

ATOMIC AGENTS | MINI SYSTEMS TOOLKIT

Build Your Systems

Work Smarter. Repeat What Works.

Today isn't about systemizing your entire business. It's about finding the places where a little structure can save you time, reduce mistakes, and make the client experience more consistent.

ACTIVITY 1 | WHAT'S ALREADY ON REPEAT?

Systems Are Already Happening

Think about the tasks you perform repeatedly in your business. Some probably work beautifully. Others may depend heavily on memory, time, or sheer determination.

What are five things you do over and over?

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

Now mark each one:

S = I have a reliable system **H** = Mostly lives in my head **R** = I recreate it every time **?** = I'm not entirely sure what happens

Something that already works well:

Something I would LOVE to stop figuring out repeatedly:

ACTIVITY 2 | THE FRICTION AUDIT

Where Does Your Business Make You Stop?

Complete whichever statements immediately bring something to mind.

I repeatedly forget to:

I repeatedly recreate:

I repeatedly search for:

Clients repeatedly ask me:

I repeatedly enter or copy:

I repeatedly have to fix:

I regularly think, "I need to remember to..."

Something only happens because I personally remember to do it:

Circle Your Top Three

Which three create the greatest combination of **time + frustration + risk**?

1. _____
2. _____
3. _____

★ THE ONE I'M WORKING ON TODAY:



ACTIVITY 3 | MAP THE PROCESS

Trigger → Steps → Finish Line

Don't worry about making it perfect. Write down how the process actually works **right now**.

TRIGGER

This process begins when:

STEPS

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

FINISH LINE

I know this process is complete when:

THEN WHAT?

After this process, the person/task/project moves to:

Now Look Again

Is there a step I can:

- ☐ **ELIMINATE** — It doesn't need to happen
 - ☐ **SIMPLIFY** — There's an easier way
 - ☐ **TEMPLATE** — I'm recreating something
 - ☐ **DELEGATE** — Someone else could own it
 - ☐ **AUTOMATE** — Technology could handle it
 - ☐ **DOCUMENT** — It needs clearer instructions
-

ACTIVITY 4 | GIVE THE INFORMATION A HOME

Build Your Single Source of Truth

Whether you use a CRM, spreadsheet, project-management tool, or industry-specific software, decide what information you need to reliably capture.

My Minimum Client Record

- ☐ Name
- ☐ Phone
- ☐ Email
- ☐ Lead/source
- ☐ Client need or goal
- ☐ Current stage/status
- ☐ Date of last contact
- ☐ Next step
- ☐ Next contact date
- ☐ Important notes
- ☐ _____
- ☐ _____

Where does this information currently live?

- ☐ CRM
- ☐ Google Sheet
- ☐ Phone
- ☐ Email
- ☐ Notebook
- ☐ Calendar
- ☐ Several of these
- ☐ Other: _____

My primary source of truth will be:

QUICK PIPELINE CHECK

Can I open my system right now and quickly identify:

- ☐ Who needs attention today?
- ☐ Who needs follow-up this week?
- ☐ Who has no next step?
- ☐ Where each lead came from?
- ☐ Which opportunities are active?
- ☐ Which clients have gone quiet?
- ☐ Who should move into long-term follow-up?

The biggest improvement I need to make to my client-management system is:

ACTIVITY 5 | BUILD AN SOP

Get It Out of Your Head

Choose one repeatable process. It can be the process you've already been working on or another simple task.

ONE-PAGE SOP

SOP NAME:

PURPOSE

Why does this process exist?

TRIGGER

When does it begin?

OWNER

Who is responsible?

STEPS

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

TOOLS & RESOURCES

Links, forms, templates, software, documents, contact information, etc.

COMPLETION STANDARD

How do we know this was completed correctly?

EXCEPTIONS

What situations require a different process, additional approval, or human judgment?

AI SHORTCUT

Try giving AI:

I regularly complete the following task: [TASK]. Here are the steps I currently take: [STEPS]. Organize this into a simple one-page Standard Operating Procedure including the purpose, trigger, owner, steps, tools/resources, completion standard, and exceptions. Do not add steps I haven't provided; flag anything that needs clarification.

Then **review it yourself**. AI can organize your process. It shouldn't decide what your process is.

ACTIVITY 6 | STOP RECREATING IT

Build Your Reusable Resource Library

What could become a reusable tool?

I repeatedly...	Could become a...
Send the same information	Email/template
Explain the same thing	FAQ/guide/video
Ask the same questions	Intake form
Perform the same steps	Checklist
Create similar documents	Template
Schedule the same tasks	Recurring task
Give the same instructions	SOP/resource

My Template Wish List

I need a template for:

I need a checklist for:

I need a form for:

I need a reusable email/text for:

I need a client resource for:

Give Them a Home

My reusable resources will live in:

My naming system will be:

ACTIVITY 7 | BUILD YOUR NEW INQUIRY FUNNEL

What Happens After Hello?

This is the big one. A new inquiry just arrived.

Where could it come from?

- ☐ Website
- ☐ Phone
- ☐ Email
- ☐ Text

- ☐ Social media
- ☐ Referral
- ☐ Event/networking
- ☐ Advertising
- ☐ Walk-in
- ☐ Other: _____

Now build **ONE consistent path**.

INQUIRY

Someone contacts me.

↓

1 | ACKNOWLEDGE

How quickly should they know their inquiry was received?

Could this portion be automated? **YES / NO**

↓

2 | CAPTURE

What information do I immediately collect?

Where does it go?

↓

3 | QUALIFY

What do I need to know to determine how I can help?

↓

4 | CONNECT

What personal contact happens?

- ☐ Phone
- ☐ Text
- ☐ Email
- ☐ Video
- ☐ Appointment
- ☐ Other: _____

↓

5 | NEXT STEP

What action do I want them to take?

↓

6 | FOLLOW-UP

If they aren't ready today:

Follow up in: _____

Then: _____

Then: _____

WHERE DO THEY GO?

Ready now → _____

Not ready yet → _____

Not responding → _____

Not a fit → _____

Referral opportunity → _____

THE BIG QUESTION

At what point in my current inquiry process am I most likely to lose someone?

ACTIVITY 8 | AUTOMATION PLANNER

When THIS Happens → Do THIS

Look back at the system you've been building.

Which steps require **you**, and which simply require something to happen?

Automation #1

WHEN THIS HAPPENS:

AUTOMATICALLY DO THIS:

THEN DO THIS:

A HUMAN STEPS IN HERE:

Automation #2

WHEN THIS HAPPENS:

AUTOMATICALLY DO THIS:

THEN DO THIS:

A HUMAN STEPS IN HERE:

Keep It Human

I should **NOT** automate:

Because:

REMEMBER:

Automate the repetition. Keep the relationship human.

ACTIVITY 9 | SYSTEMS AUDIT

How Is Your Business Actually Running?

Don't build everything today. Identify what needs attention.

Business System	Working	Messy	Missing
Marketing	☐	☐	☐
New inquiries/leads	☐	☐	☐
Client database/CRM	☐	☐	☐
Client onboarding	☐	☐	☐
Client communication	☐	☐	☐
Service/project delivery	☐	☐	☐
Scheduling/calendar	☐	☐	☐

Financial/bookkeeping	☐	☐	☐
Documents/records	☐	☐	☐
Follow-up	☐	☐	☐
Past-client care	☐	☐	☐
Marketing/content	☐	☐	☐
Other: _____	☐	☐	☐

PRIORITIZE

Highest risk if it fails:

Creates the most frustration:

Would save me the most time:

Would improve my client experience the most:

★ My next system to build:

ACTIVITY 10 | SYSTEMIZE IT

Your 30-Day Systems Plan

Don't leave today's Zoom meeting thinking, *Wow, I really need better systems.*

Choose what happens next.

WITHIN 24 HOURS

I will:

WITHIN 7 DAYS

I will build/document:

WITHIN 30 DAYS

I will improve or automate:

MY SYSTEM-BUILDING FORMULA

FIND THE FRICTION



MAP THE PROCESS



GIVE THE INFORMATION A HOME



DOCUMENT THE STEPS



CREATE REUSABLE TOOLS



AUTOMATE WHAT MAKES SENSE



TEST + IMPROVE

FINAL QUESTION

If my business stopped depending on me remembering everything, what would become easier?

ATOMIC TAKEAWAY

A system isn't something else you have to do.

It's how you stop having to figure out what to do.