SYSTEMS AND CHECKLISTS: RUNNING THE BUSINESS WITHOUT DOING EVERYTHING YOURSELF

How to write down how work gets done, so quality stays high and the business doesn't depend only on you.

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AT A GLANCE

- A **system** is a written, repeatable way of doing a task, such as a checklist, a step-by-step guide or a short video.
- Systems let others do work to your standard, free your time, and make your business **more valuable** to lenders, investors and future buyers.
- Start with the tasks you repeat most, and keep them **short and simple**.

Why it matters

When everything lives in the founder's head, the business can't grow past the founder's hours, and it struggles when the founder is sick or away. Investors and buyers pay more for businesses that run smoothly without depending on one person. See **X-04 Getting Your Business Ready to Sell**.

What to write down first

Area	Examples
Daily operations	Opening and closing checklists, cleaning routines
Customer service	How to greet, book, handle complaints. See **L-11 Customer Service That Brings People Back**.
Delivering the product or service	Recipes, service steps, quality checks
Money	Cash handling, end-of-day close, weekly bookkeeping. See **M-14 Monthly Money Checklist**.
Hiring and training	Onboarding checklist, training steps
Marketing	Posting schedule, review requests

Step by step

1. **List your repeating tasks.** Circle the 5 that take the most time or cause the most mistakes.
2. **Do the task once while writing each step**, or record a short video on your phone.
3. **Keep it short**: one page, numbered steps, with photos where helpful.
4. **Test it**: have someone else follow it while you watch. Fix what's unclear.
5. **Store all systems in one shared place**, like a shared folder or an operations binder.
6. **Review them** every few months, and whenever something goes wrong.

> EXAMPLE
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> **Rosa** wrote a one-page cleaning checklist for each room type, with photos of what "done" looks like. New cleaners trained in 2 days instead of 2 weeks, and complaints dropped. When she later talked to investors, her binder of systems was one of the first things they asked to see.

Tools that help

- Simple checklists in a shared document or app
- Short how-to videos
- Scheduling, booking and point-of-sale tools that automate routine steps. See **O-07 Choosing Tools and Software**.
- Automations that send reminders, review requests and invoices

Common mistakes

- **Writing long manuals no one reads.**
- **Writing systems and never updating them.**
- **Not training people on them.**
- **Keeping everything in your head** "because it's faster."

Your checklist

- ☐ List your repeating tasks
- ☐ Write checklists for the top 5
- ☐ Test each with someone else
- ☐ Store them in one shared place
- ☐ Schedule a review every 3 months

Where to go next

- **O-07 Choosing Tools and Software**
- **X-04 Getting Your Business Ready to Sell**
- **O-05 Managing Your First Team**

IMPORTANT
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