

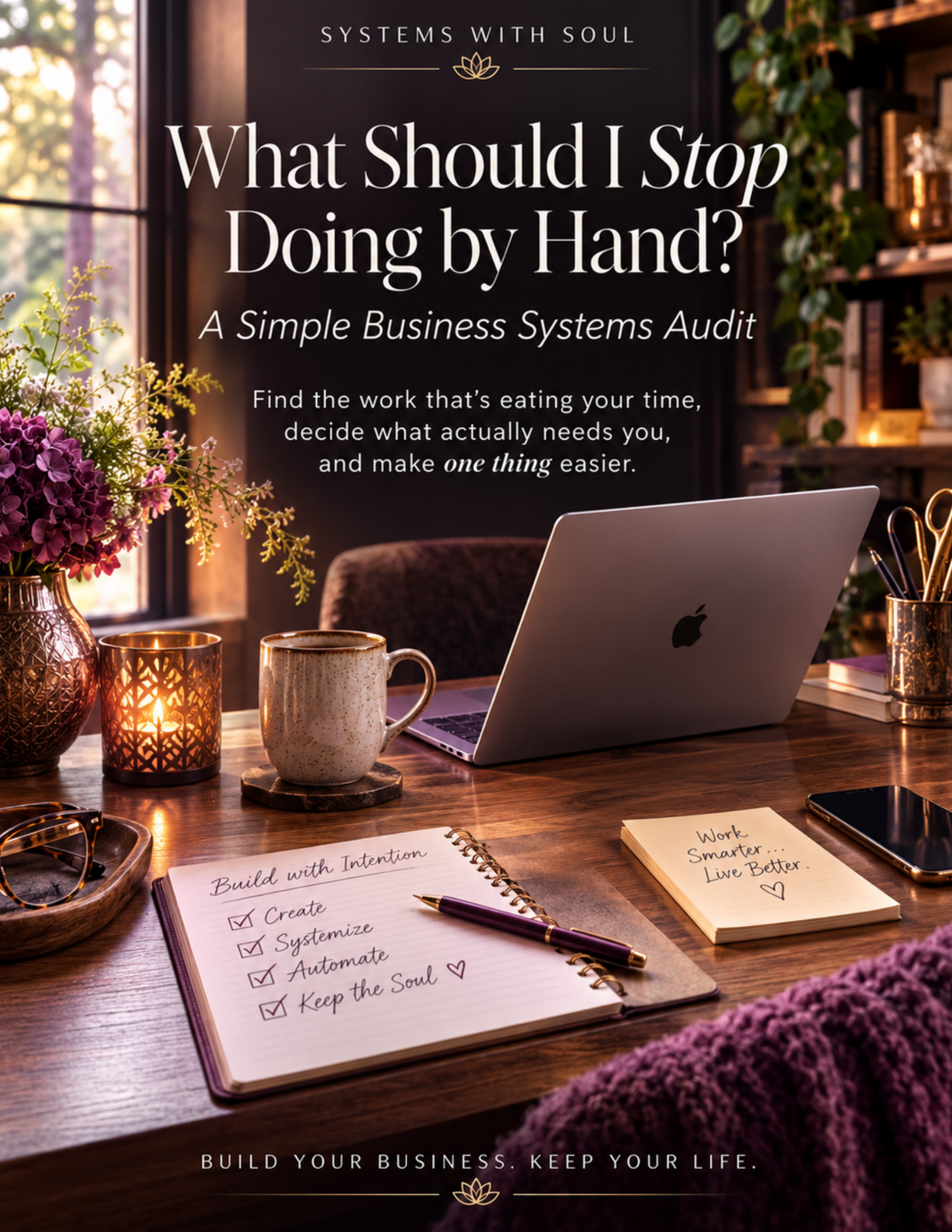
SYSTEMS WITH SOUL



What Should I *Stop* Doing by Hand?

A Simple Business Systems Audit

Find the work that's eating your time,
decide what actually needs you,
and make *one thing* easier.



BUILD YOUR BUSINESS. KEEP YOUR LIFE.



Before You Automate Anything

The goal isn't to automate your whole business.

There are things in your business that should take your time. Your ideas. Your decisions. The way you talk to your customers. The story behind what you create. The parts that depend on your experience, judgment, humor, taste, or actual human connection.

We're not trying to get you out of those.

We're looking for everything surrounding them.

- The caption you rewrite from scratch every time.
- The same information you keep typing into emails.
- The steps you have to remember every time you publish something.
- The task you do every Tuesday that could probably happen without you touching six different buttons.

Those little things don't always look like much on their own. Together, they can quietly eat an afternoon.

That's what this audit is for.

Over the next few pages, you'll look at the work you're already doing and sort it into four buckets:



CREATE

Things you keep starting from scratch.



SYSTEMIZE

Things you repeat that need a reliable way of getting done.



AUTOMATE

Predictable tasks technology could handle for you.



KEEP HUMAN

The work that needs your voice, judgment, creativity, or connection.



Before you begin:

What's one business task that makes you think, "Ugh. I have to do this again?"

That answer is probably worth paying attention to.

CREATE



WHAT ARE YOU CONSTANTLY STARTING FROM SCRATCH?

These are the things that take creativity, thought, or decision each time you do them. They deserve a reusable starting point.

LOOK AT THE WORK YOU DO OFTEN THAT REQUIRES CREATIVITY OR DECISION.

Examples might include:

- ✦ Writing captions, emails, or social posts
- ✦ Designing graphics or Pinterest pins
- ✦ Writing product descriptions or listings
- ✦ Creating presentations or lead magnets
- ✦ Blog posts or video scripts
- ✦ Client onboarding or resource instructions
- ✦ Any content or asset you recreate each time

Your Turn

WHAT DO YOU KEEP STARTING FROM SCRATCH?

List as many as you can think of.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____

WHAT COULD HELP YOU CREATE FASTER?

Templates, swipe files, checklists, outlines, or starting point drafts?

Notes & Ideas



TIP

YOU DON'T NEED TO BE PERFECT.

A rough outline, messy draft, or good-enough template is still a huge time saver.

Think:

If I had a reusable starting point for this, how much time would I get back?
How much mental energy would I save?



SYSTEMIZE + AUTOMATE

WHAT REPEATS OR COULD BE HANDLED WITHOUT YOU?

Some work needs a reliable process.
Some work is predictable enough that technology could take it from here.
Let's surface them.



SYSTEMIZE

What do you repeat?

These are the tasks that follow the same steps over and over. They might not be exciting, but having a simple, reliable way to do them would save you time and mental energy.

LIST THE TASKS YOU REPEAT REGULARLY:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____



Think: what do you do on autopilot, what has a checklist in your head, or what do you dread repeating?



AUTOMATE

What could be handled without you?

These are the predictable, rule-based tasks that happen the same way every time. They don't require your creativity or judgment to get done.

LIST THE TASKS YOU STILL DO MANUALLY:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____



Think: what could a tool, trigger, or automation do the same or better than you?



You don't have to fix everything.

We're not building a perfect, automated unicorn.

We're finding relief.



Small systems.
Smart automation.
More time and energy
for what matters most.

KEEP HUMAN

WHAT SHOULD STAY IN YOUR HANDS?

Not everything should be automated.
There are parts of your business that
need your voice, your judgment,
your creativity, and your connection.

This is the soul part.



WHAT ONLY YOU CAN DO



These are the parts of your business that rely on
your unique experience, intuition, and perspective.
List what belongs here.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

WHAT NEEDS YOUR HUMAN TOUCH



These are the tasks that benefit from your
empathy, creativity, or connection.
List what should stay personal.

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____

WHY DOES THIS NEED TO STAY HUMAN?

Check all that apply.

- ☐ It requires my judgment or experience
- ☐ It needs my voice, story, or perspective
- ☐ It involves empathy or human connection
- ☐ It's creative in a way that's uniquely me
- ☐ It impacts people's trust or experience
- ☐ Other: _____



WHAT HAPPENS IF THIS GETS AUTOMATED?

What would be lost?



*Protect your time.
Protect your energy.
Protect what makes your work, yours.*



REFLECTION

What would you never want technology
or automation to take over?

YOUR ONE *Thing*

YOU DON'T HAVE TO FIX EVERYTHING. JUST ONE THING.

Look back at your audit.

What's taking more time, energy, or brain space than it should?

What would make the biggest difference if it were easier, faster, or automated?



1

CHOOSE YOUR ONE THING

What's the task taking more from you than it should?

2

WHY THIS ONE?

What would change if this were easier, faster, or automated?

3

HOW COULD IT BE EASIER?

What's one way this could be simplified, systemized, or automated?

4

YOUR FIRST SMALL STEP

What's one tiny action you can take this week to move this forward?



Remember

You found the friction.
Now let's make it easier.

Small systems. Simple automation.
More time for the work (and life)
you actually care about.



YOUR AUDIT SUMMARY

A quick glance back at what you discovered.



CREATE

Things I keep
starting from
scratch.

items



SYSTEMIZE

Things I repeat
that need a
reliable system.

items



AUTOMATE

Things I still do
manually that a tool
could handle.

items



KEEP HUMAN

Things that need
my voice, judgment,
or connection.

items



You did the hard part. Awareness is power.

Keep this. Revisit it. Adjust as you grow.
Your systems should grow with you.



*Build your business.
Keep your life.*

