

Business systems readiness

Start with one business and one workflow.

01 What do you sell, to whom, and who owns the business decisions?

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02 Trace one real inquiry through booking, delivery, payment and follow-up. Where does information get copied or lost?

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03 List your current tools, who owns each account, and what each costs. Which tool is the record of truth for bookings, customers and payments?

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04 Choose three manual bottlenecks. Estimate minutes per week from what you actually observe. Pick one to improve first.

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05 Which computer will you use? Do you control administrator access, backups, and your own vendor accounts and two-step verification? Never write passwords on this worksheet.

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06 Which actions need your approval: customer messages, bookings, purchases, refunds, publishing or access changes?

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07 What data should stay private? Can a new workflow be rehearsed with made-up records first?

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08 Define a successful handover: you can run, pause, diagnose, export and recover the workflow yourself.

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09 Who teaches your industry craft, if that is needed? Who can assess it? No partner is assumed.

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10 What time can you protect for preparation, practice and support? What would that displace?

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Bring this to a scoped conversation. A proposal should state supported tools, deliverables, dates, exclusions, account ownership, price and support limits before any payment.

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