

SYSTEMS CHECKLISTS

Quick Scan

I never want you to spend time fixing what isn't broken. Let's see if these questions about challenges and opportunities provide any insights.

CHALLENGES

What keeps you up at night?

What isn't getting done in your business or life?

What deadlines are you missing and why do you think you're missing them?

OPPORTUNITIES

What processes would make your work more efficient?

What recurring tasks could be streamlined or automated?

Now, think about the policies, forms, and procedures that you'd like to put in place so that your life and business runs more smoothly because you don't have to reinvent the wheel each time.

Use the checklists on the following pages as a starting point for this work, committing to creating one document for each section. My examples are business related, but you might have personal examples to add.

Policies

Boundaries or guidelines for how you run your business—whether just for you or to be shared. Circle the ones you already have written out. Check the ones you need.

- ☐ Refunds or returns
- ☐ Discounts
- ☐ Payments
- ☐ Exhibition and sales venues
- ☐ Teaching
- ☐ Commissions
- ☐ Reproduction of work
- ☐ Contractors and employees
- ☐ Donations of your art
- ☐ Charitable giving
- ☐ Free advice
- ☐ Comments on your blog
- ☐ Interaction in a forum you oversee
- ☐ Artists you feature

Other policies you might need:

Prioritize the policies you have checked above by adding a number beside the items that are relevant.

What is the first policy you will create and by when?

Procedures

Step-by-step guidelines for tasks that you repeat. Circle the ones you already have written out. Check the ones you need.

- ☐ Bookkeeping and maintaining financials
- ☐ Taking on commissions
- ☐ Organizing a workshop
- ☐ Packing
- ☐ Shipping
- ☐ Loading the kiln (or similar for your medium)
- ☐ Sending a newsletter
- ☐ Entering a show
- ☐ Writing a blog post
- ☐ Making and posting videos
- ☐ Updating a page on your website
- ☐ Registering copyright
- ☐ Onboarding a new student or mentee
- ☐ Following up with potential collectors
- ☐ Following up with galleries and venues

A number of the items above, such as organizing a workshop, might consist of numerous sets of procedures.

Other procedures you might need:

Prioritize the procedures you have checked above by adding a number beside the items that are relevant.

What is the first set of procedures you will create and by when?

Forms

Templates, reusable documents, emails, or web forms to save time. Circle the ones you already have ready to use. Check the ones you need.

- | | |
|---|---|
| ☐ Directions to the studio | ☐ Contracts or agreements for: |
| ☐ Responses to requests for: | ☐ Exhibitions |
| ☐ Donations | ☐ Commissions |
| ☐ Interviews | ☐ Consignment |
| ☐ Teaching | ☐ Collaborations |
| ☐ Speaking | ☐ Students or mentees |
| ☐ Commissions | ☐ Workshops |
| ☐ Exhibitions | ☐ Price lists for: |
| ☐ Free advice | ☐ Art |
| ☐ Cover letters | ☐ Products |
| | ☐ Teaching |

Other forms you might need:

Prioritize the forms you have checked above by adding a number beside the items that are relevant.

What is the first form you will create and by when?