

AMBER MESCUE

HOW TO CLONE YOURSELF

BUSINESS ACTIVITY INVENTORY

Leverage this worksheet as an inventory for possible activities you may want to consider for your business as you systematize, get efficient, outsource, and delight clients. Leverage this activity to brainstorm and add activities to your Get Efficient Worksheet.

CATEGORY	ACTIVITY
MARKETING	<ul style="list-style-type: none">• Social media• FB ads• Web design• Copywriting• SEO• Newsletter• Set up webinars
SALES	<ul style="list-style-type: none">• Sales page• Sales plan• Sales follow-up• Update CRM system• Service agreement signed
FINANCIALS	<ul style="list-style-type: none">• Send invoices• Manage the books• Track expenses• Budget• Budget VS. Actuals• Payroll/paying team
TECH	<ul style="list-style-type: none">• Backup files• Security

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CATEGORY	ACTIVITY
CLIENT SERVICES	<ul style="list-style-type: none">• Customer service• Standard responses• Delivering products• Send welcome process• Prepping for meetings
OPERATIONS	<ul style="list-style-type: none">• Posting blogs• Email management• Operations manual• File management• Backing up files