

FREE WORKBOOK

Systems Audit Workbook

Map your tools, find the double handling and put a dollar figure on the waste. The same framework I use in paid audits.



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Before you start

Block out two hours. Get the people who do the work in the room, not just the managers. Bring a list of every software subscription from your credit card or accounts. Be honest: this is for you, not for show.

Step 1. Tool inventory

List every tool that stores or moves business data. Include spreadsheets and shared inboxes, they count.

Tool	Used for	Owner	Monthly cost	Users	Keep / Fix / Cut

Step 2. Map your core process

Pick one process that runs often, like lead to quote to job to invoice. Write every step, the tool used, and who does it. Circle every step where someone re-types information.

#	Step	Tool	Who	Minutes	Re-typed? (Y/N)

Step 3. Price the double handling

For each re-typed or manual step: **minutes per occurrence x occurrences per week x 48 weeks / 60 x hourly cost.**

Example. Copying won deal details from the CRM into the project tool takes 12 minutes. It happens 25 times a week. $12 \times 25 \times 48 / 60 = 240$ hours a year. At \$55 an hour fully loaded, that's \$13,200 a year for one copy-paste job.

Manual step	Mins	Per week	Hours / year	\$ / hour	\$ / year
Total cost of manual work					

Step 4. Data health snapshot

Question	Answer
How many systems hold customer contact details?	
Roughly what % of CRM records are duplicates?	
Who owns data quality? (name)	
Which report takes longest to build each month?	
Which numbers does leadership not trust?	
When were subscriptions last reviewed?	

Step 5. Score each area

1 = painful, 5 = works well.

Area	1	2	3	4	5
Lead capture and follow-up					
Quoting and proposals					
Project handover and delivery					
Invoicing and payments					
Reporting and dashboards					
Marketing measurement					
Document storage and search					
Staff onboarding and offboarding					

Step 6. Your top three fixes

Rank by dollar value from Step 3, then by how much the team will thank you.

#	Fix	Annual saving	Owner	By when

Want me to run this for you?

The Systems and Marketing Audit (\$4,950, two weeks, fixed price) covers every tool and process, scores your CRM and data, ranks AI and automation opportunities, and gives you a costed 90-day roadmap.

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