

SMARTER WORKsheet

Your time is **valuable**, and you need all the extra time you can get. Ensure your energy and productivity are **maximized**. Get back to doing what you love while **empowering** business growth. Complete the worksheet below to gain clarity about your priorities and discover opportunities to delegate.

1 IDENTIFY YOUR DAILY PAIN POINTS

Think about the daily actions involved in running your business. Brainstorm typical activities you do in a day. Circle or highlight those you suspect are not the best use of your time.

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2 AUDIT YOUR KEY PRACTICES

Look at the key areas of your business (operations, marketing, strategy & planning, accounting, client services, HR, etc.), and then consider the tools you are (or aren't) using. What are the important processes in each area? Are workflows documented and available to others working on your business?

OPERATIONS

I could use help with:

- Executive Admin
- Project Management & Special Projects
- Client Support & Onboarding
- Inbox Organization
- Calendar
- Travel Arrangements

Do you know if your business is operating efficiently?

- Yes No Needs improvement

STRATEGIC PARTNERSHIPS

I need a resource to assist with:

- Accounting & Bookkeeping
- Website Development
- IT Support
- Graphic Design
- Human Resources

MARKETING

I could use help with:

- Social Media Management
- Content Creation/Curation
- Email Marketing Campaign
- Website Updates, SEO & Blogs
- CRM Systems & Reporting
- Lead Generation

Do you track key digital marketing metrics?

- Yes No Needs improvement

STRATEGY

I could use help with:

- Process Creation & Implementation
- Setting Priorities & Goals
- Action Planning
- Systems Formation & Documentation
- Sales Systems & Processes

How much time in a month do you allocate for strategic planning and assessing trends in your business? _____

