

Simple Management Systems & Checklists

Establishing clear practices and routines is essential to ensure nothing falls through the cracks.



What We're Building Today

Fewer Mistakes

Avoiding critical errors and missed tasks, which can impact customer relationships and financial outcomes.

Less Stress

Moving tasks from mental burden into a trusted, repeatable routine.

More Progress

A simple weekly rhythm promotes consistent business progress.

Practices are not complicated—they're just consistent. The objective today is to establish routines that are reusable week after week.

The Three Building Blocks

Daily + Weekly Routines

Establishing consistent habits helps maintain smooth operations.

Visible Checks

Implementing practices to easily monitor progress and identify gaps.

Quick Actions

Developing rapid responses ensures agility and responsiveness in a business.

Why Startups Feel Chaotic

Missing Structure

Chaos often stems not from a lack of effort, but from the absence of clear structure and practices.

Tasks Not Visible

When tasks are confined to internal thought processes instead of a visible practice, critical details can be missed.

Unaddressed Issues

Every missed task can lead to customer dissatisfaction, financial challenges, and lost opportunities.



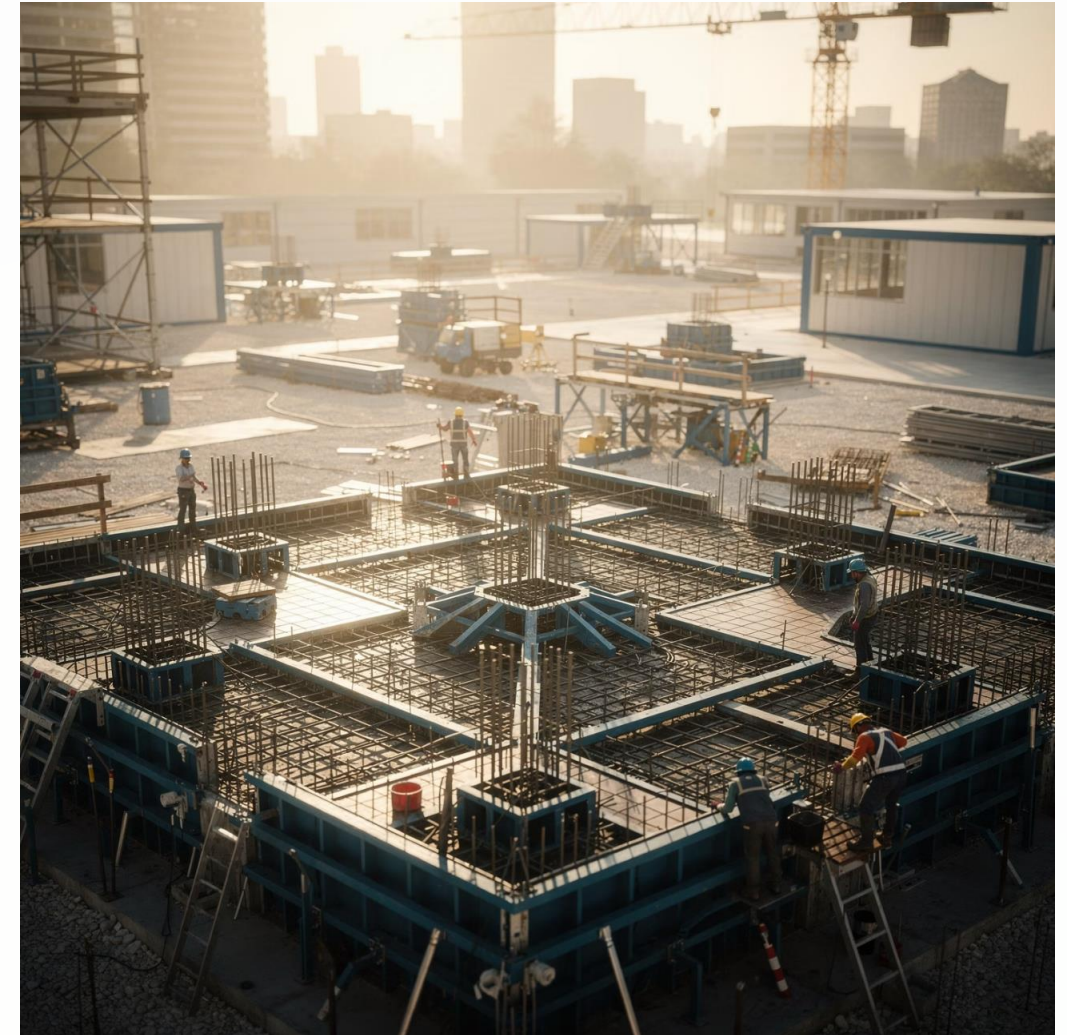
💡 KEY PRINCIPLE

The Rule: Design Before Volume

Doing more does not inherently fix a broken model. If routines are not working effectively at a small scale, adding volume merely amplifies the existing problems.

Establishing routines helps in testing, learning, and adjusting early, preventing over-investment of time or money in an ineffective approach.

Small improvements compound over time. It is crucial to establish sound fundamentals before scaling, which allows for confident expansion.



Delivery That Repeats



Repeatability is the path to profit. When consistent quality is delivered, it reduces errors, saves time, and builds trust.

Checklists reduce errors and rework. Every mistake costs time and money—and damages customer relationships.

Quality = Trust = Referrals. When this is achieved, customers become the best salespeople.

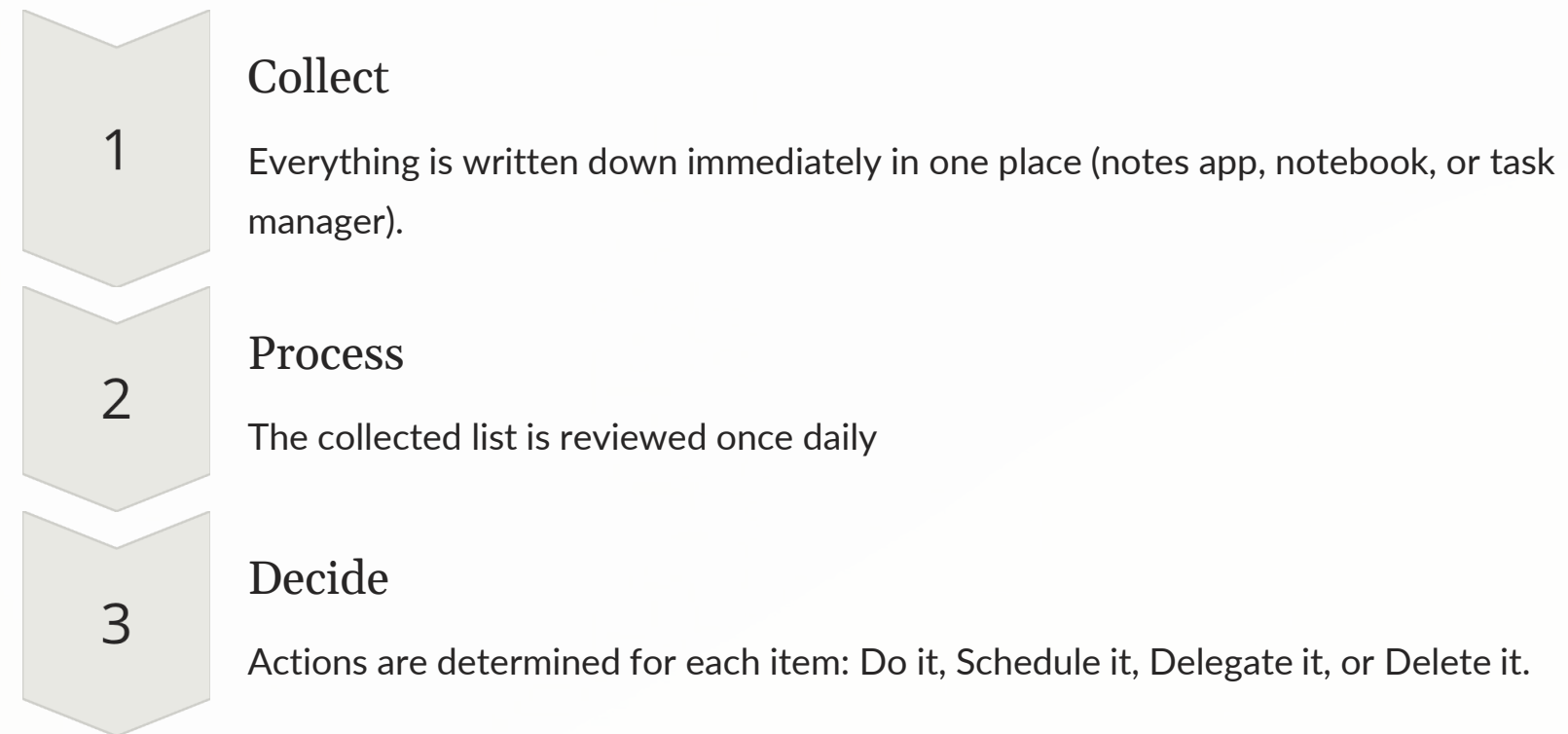
The 5 Routines Every Startup Needs



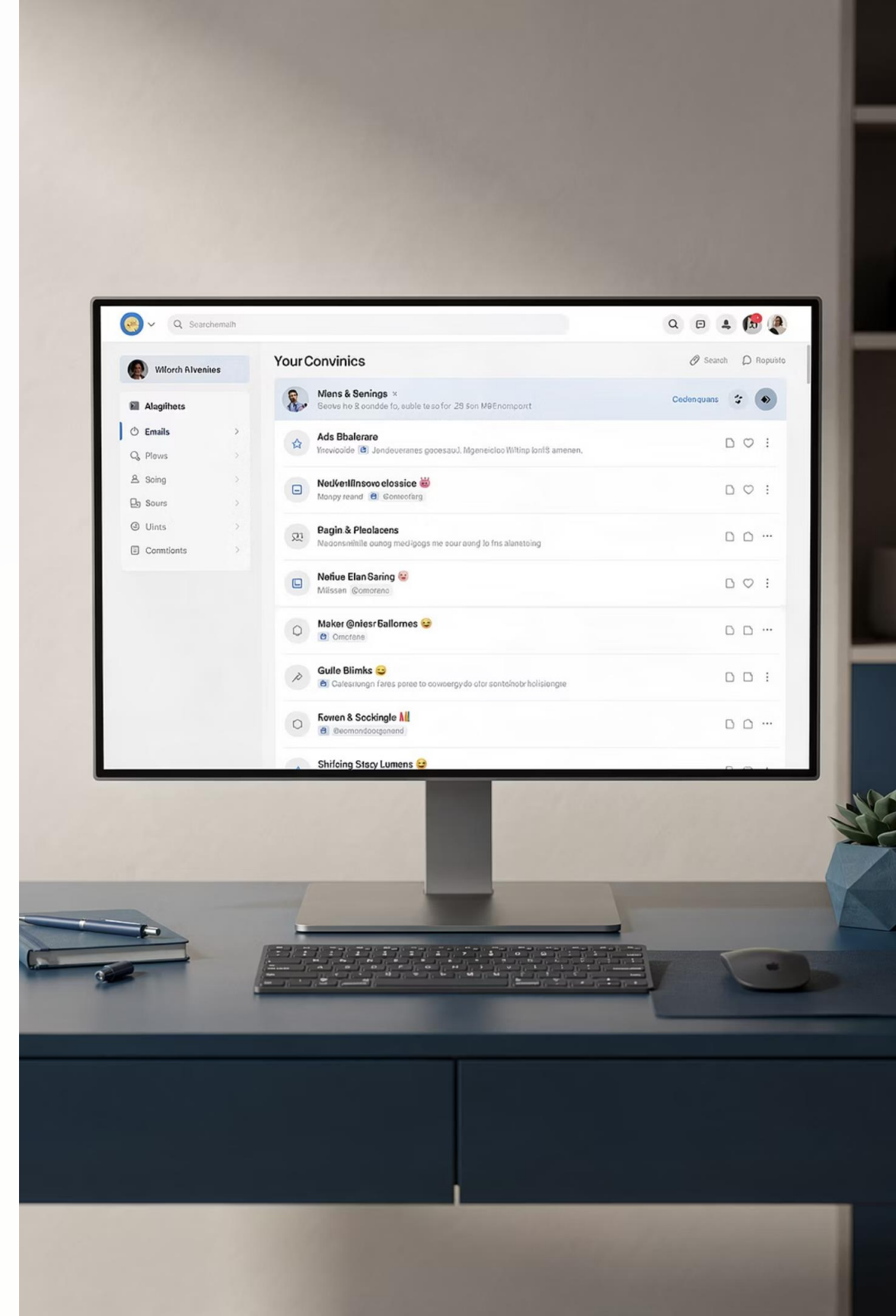
The 'Capture' Inbox

A single place to write down every task, idea, or to-do the moment it pops up. This allows the brain to be free for thinking, not remembering.

How It Works



Practical Example: An individual might quickly jot down 'call bank' in a notes app during a meeting. Later, the item is processed, its time requirement decided and then scheduled for tomorrow morning.



Daily 10-Minute Reset

📌 **Starting each day with this simple routine.** It takes just 10 minutes but helps maintain focus on what actually moves a business forward.

1 Review the Calendar

Today's commitments are reviewed, and the top 3 priorities are selected.

3 One Delivery Action

This includes moving a project forward, completing a quality check, or preparing for upcoming work.

2 One Sales Action

This involves reaching out to a lead, following up on a conversation, or asking for a referral.

4 One Admin/Money Action

Actions such as sending an invoice, paying a bill, or updating financial tracking are completed.

PRACTICE 2

Calendar = The Operating Plan

The calendar is not just for meetings—it's the operating plan. If important work isn't scheduled, it gets crowded out by urgent requests and other people's priorities.

How to Use the Calendar Effectively

- Block time for important work before the week starts
- Treat these blocks like client appointments—non-negotiable
- Schedule recurring blocks at the same time each week (builds habit)
- Protect deep work time—batch meetings to preserve focus blocks

The specific activities to schedule are covered in the other routines (Marketing, Money, Weekly Review, etc.). The key principle: if it matters, it goes on the calendar.





ROUTINE 3: SALES & MARKETING

A Simple Pipeline Board

The pipeline board tracks sales opportunities from first contact to close. Marketing activities (covered in the next card) fill this pipeline with new leads.

1

Maintain Visibility

Paper, whiteboard, Trello—any medium works. The key is to keep it visible, allowing for opportunities to be seen at a glance.

2

Three Simple Columns

Leads → Conversations → Next Step.
Prospects are moved through these stages systematically.

3

The Golden Rule

Every item should have a next-step date.
This prevents orphaned leads from sitting in limbo without a clear plan.

Weekly Marketing Checklist

📌 Utilizing a 60-minute Marketing Block can help in systematically working through this simple starter checklist. Consistency often yields better results than striving for perfection.

- **Choose 2 Channels and Be Consistent**

It is generally advisable to avoid spreading resources too thin. Instead, focus on selecting two channels where target customers are most active and engaging with them regularly.

- **Outreach 5x + Follow Up**

Initiate outreach to five new prospects and ensure follow-up on all open conversations from the previous week.

- **Create Value Content 2x**

Sharing helpful tips, insights, or relevant stories can effectively demonstrate expertise and build trust with the audience.

- **Ask for 1 Referral or Review**

A consistent practice involves asking one satisfied customer each week for a referral or review. This approach can lead to significant compounding benefits over time.

Delivery Checklist: Before, During, After



Before

- Confirm scope and expectations
- Prep materials and tools
- Confirm time and location



During

- Follow established process steps
- Complete quality checks
- Take notes or photos for records



After

- Send invoice immediately
- Follow up within 24 hours
- Ask for review or referral

This simple three-phase checklist ensures nothing falls through the cracks and every customer gets a consistent, professional experience.

PRACTICE 5

Money: Simple, Weekly

Cash Is Oxygen

Weekly checks are vital. A business cannot thrive without a clear understanding of its cash position.

Three Key Numbers

Understanding what is owed, what is due, and projected income for the next 30 days is crucial.

Separate Costs

Distinguishing between the cost of goods sold and overhead is important, as these expenses behave differently.



Fixed vs Variable Overhead

Fixed Costs

These exist even when sales are slow. Rent, insurance, subscriptions, salaries.

Strategy: Maintaining low fixed costs is advisable in the early stages. Each fixed cost represents a monthly commitment.



Variable Costs

These rise and fall with sales volume. Materials, commissions, shipping, transaction fees.

Strategy: Closely monitoring variable costs is important. These costs should ideally remain proportional to revenue as a business grows.



Understanding this difference helps in making smarter decisions about investment and cost reduction.

Key Red Flag Signals

The routines generate data, connects the dots, spots patterns across all five areas and raises red flags when needed

30 MINUTE THE ROUTINES GENERATE DATA. THE CEO REVIEW CONNECTS THE DOTS AND SPOTS PATTERNS ACROSS ALL FIVE AREAS.

📌 Watch for These Red Flags Across All Routines

If any of these appear during the review, stop and address them immediately:

Cash won't cover 2 weeks of expenses → **Action:** Cut costs or accelerate collections NOW

No active sales conversations → **Action:** Reach out to 5 prospects this week

Client communication has gone silent → **Action:** Call them today, don't wait

Missed a delivery deadline → **Action:** Communicate immediately, create recovery plan

Pipeline is empty or stalled → **Action:** Schedule 3 new prospect meetings

Same problems repeating week after week → **Action:** Fix the underlying routine, not just the symptom

Common Mistakes to Avoid

Making It Too Complex

Simple routines are more likely to be adopted, while complex ones often face abandonment. The recommendation is to start with the minimum viable routine.

Installing Everything at Once

Attempting to implement too many changes simultaneously can lead to overwhelm and discontinuation. It is more effective to layer in one routine at a time until it becomes automatic.

Waiting for Perfect

Progress is often more valuable than perfection. The strategy is to start with a foundational practice and refine it incrementally as experience is gained.

Skipping the Weekly Review

The weekly review is a critical step for identifying problems early and continuously improving practices. Consistent review is crucial for long-term effectiveness.

Signs Your Routines Are Working

- **Early Problem Detection**

Issues often surface during the weekly review before they escalate into crises.

- **Preventing Missed Tasks**

Follow-ups happen on time. Invoices are dispatched. Bills are settled.

- **Enhanced Sense of Control**

This leads to less stress, fewer surprises, and greater confidence in operations.

- **Informed Decision-Making**

Visibility into key metrics and the pipeline allows for clear insights into effective strategies.



Key Next Steps

1

Install and Test

Implement the first routine. Perfection is not the initial goal; the focus is on beginning and refining iteratively.

2

Add the Second Routine

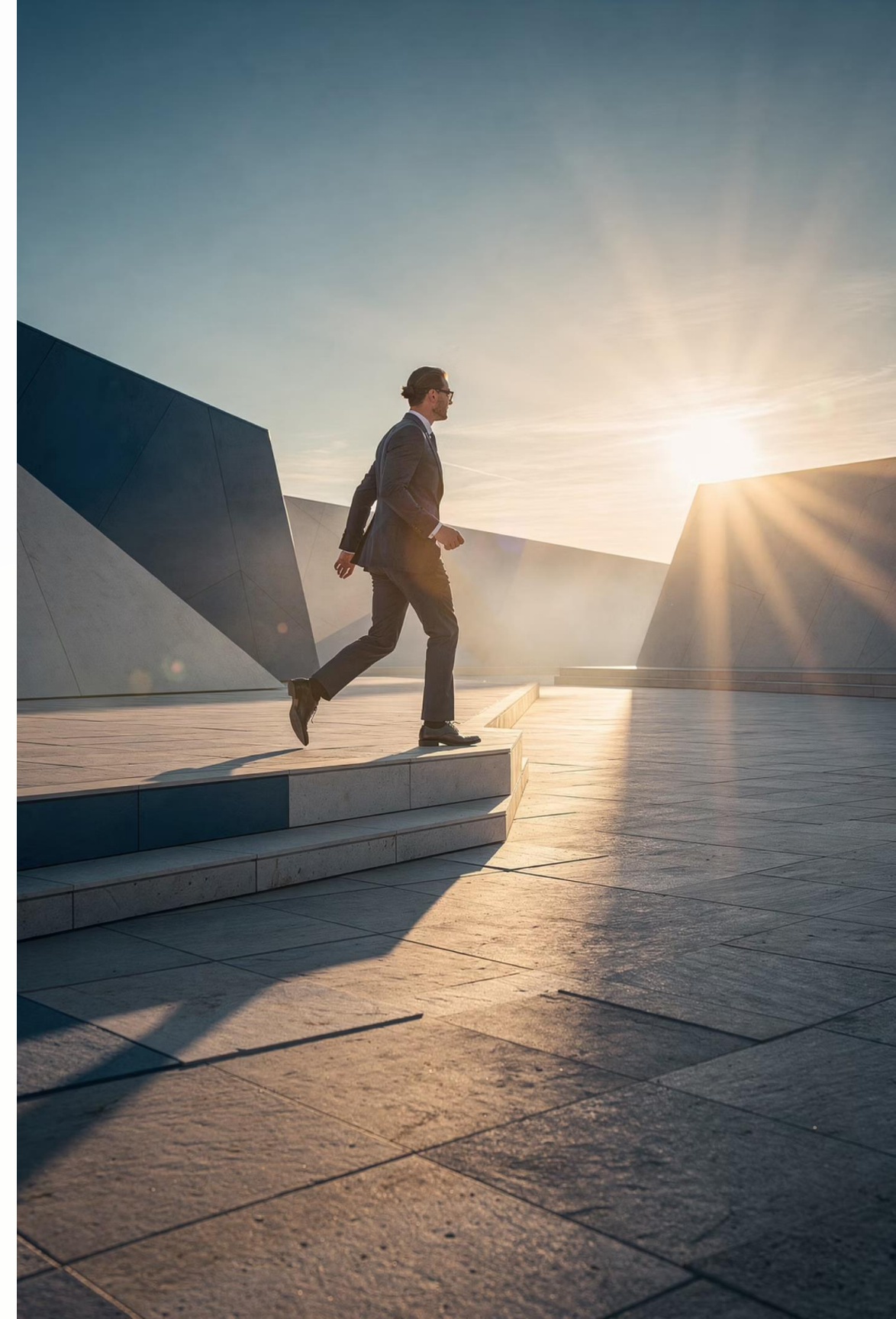
Once the initial routine feels automatic, a second routine can be integrated to build momentum gradually.

3

Refine and Improve

Identify what is working and what requires adjustment, as practices evolve.

📌 **Key Principle:** Consistency beats perfection. Small routines, used regularly, create massive results over time.



Summary: The Power of Routine

Implementing structured routines transforms chaotic startup environments into predictable, scalable systems, fostering growth and stability.



Streamlined Operations

Simple, consistent routines reduce chaos, improve efficiency, and make daily tasks predictable.



Early Problem Detection

Regular checks and reviews help identify issues and red flags before they escalate into crises.



Predictable Growth

Structured sales, marketing, and delivery processes lead to consistent results and scalability.



Financial Clarity

Weekly money reviews provide vital insights into cash flow, costs, and projected income, enabling informed decisions.

Embrace these routines to build a resilient and thriving business, turning potential chaos into controlled progress.

