

BUSINESS SYSTEM UPGRADE CHECKLIST

Stop patching problems. Start building systems that scale.



1. KEY AREAS TO AUDIT

Check all that apply:

- ☐ We use verbal handoffs for projects or jobs
- ☐ Our sales process lives in someone's head
- ☐ We use email or text to assign tasks
- ☐ Our team doesn't follow a central system
- ☐ I get interrupted for "quick questions" all day
- ☐ There's no real-time dashboard for job status or capacity
- ☐ We've outgrown our current CRM or project tool
- ☐ We have zero documented SOPs
- ☐ Our automations are outdated, clunky, or nonexistent
- ☐ I'm doing way too much myself

If you checked 3 or more, you need a system upgrade ASAP.



2. PRIORITIZE YOUR FIXES

Pick your top 3 priority areas to address this month:

Priority Fix Area	Tool(s) to Support	Who Will Lead This Fix?	Timeline to Complete



3. YOUR UPGRADE ROADMAP

Build your action plan:

Step 1: ___ Document key processes

Step 2: ___ Centralize task tracking (DevStride / ClickUp / Monday)

Step 3: ___ Build dashboards for visibility

Step 4: ___ Set up automations for repeat tasks

Step 5: ___ Train team and assign ownership



SCAN HERE



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