

5 WAYS YOU KNOW YOUR BUSINESS HAS OUTGROWN YOUR SYSTEMS

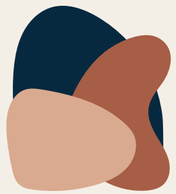
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If you've taken the time to download this, you likely already know the answer to your own question. However, in case there is a modicum of doubt, we're going to jump right into it.

McKinsey research found employees spend 1.8 hours a day, nearly a full workday every week, just searching for information they need to do their job. This tells you exactly where that's happening in your business. (McKinsey Global Institute, "The Social Economy")

That's a full day, every week, gone before the real work even starts. Imagine what you could do with that time back. We can see it for you, and it's pretty amazing.

Here's the good news. Your operational issues can be fixed. We're here to help, starting with these 5 checkpoints.



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1) “LET ME SEND YOU A LOOM.” EVERYTHING LIVES IN YOUR HEAD.

If it’s not written down, it’s not a process, it’s a cute little thing you memorized. You shouldn’t have to send a video every time someone asks you a question, and no one should have to watch a video every time they have one. You need an SOP for everything.

Repeat after us: “There’s an SOP for that.”

Practical Steps:

- List out every process you run in your business.
- Determine whether each one is written down anywhere, or if it only lives in your head.
- If it lives in your head, get it out. Record yourself walking through it, feed the recording to Claude (or your most ethically chosen AI software), and let it draft the SOP.
- Check the file for accuracy; yes, AI can make mistakes.
- Title it properly and store it in an SOP folder on your shared internal drive.

2) "HOW DO WE CROSS THE STREAMS?" NO ONE IS UTILIZING YOUR PROJECT MANAGEMENT SYSTEM.

Remember, in Ghost Busters, when the rule was to not cross the streams? But in the end - they had to - it was unavoidable. They had to re-invent their process - even if it upended what they already knew.

The first question to ask is why. There has to be a reason no one's using it, and your team will tell you, if you ask. They'll either have a good reason (or they won't). If they have a good reason, you need to listen to them and figure out how to fix the problem. In our experience, people have not been given the right tools, resources, and understanding to truly utilize the system.

That starts with you as the founder. We've been handed over sticky notes, Notes App screenshots, and even voice recordings that exist outside the project management system that are complicating the workflow. You can't expect your team to ask you for these notes - they're expecting them in the system you set up.

Practical Steps:

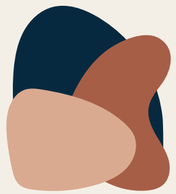
- Ask yourself honestly: are you using the system you set up for your business?
- Ask your team why they aren't using the system? Take notes.
- Implement changes based on what they tell you.
- Figure out what everyone's processing style is.
- Figure out how to get those styles translated into the system.

3) "WHERE'S MY FILE?" NO ONE ON YOUR TEAM CAN FIND YOUR ASSETS.

We get it — assets end up saved in 15 different places. When you've been wearing every hat, it's easy to pick one up and set another down, and what's left behind is a messy filing system. New team members can't get access, and finding anything is damn near impossible.

Practical Steps:

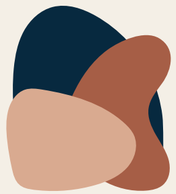
- List everything your team needs access to.
- Decide on one standard, shared space to store assets.
- Create one standard naming and filing convention.
- Bring in an administrative assistant to move everything into its proper place.
- Train your team on where and how to file going forward.



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4) "I'M EXHAUSTED." OVERWORKING AND RUSHING TO MEET DEADLINES

Simone Biles worked overtime and has the gold medals to prove it. That's an incredible level of dedication, and it's just not realistic for the rest of us, so no hard feelings. If you're rushing to meet every deadline, or feel like you're always playing catch-up, the fix isn't working harder. It's working smarter. You've got a systems issue, and the good news is, systems issues are fixable.



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Working 40+ hours a week doesn’t automatically mean you’re getting more done, it usually means there’s room to work differently. If you’re constantly in the weeds and still behind, that’s a sign your business is ready for a better operational rhythm, not a sign you need to push harder. It’s possible you need more people. More likely, you need to step out of the day-to-day so your business can run without you in every corner of it.

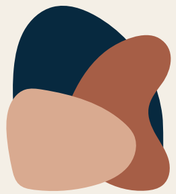
Practical Steps:

- Track your own hours for one week and note where you’re doing work that isn’t truly yours to own.
- Make a list of everything only you can approve or touch right now, then ask why.
- Pick one recurring task this week and hand it off completely, no check-ins, no hovering.
- If you're too close to see the pattern, this is where an unbiased outside audit helps: someone to show you where you're the bottleneck, what can be automated, and what's truly yours to own. (This is exactly what we do.)

5) “WAIT, WHAT DID WE MAKE LAST MONTH?” YOU’RE MAKING DECISIONS WITHOUT DATA.

When you're caught up in the day to day, it's easy to forget to look at the numbers that actually matter. If you aren't looking at hard data to make your decisions, you're playing fast and loose with the reality of your business. The financials and the pipeline matter — without those, you don't have a business at all.

Gut instinct got you this far, and that's worth honoring. But gut instinct without data is just a guess, and guesses get more expensive as your business grows. You need to know your numbers and you need a system to make sure you’re tracking them on a regular basis.



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Operationally, this isn't a solo job, your entire leadership team needs to be focused on the numbers that matter, with a system for reviewing them and connecting their own work back to those numbers. Your CPA needs access too, not just at tax time. A tool like Fathom can help build that system: it lets you choose which numbers matter, gives your leadership a simple way to input their data each month, and turns all of it into forecasting and projections for you can actually use

Practical Steps:

- Decide on 3-5 numbers that matter for your business right now.
- Determine where each currently lives.
- Set up one simple, shared dashboard or a report that pulls them together (or use a software like Fathom if you want something more automated).
- Loop in your leadership team and your CPA so everyone's watching the same numbers, not their own version.
- Put a recurring 15-minute check-in on the calendar, weekly, to actually look at them.

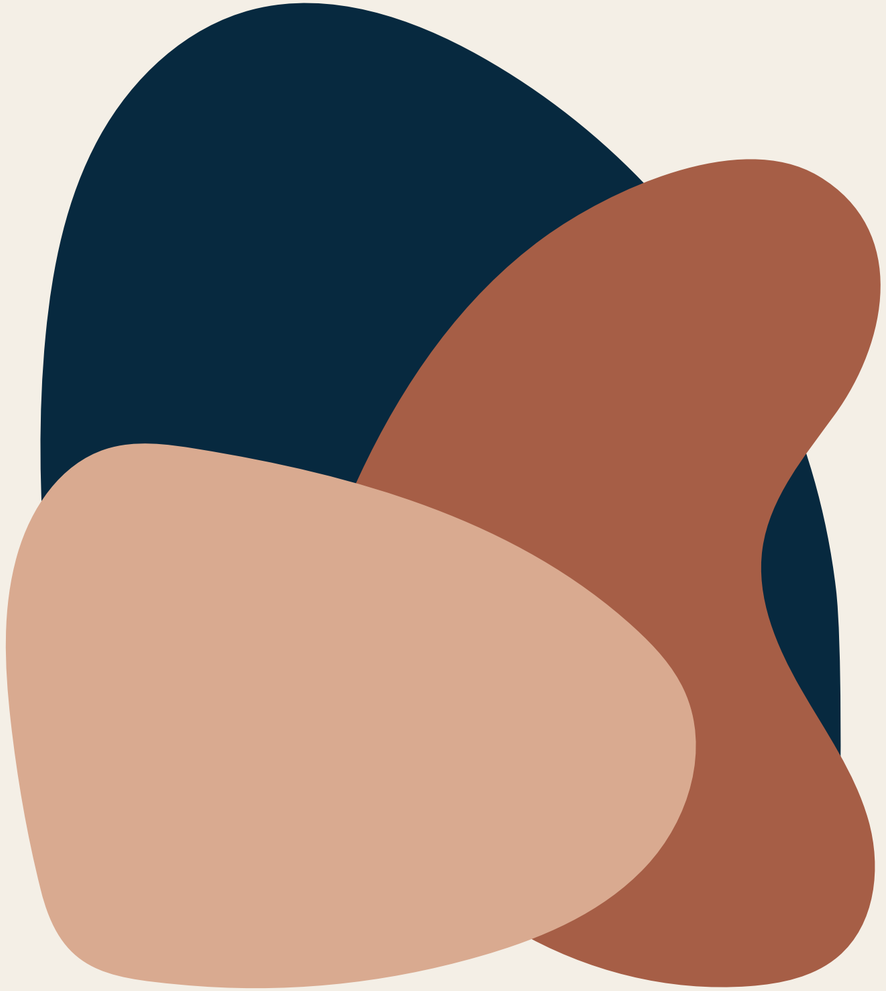
Practical Steps:

You've gotten this far in your business and that's something to celebrate. You've worked hard (maybe a little too hard) to get where you are. Our goal is to get you where you want to be, this guide is the first step.

If you're looking for more personalized support, that's what we're here for. Our team at Anita Louise is ready to help you get your business to operational excellence, one step at a time.

Ready for some help? Let's get started.

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