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SELF-AUDIT · FIND THE ONE THING TO AUTOMATE FIRST

# The Systems Snapshot

## Find the one thing to automate first

A 30-minute self-audit for busy business owners. By Garage 30.

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### 01 Start here

Most owners buy the tool before they understand the job. New CRM, new app, a hire to "sort the admin." Six months later the mess is still there, just faster and more expensive.

There's a line worth keeping in your head. Bill Gates put it best: automation applied to an efficient operation magnifies the efficiency, and automation applied to an inefficient one magnifies the inefficiency. The skipped step is the bit in between, understanding the work before you throw tools at it.

This workbook is that step. You won't finish it with a tech stack. You'll finish it with one process named, the hours it costs you, and a clear first move. That's worth more than any app.

**How to use it:** Set aside 30 minutes. Pen or screen, doesn't matter. Answer honestly, the value is in the honesty. Work top to bottom. The last page is your Snapshot, the one-pager you keep.

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### 02 Where are you now

A quick read on whether your business is leaning on you instead of its systems. Tick the ones that are true right now.

- Your name is on almost everything. Delivery, ops, and the big decisions all run through you.
- If you took two weeks off with no laptop, things would quietly fall over.
- The "how we do it" lives in your head, not written down anywhere current.
- You've tried to fix this before. A tool, a hire, a spreadsheet. It didn't stick.
- You spend real chunks of the week on work that doesn't need your brain.
- You're busy most days but can't always point to what moved the business forward.

**Count your ticks:** \_\_\_\_\_ / 6

Four or more, and the problem isn't effort, it's the system around the effort. That's good news. Systems are fixable. Keep going.

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### 03 Zoom out first

Before you look inward, look around. It's easy to get lost in the particulars of your own niche and miss the forest for the trees. Spend ten minutes on the wider picture.

- Where does demand for what you sell actually come from? What has to be true in your customers' world for them to need you?
- Who or what do you depend on to deliver? Any supplier or tool that, if it vanished tomorrow, would stop you cold?
- Look sideways at competitors, here and overseas. Whose operation runs noticeably leaner than yours, and why might that be?

Write the one thing this surfaced that you'd been too close to see:

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If you have a team, do this part with them, not at them. The bonus is disagreement. Put your newest and longest-serving people in the same room and pay attention to exactly where they see it differently.

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### 04 Analyse

You can't improve what you haven't looked at straight. Get clear on three things, then map where your time actually goes.

#### Value — what you actually sell

Strip away the busywork. What does a customer really pay you for, and what has to happen, every time, to deliver it?

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#### Customer — who you serve

- Do you intimately know your best customer? If not, who are they?
- What actually motivates them? Why do they choose you over the alternative?
- Is there anything more you could offer them that they'd happily pay for?

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## The hard questions

Be your own analyst here, and don't flinch when it gets uncomfortable. Sit with each one.

- What are your most costly processes, in time or money? Why are they so costly?
  - Are there holes in the ship you've been ignoring? (Fix these before you automate anything. A faster leak is still a leak.)
  - Any supplier or single point of failure that leaves you exposed? Do you have a backup?
  - Are you living job-to-job on an unpredictable flow of customers? What would make demand steadier?
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## Map your week

List the repeating tasks that eat your time. Not the one-offs, the ones that come back every day or week. Aim for 8 to 12. Be specific ("chase unpaid invoices," not "admin").

#	REPEATING TASK	ROUGHLY HOW OFTEN	WHO DOES IT NOW
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			

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## 05 Find the one lever

Not all tasks are worth automating, and the order you pick matters more than most people think. Score each task from your list, 1 (low) to 5 (high).

- **Frequency** — how often it happens. Daily beats monthly.
- **Time** — how long it eats each time, including the mental switch to do it.
- **Rules-based** — how judgment-free it is. A clear if-this-then-that scores high. "It depends" scores low.
- **You-only** — how stuck it is to you specifically. If only you can do it, it's quietly capping the whole business.

Add the four scores. Highest total is your candidate.

TASK	FREQUENCY	TIME	RULES-BASED	YOU-ONLY	TOTAL /20

**Your top-scoring task (the one lever):**

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### Stress-test it

1. If this ran itself tomorrow, what would you do with the time you got back? If you don't have a real answer, pick the next task down.
2. Is the task itself sound, or is it broken work you're about to make faster? Fix the work first, then automate it.
3. Could you write down the rules for it in plain English in ten minutes? If yes, a machine can probably run it. If no, the judgment part is the bottleneck, not the task.

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## 06 Weigh your options

There's rarely one way to fix a process. Before you commit, put two or three options on the table and score them honestly. Try things on without falling in love with any of them.

Score each option 1 to 5, where 5 is best (so for cost, 5 means cheap):

- **Ease** — how simple it is to set up.
- **Cost** — how light on the wallet (5 = cheap).
- **Effort** — how little ongoing effort it takes (5 = set and forget).
- **Speed** — how fast it pays back.
- **Payoff** — how much it actually moves the needle.

Worked example, the lever is "chasing unpaid invoices eats four hours a week":

OPTION	EASE	COST	EFFORT	SPEED	PAYOFF	TOTAL /25
Auto-reminders from your invoicing tool	5	5	5	4	4	23
Hire a part-timer to chase them	3	2	3	3	4	15
Tighten payment terms up front	4	5	4	2	3	18

Now do your own:

OPTION	EASE	COST	EFFORT	SPEED	PAYOFF	TOTAL /25

A score won't capture everything (it misses the soft stuff), so sanity-check it against your gut, and watch for the bias toward whatever option you'd already decided on. But it's a sharp way to stop the cheapest, fastest win hiding in plain sight.

## 07 Implement

The honest version. You don't need a custom platform or new software for everything. Most of the win is wiring up the tools you already pay for.

### Could a system do this?

For your top option, answer these.

- What's the trigger that kicks it off? (A new booking, a Friday, an unpaid invoice hitting 7 days.)
- What's the rule? (When the trigger happens, do this.)

- Where does the result need to land? (An email out, a row in a sheet, a task assigned.)

If you can fill those three in, it's automatable. The gap is usually clarity, not technology.

## Wire what you have first

Before buying anything new, look at the tools already in your business. Bookings, invoicing, follow-ups, and reporting can usually be joined end to end. The repetitive, judgment-free work nobody should be doing by hand. Adding more platforms is the last resort, not the first.

## Define done, and one number

Pick the single metric this is meant to move. Most often it's hours back per week. Sometimes it's errors removed, or revenue saved from things slipping through the cracks. One number, agreed before you build, so you know what it was worth.

- **What "done" looks like:** \_\_\_\_\_
- **The one metric:** \_\_\_\_\_
- **Hours I expect back per week:** \_\_\_\_\_

## Then bank it and repeat

Automate one thing. Bank the hours. Spend some of them setting up the next one. That's how the compounding starts: zero to one, then one to ten. The owners who win don't do it all at once, they do it in order.

One more thing worth knowing. The best systems keep learning after launch instead of quietly decaying like static software. The know-how that's stuck in your head can be built into the system itself, so it stops walking out the door every time someone leaves.

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## 08 Your Systems Snapshot

The one page to keep. Fill it in and pin it where you'll see it.

### **The one process I'm automating first**

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**What it costs me now** (hours per week, or the headache it causes)

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**Why it's the lever** (its score, and what it unlocks)

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## The option I'm running with

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## What "done" looks like, and the one number it moves

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Then answer the four that turn a plan into motion:

- What can I do today?
  - What can I do without spending a cent?
  - How will I measure the result?
  - Who owns it?
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## 09 Where to from here

You've done the part most people skip. You looked before you bought. Even if you stop here, you know more about your business than you did 30 minutes ago, and you've got a clear first move.

If you want a second set of eyes on your Snapshot, that's what the first call is for. Thirty minutes, no pitch. We look at your one lever together and you'll leave knowing whether it's worth solving and roughly what it'd take. If you're staring at this right now, a short call is the fastest way to find out.

**Book a 30-minute call:** [cal.com/casey-hemingway/30min](https://cal.com/casey-hemingway/30min)

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