BP OUTSOURCE 365 / FREE BUSINESS RESOURCE

THE BUSINESS EFFICIENCY TOOLKIT

Audit your operations. Reclaim your time. Build a smarter workflow.

A practical workbook for business owners who want to identify bottlenecks, reduce repetitive work, and decide what to delegate or automate.

INSIDE: Operations self-audit | Outsource vs. automate guide | Time & cost calculator | 30-day action plan

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01 | Business operations self-audit

Check each statement that describes your business today. Every unchecked item is an opportunity to improve.

Administrative workflow

■ Our recurring tasks have clear owners and documented steps.

■ Appointments, calendars, and deadlines are tracked centrally.

■ Files and client information are organized and easy to locate.

Client experience

■ New inquiries receive a timely response.

■ Client onboarding follows a consistent checklist.

■ Follow-ups do not depend on someone remembering to send them.

Finance and reporting

■ Invoices are issued promptly and tracked through payment.

■ We can see outstanding work and key metrics in one place.

Technology and team

■ We use tools that integrate instead of duplicating data entry.

■ Team members know what is due, when, and who is responsible.

Reflection: Which three unchecked statements cause the most friction?

1. _____

2. _____

3. _____

02 | Outsource or automate?

Use this quick decision guide to select the right solution for each task.

TASK CHARACTERISTIC	BEST FIRST MOVE
Repetitive, rules-based, predictable	Automate
Requires judgment, communication or empathy	Delegate to a trained assistant
Repetitive but requires human review	Combine automation + assistant
High-risk, regulated or strategic	Keep qualified oversight

Common opportunities

- Inbox triage, appointment coordination and calendar updates
- Lead tracking, CRM updates and follow-up reminders
- Client intake forms and onboarding workflows
- Invoice preparation, payment reminders and reporting
- Vendor coordination, document organization and task tracking

My top three opportunities:

Task _____ Approach _____

Task _____ Approach _____

Task _____ Approach _____

03 | What is admin work costing you?

Estimate the opportunity cost of recurring administrative work. This is a planning tool, not a guaranteed savings forecast.

Step 1 — Estimate your time

Hours spent on repeat admin tasks per week: _____ hours

Estimated value of your time per hour: $ _____

Step 2 — Calculate your monthly opportunity cost

Weekly hours × hourly value × 4.33 = estimated monthly value

_____ × $ _____ × 4.33 = $ _____ per month

Step 3 — Compare solutions

Estimated monthly cost of delegated support or tools: $ _____

Estimated hours you could redirect to higher-value work: _____

Example: 8 hours/week × $75/hour × 4.33 = approximately $2,598/month in owner time. Actual financial benefit depends on the tasks, quality, costs, and how recovered time is used.

Your next step

Choose one task you can remove from your plate within the next 7 days:

_____

04 | Ten tasks to stop doing yourself

You do not have to delegate all ten. Start with the tasks that are frequent, teachable, and easy to measure.

■ Scheduling meetings and sending reminders

■ Sorting shared inboxes and routing inquiries

■ Updating contact records and CRM notes

■ Following up on leads and proposals

■ Preparing routine reports and dashboards

■ Organizing digital files and templates

■ Coordinating vendors and service appointments

■ Preparing invoices and tracking receivables

■ Maintaining project trackers and deadlines

■ Building standard onboarding and intake workflows

A simple delegation brief

Task: _____

Desired outcome: _____

Tools/access needed: _____

Frequency: _____

Quality check / approval owner: _____

05 | Your 30-day efficiency plan

WEEK 1 • Identify

List recurring tasks, estimate hours, and select the top two bottlenecks.

My action: _____

WEEK 2 • Simplify

Document steps, remove unnecessary approvals, and create one reusable checklist.

My action: _____

WEEK 3 • Implement

Delegate or automate one workflow. Set clear owners, access permissions, and a review process.

My action: _____

WEEK 4 • Measure

Compare turnaround time, errors, hours spent, and client response speed. Adjust the workflow.

My action: _____

READY TO RECLAIM YOUR TIME?

BP Outsource 365 helps businesses streamline back-office operations, administrative support, client intake, lead follow-up, and workflow automation.

Book a free 15-minute business operations consultation.

bpoutsource365.com

This workbook is for general operational planning and does not constitute legal, tax, or financial advice.