

# 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?* \_\_\_\_\_

TOOLS & TECHNOLOGIES

List the tools/technologies you are using. Are you using your tools efficiently? Are you interested in adding technologies?

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SYSTEMS & PROCESSES

Do you have systems and processes documented, so that you can delegate, plan for emergencies, and/or take a vacation? Which key work processes remain to be documented?

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3 ESTABLISH YOUR PRIORITIES

Review your answers to part 1 and compare them to your responses in part 2. Which areas need improvement immediately and which areas need to be moved down the priority list? Flag the ones that would most significantly impact your bottom line or free up your time. List your top 3 activities to prioritize and your top 3 to eliminate, delegate, or outsource. Commit to blocking time on your calendar to work in your focus areas, and find a resource to assist you with everything else.

MY TOP 3 FOCUS AREAS

- 1.
- 2.
- 3.

MY TOP 3 ACTIVITIES TO ELIMINATE/DELEGATE/OUTSOURCE

- 1.
- 2.
- 3.



Want to go even further with a turnkey operations team in your corner?

There is a smarter, **easier** way to do business. Let's discuss how Remote COO can help empower your business growth today. We'd love to book a free consultation to review your worksheet with you. Reach us at [remotecoo.com/contact-us](https://remotecoo.com/contact-us).

Remote COO is committed to your **success!**

