds all system knowledge

8

Automation Volume & Performance

- ☐ Automations match current workload volume
- ☐ Systems are tested under real conditions
- ☐ High-volume workflows are optimized
- ☐ Error handling is built into critical automations
- ☐ Usage limits and thresholds are monitored

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AI & Advanced Capabilities (Optional)

- ☐ AI is used to reduce manual work
- ☐ AI tools are integrated into existing systems
- ☐ AI outputs are reviewed and validated
- ☐ AI supports reporting or decision-making
- ☐ AI automations align with business goals

- ☐ Systems feel organized and predictable
- ☐ Issues are detected early
- ☐ Changes are documented and controlled
- ☐ You feel confident in how the business operates
- ☐ Systems support growth instead of limiting it



How to Interpret Your Results



- Mostly **“Yes”**
- Your systems are functioning well, with room for optimization.



- A mix of **“Yes,” “No,” and “Not Sure”**
- You're likely losing time, visibility, or scalability due to inefficiencies.



- Mostly **“No” or “Not Sure”**
- Your systems are creating risk, wasted effort, and missed opportunities.

Recommended Next Step

If you checked **“No” or “Not Sure”** on multiple items, your business may benefit from:



- A systems audit
- Workflow optimization
- Automation improvements
- Or a systems rescue if things are breaking



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