

THE SMALL BUSINESS SYSTEMS SELF-ASSESSMENT

Find your biggest systems gaps in 15 minutes

This guide will help you identify where your business is losing time, money, and customers due to manual processes and underutilised technology. You'll walk away with a clear picture of your priorities—plus 10 quick wins you can implement yourself, today.

WHAT'S INSIDE THIS GUIDE

- ✓ 20-question self-assessment across 5 key areas
- ✓ Scoring system to identify your priorities
- ✓ 10 quick wins you can implement immediately
- ✓ Recommended tools for each problem area
- ✓ Typical cost ranges to help you budget

From **SmallBiz Systems**

Brisbane-based systems implementation for small businesses
www.smallbizsystems.com.au

Before You Start

Most small business owners know they should be "more digital" but don't know where to start. The tech world throws buzzwords at you—automation, CRM, cloud, AI—without explaining what actually matters for a business your size.

This assessment cuts through the noise. It focuses on five practical areas where small businesses typically lose the most time and money:

- 1. Customer Management & Communication**
- 2. Financial Operations & Invoicing**
- 3. Internal Processes & Documentation**
- 4. Online Presence & Customer Experience**
- 5. Reporting & Decision Making**

How to use this assessment: For each question, score yourself from 1-5. Be honest—this is for your eyes only. At the end, you'll add up your scores to see which areas need the most attention.

SCORING KEY

1 = Not at all / Never

4 = Mostly / Usually

2 = Rarely / Poorly

5 = Completely / Always

3 = Sometimes / Partially

Section 1: Customer Management & Communication

How well do you track customer information, follow up on leads, and maintain relationships? This is often the biggest gap for service-based businesses.

Q1. All customer contact information is stored in one central place (not scattered across email, phone contacts, spreadsheets, and sticky notes).

Score (1-5): _____

Q2. When a customer calls, anyone in the business can quickly see their history—past purchases, conversations, and any outstanding issues.

Score (1-5): _____

Q3. Leads and enquiries are tracked systematically so nothing falls through the cracks.

Score (1-5): _____

Q4. We have automated follow-up sequences (e.g., welcome emails, check-in messages, review requests) rather than relying on memory.

Score (1-5): _____

Section 1 Total: _____ / 20

Section 2: Financial Operations & Invoicing

Cash flow is the lifeblood of small business. How automated is your invoicing, payment collection, and reconciliation?

Q5. Invoices are generated and sent within 24 hours of completing work (not manually typed days or weeks later).

Score (1-5): _____

Q6. Customers can pay online via credit card or direct debit, not just bank transfer.

Score (1-5): _____

Q7. Bank transactions are automatically imported into our accounting software with rules that match most payments automatically.

Score (1-5): _____

Q8. We have automated reminders for overdue invoices rather than manually chasing late payments.

Score (1-5): _____

Section 2 Total: _____ / 20

Section 3: Internal Processes & Documentation

Do you have documented processes that let anyone in the business do a task consistently? Or does everything live in one person's head?

Q9. Key business processes are documented so a new team member could follow them without extensive hand-holding.

Score (1-5): _____

Q10. We use task management or project management software to track what needs doing, who's doing it, and when it's due.

Score (1-5): _____

Q11. Documents and files are stored in a shared, organised system (not local hard drives or personal email).

Score (1-5): _____

Q12. We use templates for common documents (quotes, proposals, contracts, emails) rather than starting from scratch each time.

Score (1-5): _____

Section 3 Total: _____ / 20

Section 4: Online Presence & Customer Experience

Your customers now expect digital convenience. Can they book, pay, and communicate with you easily—or do they have to call during business hours?

Q13. Customers can book appointments or request quotes online, 24/7, without calling or emailing.

Score (1-5): _____

Q14. Our Google Business Profile is claimed, complete, and regularly updated with photos and posts.

Score (1-5): _____

Q15. We actively request and receive online reviews after completing work.

Score (1-5): _____

Q16. Our website clearly shows what we do, who we serve, and how to take the next step (not a brochure from 2015).

Score (1-5): _____

Section 4 Total: _____ / 20

Section 5: Reporting & Decision Making

Do you know your numbers? Can you see what's working and what isn't—without spending hours in spreadsheets?

Q17. I can see my current cash position, outstanding invoices, and upcoming bills at a glance (without logging into multiple systems).

Score (1-5): _____

Q18. I know which products/services are most profitable and which customers are worth the most.

Score (1-5): _____

Q19. I track key metrics (leads, conversions, average job value) regularly, not just at tax time.

Score (1-5): _____

Q20. I spend less than 2 hours per week on financial admin and reporting.

Score (1-5): _____

Section 5 Total: _____ / 20

Your Total Scores

Section	Your Score	Max Score
1. Customer Management & Communication		20
2. Financial Operations & Invoicing		20
3. Internal Processes & Documentation		20
4. Online Presence & Customer Experience		20
5. Reporting & Decision Making		20
OVERALL TOTAL		100

What Your Score Means

80-100: You're ahead of most small businesses. Focus on optimisation and staying current.

60-79: Solid foundation with clear opportunities. A Systems Health Check would identify quick wins.

40-59: Significant gaps that are likely costing you time and money. Prioritise your lowest-scoring section.

Under 40: You're at risk of falling behind competitors. Start with the basics in Section 2 (Financial) and Section 4 (Online Presence).

10 Quick Wins You Can Implement Today

You don't need a consultant for everything. Here are 10 things you can do yourself, right now, for free or very low cost:

1. Claim your Google Business Profile

If you haven't already, go to business.google.com and claim your listing. Add photos, business hours, and services. This is free and takes 15 minutes.

Cost: Free

2. Set up bank feed auto-matching rules

In MYOB or Xero, go to Bank Feeds settings and create rules for your regular transactions (rent, subscriptions, utilities). Once set, these match automatically forever.

Cost: Free (you already pay for the software)

3. Create an automated review request

Use Google Forms (free) or a tool like NiceJob (\$75/month) to automatically email customers after a job asking for a Google review. Include a direct link.

Cost: Free - \$75/month

4. Enable online payments on invoices

Both MYOB and Xero allow you to add PayPal, Stripe, or direct debit to invoices. Customers can pay in one click. Activation is usually free; transaction fees apply.

Cost: Free to enable; ~2% per transaction

5. Set up automated invoice reminders

In your accounting software, enable automatic reminders at 7, 14, and 30 days overdue. Write them once, they run forever.

Cost: Free

6. Create a simple booking link with Calendly

The free tier lets customers book 15-minute calls directly into your calendar. No more email ping-pong. Takes 10 minutes to set up.

Cost: Free for basic; \$10/month for more features

7. Move your documents to Google Drive or Dropbox

Pick ONE place for all business documents. Create a simple folder structure (Clients, Admin, Templates, Archive). Migrate everything there.

Cost: Free for basic storage

8. Create three email templates

Write a template for: (1) New enquiry response, (2) Quote follow-up, (3) Job completion thank you. Save them in your email as templates.

Cost: Free

9. Set up a simple Profit & Loss dashboard

MYOB and Xero both have built-in dashboards. Customise it to show: This month's sales, Outstanding invoices, Bank balance. Check it weekly.

Cost: Free

10. Enable two-factor authentication everywhere

Add 2FA to your email, accounting software, and bank. This protects you from the #1 cyber threat to small business: email compromise.

Cost: Free

Recommended Tools by Category

If you scored low in a particular section, here are proven tools that Brisbane small businesses are using successfully. All are marketplace SaaS products—no custom development required.

Customer Management (CRM)

- **HubSpot CRM** — Free for basic features. Best for businesses wanting marketing automation too. ~\$0-\$50/month
- **Pipedrive** — Simple, visual sales pipeline. Great for service businesses. ~\$15-30/user/month
- **Jobber / ServiceM8** — Built for trades and field services. Includes scheduling, invoicing. ~\$50-100/month

Financial Operations

- **MYOB Business** — The Australian standard. Best for businesses needing payroll. ~\$50-100/month
- **Xero** — Modern interface, excellent app ecosystem. ~\$30-70/month
- **Stripe / Square** — Online payment processing. ~2.9% per transaction

Internal Processes & Projects

- **Asana** — Task and project management. Free for small teams. ~\$0-15/user/month
- **Notion** — Documentation, wikis, and databases. Very flexible. ~\$0-10/user/month
- **Google Workspace** — Email, Drive, Docs, Sheets. The basics done well. ~\$9/user/month

Online Presence & Booking

- **Calendly** — Online booking for calls and meetings. ~\$0-12/month
- **NiceJob** — Automated review requests and reputation management. ~\$75/month
- **Canva** — Create social media graphics, flyers, proposals. ~\$0-18/month

Ready for the Next Step?

If you've identified gaps but aren't sure how to fix them—or you simply don't have time to do it yourself—I can help.

[Free 15-Minute Assessment Call](#)

Book a call and we'll discuss your lowest-scoring areas. I'll tell you honestly whether you need professional help or can handle it yourself. No sales pitch, no obligation.

BOOK YOUR FREE CALL

■ hello@smallbizsystems.com.au

■ 0400 000 000

■ www.smallbizsystems.com.au

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