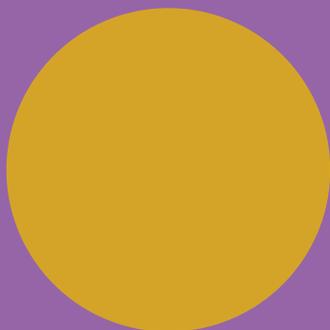




Organize and Automate

Systemize to Scale
Finding your path forward



Ana's
Simple Solutions



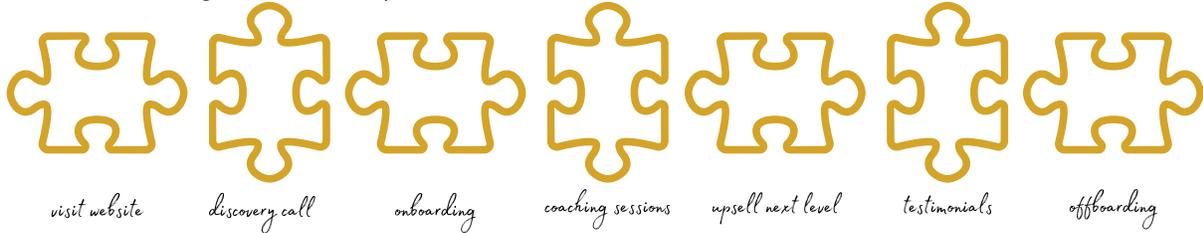
Have questions? Contact me! Anasimplesolutions.com/contact.

Quick-start your systems



What is your client Journey?

Write or draw out the "path" your client takes to discover you, join your program, interact with you via worksheets, meetings, forms, etc all the way through to their final touchbase. High-level example below.



Which area of your biz could be systemized?

Look at your client journey, and all the steps your client goes through. Which part of that process could either be most easily systemized (done through a series of steps for a specific outcome every time) make two columns, can be systemized, and can't be systemized

Scheduling
Onboarding

Write down all the steps

Having identified your client journey, specific areas that can be systemized, and the touch-points identified in each one, list out all the steps one by one.

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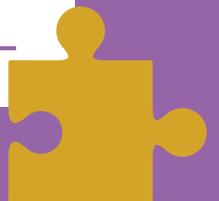
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What tools will you need?

Now that you know all of the steps needed to complete your system, analyze the types of tools you may need/want to implement. Think about how much of this process you want to manually do or have a team-member do, or automate through technology. [Link to Tools of the Trade](#)



Implement

Now that the hard work is done, the implementation of this system and process should be straightforward. Use your steps and touchpoints to identify and create all of the needed collateral, organize them in a centralized place, set up the steps in the platform or SOP of your choice.

Your System

Your Collateral / Touchpoints

Your Tool

Implementation is where most business owners start to get overwhelmed and sometimes see holes in the process they just laid out. This is OKAY and expected, we all see our processes from a different angle when we are down in the weeks. Just adjust and move to the next step.