



# KITELINE SYSTEMS SETUP STARTER GUIDE

*A quick-start tool to help you delegate, automate, and systematize your way out of overwhelm*

## 1. Where Are You Still the Bottleneck?

List 3-5 recurring tasks or decisions that depend entirely on you.

- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_
- \_\_\_\_\_

## 2. What's the Cost of Staying Involved? (Check all that apply)

- |                                                               |                                                                       |
|---------------------------------------------------------------|-----------------------------------------------------------------------|
| <input type="checkbox"/> It delays growth opportunities       | <input type="checkbox"/> It adds stress and cognitive overload        |
| <input type="checkbox"/> It causes missed deadlines or errors | <input type="checkbox"/> It limits team autonomy and ownership        |
| <input type="checkbox"/> It pulls me away from strategic work | <input type="checkbox"/> Constant context switching drains your focus |

## 3. Which System Type Is Missing?

Match each bottleneck with the kind of system you might need.

| Task                                    | Solution Type                                                  | Notes                     |
|-----------------------------------------|----------------------------------------------------------------|---------------------------|
| e.g. Manually paying invoices           | <input checked="" type="checkbox"/> Automation (e.g. Bill.com) | Set up approval workflow  |
| e.g. Re-explaining how to post content  | <input checked="" type="checkbox"/> SOP + Delegation           | Document and assign to VA |
| e.g. Forgetting to follow up with leads | <input checked="" type="checkbox"/> CRM System                 | Explore HubSpot or Streak |

### Use this key:

- ☒ Automation (software that handles it for you)
- ☒ Delegation (give to a contractor, assistant, or team member)
- ☒ SOP (standard operating procedure anyone can follow)
- ☒ Tool Stack (choose software to manage this area)

## 4. Systemize Your Way Out in 30 Days

Pick 1-3 items and make a plan to implement or delegate by next month.

| Focus Task | System Type | Action Step | Owner | Due Date |
|------------|-------------|-------------|-------|----------|
|            |             |             |       |          |
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