



BUSINESS SYSTEMS AUDIT

A clear-eyed look at what's working, what's not,
and what to fix first.

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SUMMARY SCORECARD

A quick, at-a-glance view of how each area of your back office is currently performing.

- ✓ Biggest strength: Client Communication
- ✓ Biggest time drain: Duplicate data entry
- ✓ Cash-flow opportunity: Automated invoice reminders
- ✓ Recommended first action: Consolidate scheduling

AREA	RATING	SNAPSHOT
 Quoting	 Amber	Quotes go out reliably, but around one-third receive no follow-up if the client doesn't respond
 Scheduling & Workflow Management	 Red	Work is tracked across two separate tools, causing double-handling and occasional scheduling clashes.
 Invoicing & Payments	 Amber	Invoicing is timely, but payment follow-up is manual and inconsistent.
 Client Communication	 Green	Responsive and personal — client feedback on communication is consistently positive.
 Tools & Tech Stack	 Red	Several tools in use don't talk to each other, creating repeated manual data entry.
 Automation & Manual Tasks	 Red	Multiple manual, repeatable tasks identified with clear automation opportunities.

 Green = Working well

 Amber = Needs attention

 Red = Priority action

KEY FINDINGS

What's Working Well

- ✓ Same-day enquiry responses, consistently praised by clients
- ✓ Quotes sent out within 24 hours
- ✓ Invoices issued promptly, keeping cash flow relatively healthy

Quoting

Quotes are sent out within 24 hours using Google Docs templates, which is a real strength. But based on your intake answers, roughly 1 in 3 quotes never get a follow-up once sent — there's no system prompting a check-in after 3-5 days. On your current quote volume (around 12/month), that's approximately 4 warm leads a month with no second touchpoint.

Scheduling & Job Management

Work is currently tracked in both Google Calendar and a separate Excel sheet, updated manually in both. You mentioned this caused a scheduling clash last month — and based on your workload, this duplicate entry is likely costing around 30-40 minutes a week in re-entry alone, before counting the risk of another clash.

Invoicing & Payments

Invoices go out through Xero within 2 days of work completion, which keeps cash flow relatively healthy. The gap is in payment chasing — you noted overdue invoices are followed up "whenever I remember," with no set reminder schedule, which is likely delaying a portion of your ~\$4,000/month in receivables by a week or more.

Client Communication

This is a genuine strength. You're responding to enquiries same-day by phone or text, and client feedback (per your intake notes) consistently highlights how personal it feels. This is worth protecting as other systems are improved, the goal is to streamline admin without losing this personal touch.

Tools & Tech Stack

Your current stack Google Calendar, Excel, Xero, and email don't sync with one another. This means client details and status updates are typed in at least 3 separate times, which based on your volume adds up to an estimated 2-3 hours a week in avoidable manual entry.

Automation & Manual Tasks

Three clearly repeatable tasks were identified from your intake form: invoice payment reminders, booking confirmations, and quote follow-ups. All three are currently done manually (or not at all) but could be automated within your existing Xero and calendar tools with minimal setup.

TOP 3 PRIORITIES

Of everything identified in this audit, these three would make the biggest difference first.

1

Stop double-entering jobs in Calendar and Excel

Move tracking into Google Calendar only, using shared notes instead of the spreadsheet. This removes the clash risk and gets back roughly 30-40 minutes a week.

2

Turn on Xero's automatic payment reminders

Xero already supports scheduled reminder emails — switching this on for overdue invoices would improve consistency on your ~\$4,000/month in receivables, at no extra cost.

3

Add a 3-day quote follow-up step

A short templated follow-up sent automatically 3 days after any unactioned quote would help convert more of the ~4 warm leads currently going quiet each month.

ESTIMATED IMPACT

Based on the findings in this audit, these improvements are likely to deliver the greatest return in time savings, efficiency and cash flow.



Time Savings

Reduce manual admin by 2-3 hours per week. That's approximately **120-150 hours back per year**

Once duplicate data entry is removed and scheduling runs through a single system, that reclaimed time can go straight back into client work and business growth rather than re-entering the same information twice.



Improved Cash Flow

Consistent, automated follow-up on overdue invoices

Right now, chasing payments happens "whenever there's time." Automating this removes the guesswork, so overdue invoices get followed up the same way, every time without it depending on memory.



Better Lead Conversion

A structured process for quotes that go quiet

Roughly 1 in 3 quotes currently get no follow-up at all. A simple, automatic check-in catches these before they're forgotten turning some of those quiet leads back into real conversations.



Potential Outcome

Small changes in process often create the biggest gains. The recommendations in this audit focus on practical improvements that deliver measurable results without adding unnecessary complexity.

90-DAY ACTION PLAN

Recommended order of implementation based on impact, effort and business priorities.



Month 1

Simplify Scheduling

- ✓ Remove duplicate job tracking
- ✓ Establish one source of truth for scheduling
- ✓ Standardise job notes and client information



Month 2

Streamline Payments

- ✓ Activate automated payment reminders
- ✓ Review invoicing workflow
- ✓ Create consistent overdue payment process



Month 3

Improve Follow-Up Systems

- ✓ Implement quote follow-up process
- ✓ Create communication templates
- ✓ Review results and refine systems



Focus on progress, not perfection.

Implementing a few high-impact improvements consistently will deliver better results than introducing multiple new systems at once.

RECOMMENDED NEXT STEPS

Suggestions below are matched to your business's size, tech comfort, and budget, starting simple, with room to grow.

- **Consolidate** — Retire the Excel job tracker and keep Google Calendar as the single source of truth, using event notes for job details
- **Prioritise** — Focus first on the scheduling fix and payment reminders. These two alone address the biggest time and cash-flow drains
- **Standardise** — Set up a simple templated quote follow-up email, sent automatically 3 days after an unactioned quote, using your existing Google Docs quote templates as the base
- **Automate** — Turn on Xero's built-in reminder sequence (Day 3, Day 7, Day 14 overdue) — no new tool or cost required
- **Review** — Revisit this scorecard yourself in 3 months to check progress and catch any new manual workarounds creeping back in.

Need help implementing these recommendations?

I can help set up, document, and manage these improvements through one of my ongoing business support packages, so they don't just stay as good ideas on a page.

[Book a discovery call](#)



THANK YOU

Thank you for the opportunity to look under the hood of your back office. Every business has a handful of small, fixable things quietly costing time or money. The aim of this audit is simply to make those visible, so you can decide what to tackle first.

If you'd like to talk through any of these findings, or discuss what implementation could look like, [book a time to chat](#) — I'd love to jump on a call.

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