BOTTLENECK BREAKDOWNS · ISSUE 01 COMPANION

# The Run on Systems Kit

The tools I use in a new client's first week to get the business out of the founder's head and into a system. Print it or fill it in on screen.


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START HERE

# The 10-Minute Test

Most founders don't have a hiring problem. They have a memory problem: the business only works because one person remembers how everything works. This test shows you, on one page, how much of your business lives in your head.

**1**

**Set a 10-minute timer.** The limit is the point. If a step takes longer than a line to explain, that's a finding, not a failure.

**2**

**Write how it works today.** Not how it should work. Every step between a new inquiry and a paid invoice, in order.

**3**

**Add two things per step.** Who does it, and where it's tracked. "In my head" and "nowhere" are allowed. They're the useful answers.

## Answer these six questions as you go

Each one is a step most founders skip when they describe their business out loud.

01

### Where do new inquiries come in?

Website form, DMs, email, phone, referrals. List every door, even the ones that only open once a month.

02

### Who replies first, and how fast?

Name a person, not a team. Then write the honest speed, not the goal.

03

### What happens if they don't book or buy right away?

This is where most leads disappear. If the answer is "I try to remember," write that.

04

### How does the proposal or price get sent?

Template, fresh document, a quick DM? Note where the last one lives.

05

### What happens after someone pays?

Welcome email, kickoff call, access, a form. Write the order it actually happens in.

06

### Who sends the invoice, and who follows up if it's late?

The follow-up is the step that usually has no owner at all.

TIMER ON

# Inquiry to paid invoice

Business: _____

Date: _____

| # | STEP, AS IT WORKS TODAY | WHO DOES IT | WHERE IT'S TRACKED | BUCKET |
|---|---|---|---|---|
| 01 | | | | T W A |
| 02 | | | | T W A |
| 03 | | | | T W A |
| 04 | | | | T W A |
| 05 | | | | T W A |
| 06 | | | | T W A |
| 07 | | | | T W A |
| 08 | | | | T W A |
| 09 | | | | T W A |
| 10 | | | | T W A |
| 11 | | | | T W A |
| 12 | | | | T W A |
| 13 | | | | T W A |
| 14 | | | | T W A |

Bucket: **T** Track it in the CRM · **W** Write it as an SOP · **A** Automate it. Fill this column in after the timer, using page 4.

| Total steps _____ | Steps with my name _____ | Tracked "nowhere" _____ |
|---|---|---|

TIMER OFF

# What your page is telling you

| | |
|---|---|
| RESULT A<br>**Runs on a system** | Mostly other people's names, and a tool for every step. You're ready to delegate. Use the buckets below to tighten the weakest step, then hand it off. |
| RESULT B<br>**Runs on memory** | Your name next to most steps, or "in my head" as the tracking. That's normal at this stage. It's also the most expensive way to grow, because every new client adds work only you can do. |
| RESULT C<br>**Couldn't finish** | Start here, before you hire anyone. Nobody can take over a process that nobody can describe. Finish the page first, even if it takes three sittings. |

## Sort every step into one of three buckets

What's left after the three buckets is the work that actually needs you: sales conversations, decisions and relationships.

### T

### Track it in the CRM

Anything that's a status. If you need to know where something stands, it belongs in a pipeline stage, not in your head or your inbox.

EXAMPLES

- New inquiry
- Follow-up due
- Proposal sent
- Paid

ASK

"Would I ever need to check where this stands?"

### W

### Write it as an SOP

Anything a person has to do the same way every time. One page each, linked inside the CRM stage where it's used.

EXAMPLES

- Replying to inquiries
- Onboarding a client
- Handling a refund

ASK

"Could a new person do this from the page alone, on the first try?"

### A

### Automate it

Anything that's a reminder, a copy-paste job, or a "did we send that?" moment. These are the steps people forget first.

EXAMPLES

- Follow-up emails
- Payment reminders
- Intake forms
- Welcome emails

ASK

"Is a person adding judgment here, or just remembering?"

WHAT AN HONEST PAGE LOOKS LIKE

# A typical service business

An illustration, not a real client. Notice that nothing here is unusual. It's what a business looks like when it grew faster than its systems.

| # | STEP | WHO | WHERE IT'S TRACKED | BUCKET | THE FIX |
|---|---|---|---|---|---|
| 01 | New inquiry from the website form | Founder | Email inbox | TRACK | Form creates a CRM card in "New inquiry" |
| 02 | Reply with availability | Founder, when she sees it | Nowhere | WRITE | Inquiry reply SOP with a saved script (page 7) |
| 03 | Follow up if no reply | Founder, if she remembers | Nowhere | AUTOMATE | Follow-up date on the card, reminder sent automatically |
| 04 | Send the proposal | Founder | Google Docs | TRACK | Stage "Proposal sent" with the date it went out |
| 05 | Collect payment | Founder | Stripe | TRACK | Card moves to "Won" when paid |
| 06 | Send the onboarding email | Founder | Copied from an old email | AUTOMATE | Welcome email fires on payment (page 8) |
| 07 | Chase a late invoice | Nobody | Nowhere | WRITE | Late invoice SOP with set reminder days (page 9) |

**7 · 6 · 3** Seven steps. Six with the founder's name. Three tracked nowhere. The red cells are the first fixes: steps with no owner, no tool, or only one person who knows how.

### Circle these on your own page

Any step tracked "nowhere." Any step owned by "whoever sees it first." Any step where your name appears and you'd rather it didn't. Those circles are your Day 2 to Day 5 list.

FIVE DAYS, ONE CHANGE A DAY

# Stop running on memory this week

Small on purpose. Each day ends with something finished, so you never have a half-built system sitting in a tab.

**DAY 1**

☐ **Take the 10-minute test**

Use page 3. Then fill in the bucket column with page 4 open beside it.

DONE WHEN
Every step has a name and a "where," even if the answer is "nowhere."

**DAY 2**

☐ **Set up pipeline stages that match your page**

Request your mini CRM (page 10), or use the CRM you already have. Match the stages to the words you used on your page.

DONE WHEN
Every open lead and client sits in exactly one stage, with a next step date.

**DAY 3**

☐ **Write one SOP for the step you repeat most**

Start from the closest template on pages 7 to 9. Write it while you do the task, not from memory.

DONE WHEN
It fits on one page and lives inside the CRM stage where it's used.

**DAY 4**

☐ **Automate one reminder**

Usually the follow-up or the late invoice. Pick the one that has cost you money before.

DONE WHEN
You've tested it on yourself and watched it arrive.

**DAY 5**

☐ **Hand one task to someone else**

Give them the SOP and nothing else. Stay quiet and watch where they get stuck.

DONE WHEN
Every question they asked is now a line in the SOP.

**Fri** By Friday you'll know exactly what to delegate, and how to delegate tasks without becoming the bottleneck yourself.

STANDARD OPERATING PROCEDURE

# Replying to a new inquiry

| OWNER | TRIGGER | TOOLS | DONE WHEN |
|---|---|---|---|
| Name | A new inquiry arrives | CRM, inbox, calendar link | Reply sent, card in CRM, next step dated |

## STEPS

01 **Check every inquiry door** at set times each day. Write your doors and times: _____

02 **Create or find the CRM card.** Stage: New inquiry. Add source, date, and what they asked for in their words.

03 **Qualify in one line.** Do they need what we sell, and is there a timeline? Note it on the card.

04 **Send the reply** using the script on the right. Personalize the first line. Include one clear next step.

05 **Set the follow-up date** on the card before you close it. No card leaves this step without a date.

06 **Move the stage** to Contacted. If they booked, move it to Call booked instead.

07 **If it's not a fit,** reply kindly, point them somewhere useful, and mark the card Lost with the reason.

## REPLY SCRIPT

> *Hi [Name], thanks for reaching out about [what they asked for]. That's exactly the kind of work we do. The easiest next step is a short call so I can understand [their situation]. You can pick a time here: [link]. If a call isn't convenient, reply with [one question] and I'll send next steps by email.*

## COMMON MISTAKES

- Replying from your phone and never logging it
- Answering every question in the first email
- No next step, so the thread just stops

**AUTOMATE THIS** Have your website form create the CRM card for you, and send an instant "got it, here is what happens next" reply. A person still writes the real answer in step 4.

## YOUR NOTES AND CHANGES

LAST UPDATED

REVIEWED BY

LINKED IN CRM STAGE

STANDARD OPERATING PROCEDURE

# Onboarding a new client

| OWNER | TRIGGER | TOOLS | DONE WHEN |
|---|---|---|---|
| Name | First payment received | CRM, email, form, project tool | Kickoff held, access confirmed, first deliverable dated |

## STEPS

01 **Confirm payment** and move the CRM card to Won. Add the start date.

02 **Send the welcome email** the same day, using the script on the right. This is the best step to automate first.

03 **Send the intake form.** Ask only what you need to start: goals, access, key contacts, deadlines.

04 **Request access** with a written list. Track what's received and what's still missing.

05 **Book the kickoff call.** Share a short agenda the day before.

06 **Hold the kickoff.** Confirm scope, the first deliverable and its date, and how updates will be sent.

07 **Send a recap** within one business day: what was agreed, who owns what, what happens next.

08 **Create the project** in your project tool and link it on the CRM card.

## WELCOME EMAIL

> *Hi [Name], welcome in. We're glad to be working together. Here's what happens next: today you'll get a short intake form, then we'll book our kickoff call for [timeframe]. Before then, the most helpful thing you can do is [one action]. If anything comes up, reply here and I'll see it.*

## COMMON MISTAKES

- Starting the work before access is complete
- Ten intake questions when four would do
- No written recap, so scope drifts

**AUTOMATE THIS** Trigger steps 2 and 3 from the payment itself: when the invoice is paid, the welcome email and intake form go out on their own, the same day, every time.

YOUR NOTES AND CHANGES

LAST UPDATED

REVIEWED BY

LINKED IN CRM STAGE

STANDARD OPERATING PROCEDURE

# Following up on a late invoice

| OWNER | TRIGGER | TOOLS | DONE WHEN |
|---|---|---|---|
| Name | Invoice passes its due date | Invoicing tool, CRM, email | Paid, or escalated to the founder |

## STEPS

01 **Before the due date,** send a friendly reminder with the invoice link. Our timing: ____ days before

02 **On the due date,** check payment status. If unpaid, mark the card Overdue in the CRM.

03 **First follow-up.** Short and warm, using the script on the right. Our timing: ____ days after due

04 **Second follow-up.** Restate the amount, the due date and the payment link. Ask if anything is blocking payment.

05 **Escalate** to the founder with the history: dates sent, replies, amount. Our timing: ____ days after due

06 **Log every touch** on the CRM card so anyone can pick it up mid-way.

07 **When paid,** send a thank-you and clear the Overdue flag.

Set the timings to match your payment terms, then automate steps 1, 3 and 4. The escalation stays with a person.

## FIRST FOLLOW-UP

> *Hi [Name], a quick note that invoice [number] for [amount] was due on [date]. Here's the link again in case it got buried: [link]. If anything's holding it up on your side, just let me know and we'll sort it out.*

## COMMON MISTAKES

- Waiting weeks because it feels awkward
- Following up from memory, with no log
- Changing the tone each time, so it feels personal

**AUTOMATE THIS**

Most invoicing tools can send steps 1, 3 and 4 on a schedule. Turn those on, keep the wording from this page, and leave the escalation with a person.

## YOUR NOTES AND CHANGES

LAST UPDATED

REVIEWED BY

LINKED IN CRM STAGE

DONE FOR YOU

# Your mini CRM, set up for you

A CRM that tells you what's overdue the moment you open it. Reply CRM to your welcome email with your business name, and I'll send you a copy set up with your company name and colors.

| New inquiry | Contacted | Call booked | Proposal sent | Won | Lost |
|---|---|---|---|---|---|
| Came in, not replied to yet | Replied, waiting on them | A date is on the calendar | Price is in their hands | Paid. Onboarding starts | Closed, with a reason |

Rename any stage to match the words on your page. Keep it to six or fewer.

## What each column does

| | |
|---|---|
| **Stage** | A dropdown. Every card is in exactly one stage. |
| **Next step + date** | The single next action and when it's due. This column is what makes it a CRM instead of a contact list. |
| **Status (automatic)** | Shows **Overdue** when the next step date has passed, **Due today**, or **No next step** when the date is empty on an open deal. |
| **Days in stage (automatic)** | Counts days since the stage last changed, so stalled deals are easy to spot. |
| **Dashboard tab** | Counts per stage, open pipeline value, and how many follow-ups are overdue today. |

**Pipeline** | Dashboard | Lists

| NAME | STAGE | NEXT STEP | DATE | STATUS | DAYS IN STAGE |
|---|---|---|---|---|---|
| Sample Client A | Proposal sent | Follow up on proposal | Nov 2 | Overdue | 6 |
| Sample Client B | Contacted | Second follow-up | Nov 7 | Due today | 3 |
| Sample Client C | New inquiry | | | No next step | 1 |
| Sample Client D | Call booked | Discovery call | Nov 10 | On track | 2 |

Preview with sample rows. The status column fills itself in.

## Three steps to start

**1.** Delete the sample rows and add every open lead and client. **2.** Give each one a next step and a date. **3.** Open the sheet first thing each morning and clear every red row before anything else.

# One system at a time.

Every Saturday, Bottleneck Breakdowns takes one part of a small business's operations, shows what breaks and why, and hands you the system that fixes it, with a free tool you can use the same day.

| | |
|---|---|
| NEXT SATURDAY | **The 5 follow-ups most small businesses never send,** and how to automate them. |
| SUBSCRIBE | Search **Bottleneck Breakdowns** on LinkedIn, or find it on my profile, so each issue reaches your inbox. |
| STUCK ON A STEP? | Send me the step you couldn't write down. I read every message, and the most common ones become future issues. |

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