

Systems & Processes Toolkit — Read Me First

Get the business out of your head and into simple, usable systems your team can follow.

This toolkit helps you map key processes, write lightweight SOPs, clarify roles, and run a simple improvement cadence. The goal is fewer mistakes, less reliance on key people, and smoother delivery.

Outcome (what you'll have completed)

- A list of your key processes (your 'systems register').
- 1–3 process maps for the most important workflows.
- Simple SOPs for the critical steps (not long manuals).
- Role clarity and handover notes so work doesn't bottleneck.
- A weekly/fortnightly improvement cadence to keep systems current.

Time needed

Task	Time
Create your Systems Register	20–30 min
Map your top 1–3 processes	30–60 min
Write 1–3 SOPs (lightweight)	30–60 min
Set up role clarity (RACI) + handover checklist	20–40 min
Run improvement cadence (ongoing)	10–15 min/week

Start here (do this in order)

- Fill out the Systems Register (Excel) — list all recurring processes that matter.
- Choose ONE high-impact process (sales → quote → job, or job delivery → invoicing).
- Map it using the Process Map template.
- Write 1 SOP for the most error-prone step using the SOP template.

- Clarify ownership using the RACI template.
- Use the Improvement Cadence sheet to review and improve monthly.

Rules for world-class systems

- Make it usable: one page is better than ten pages nobody reads.
- Write for the next person: assume they are smart but new.
- Systems live where work happens: link to files, templates, checklists.
- Review and improve: systems decay unless you maintain them.