



KITELINE SYSTEMS AUDIT CHECKLIST

CHECK OFF THE SYSTEMS YOU'RE ALREADY DOING WELL. ANYTHING UNCHECKED MAY BE COSTING YOU TIME, ENERGY, AND MOMENTUM.

1. CALENDAR CONTROL

- I have a digital calendar that reflects my actual work week.
- I use time-blocking to protect strategic time and avoid multitasking.
- Meetings are scheduled automatically via tools like Calendly or Motion.
- I have buffer time built into my day/week.
- I review my calendar weekly to make adjustments.

4. CONTRACTOR & VENDOR OVERSIGHT

- I have a list of all contractors, vendors, and their responsibilities.
- I use a central place to manage deliverables and deadlines.
- I don't have to chase updates—they're scheduled or automated.
- Contracts, agreements, and SOPs are organized and accessible.
- I can take a vacation without projects falling apart.

2. FINANCIAL CLARITY

- I use software like QuickBooks, Xero, or similar for bookkeeping.
- I review cash flow and key financials at least weekly.
- I have a system for tracking unpaid invoices and upcoming expenses.
- My books are reconciled monthly by a bookkeeper or CPA.
- I know my monthly overhead, break-even, and profit margins.

5. CRM & CLIENT FOLLOW-UP

- I use a CRM (HubSpot, Streak, Pipedrive, etc.) to track leads and clients.
- Follow-ups are automated or scheduled.
- Onboarding and offboarding clients follows a clear process.
- I track customer notes, key dates, and previous interactions.
- No leads are slipping through the cracks.

3. TASK & PROJECT MANAGEMENT

- I use a system (Trello, ClickUp, Asana, etc.) to manage all business tasks.
- Tasks have owners, due dates, and status updates.
- I review priorities and progress at least weekly.
- Projects are broken into actionable steps.
- I'm not using post-it notes, texts, or mental lists as my primary system.

QUICK WINS

- I can name 3 tasks I do repeatedly that should be automated or delegated.
- I know which activities drain my energy or waste my time.
- I'm willing to let go of things that keep me in the weeds.