

CHECKLIST | FREE RESOURCE

Business Systems Health Check

Who it is for	Owners and managers of growing businesses with 15 to 300 people
What you will get	Find out how well your tools and daily work fit together, and pick the two fixes worth doing first.
Time needed	About 20 minutes

Tick each statement that is true for your business today. Be honest. A statement that is only sometimes true is not ticked. There are no wrong answers. The goal is to see where time and money are leaking.

Your tools

- ☐ We can list every software tool and subscription the business pays for.
- ☐ Each tool has one named owner inside the company.
- ☐ We know which tool is the main record for customers, for jobs or orders, and for invoices.
- ☐ On a normal day, nobody has to type the same information into more than one system.
- ☐ A new employee can get the access they need within a day, and access is removed when they leave.

Daily work

- ☐ Quotes, orders or service requests go through the same steps every time.
- ☐ A sick day or a holiday does not stop approvals.
- ☐ We can find the status of any job, order or customer within a couple of minutes.
- ☐ Follow-ups happen on a schedule, not from memory.
- ☐ Customers rarely have to repeat information they have already given us.

Numbers

- ☐ Owners can see revenue, open work and unpaid invoices without asking someone to build a report.
- ☐ Two people looking at the same number get the same answer.
- ☐ Month-end does not involve copying figures between spreadsheets.

Basic protection

- ☐ Important files and data are backed up, and we have tested restoring them.
- ☐ Each person has their own login, and multi-factor sign-in is on for email and finance tools.
- ☐ We know where customer personal information is stored.

How to read your score

Count your ticks and find your range.

0 to 5 ticks	Start with the basics. List your tools and choose one main record for each type of information.
6 to 11 ticks	You have a base to build on. Pick the two unticked items that cost you the most time and fix those first.
12 to 16 ticks	You are in good shape. Look at the repetitive tasks that remain and decide which could be automated.

Next step

Not sure which fix to start with? Bring your results to a strategy call and we will talk through them.

Talk to NEXORA: growth@nexorayyc.io | nexorayyc.io/contact

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