

The Local Business Systems Checklist

Ten systems every local business should run on. Check each box you can honestly say "yes" to. Then count your checks and use the score at the end to decide what to fix first.

1. Phone & missed calls

- ☐ Every call is answered or gets a text back within minutes, even after hours
- ☐ Urgent calls (leaks, emergencies, hot leads) reach you right away
- ☐ You can see how many calls you missed last week

Tools: AI receptionists, missed-call text-back

2. Lead capture & follow-up

- ☐ Every lead (call, form, text, DM) lands in one list
- ☐ Each lead gets at least 3 follow-ups before you give up

Tools: CRM, field service software

3. Quotes & estimates

- ☐ Quotes go out within 24 hours, from a template
- ☐ Unanswered quotes are followed up automatically

4. Scheduling & booking

- ☐ Customers can book or request a time online
- ☐ Reminders go out automatically to cut no-shows

5. Invoicing & payments

- ☐ Invoices go out the day the job is done
- ☐ Customers can pay by card or bank online
- ☐ Overdue invoices get automatic reminders

6. Reviews & reputation

- ☐ Every happy customer is asked for a Google review
- ☐ Every review gets a reply, good or bad

7. Website & Google Business Profile

- ☐ Your site loads fast on a phone and has a clear call/book button
- ☐ Your Google Business Profile has current hours, photos and services

8. Email & text marketing

- ☐ You collect customer emails/phone numbers with permission
- ☐ Past customers hear from you at least every season

9. Automation between apps

- ☐ You never copy the same info into two apps by hand
- ☐ New leads, jobs and payments flow between your tools automatically

10. Knowing your numbers

- ☐ You know your monthly leads, close rate and average job value
- ☐ You review those numbers at least once a month

Your score (out of 23): **19–23** Strong systems, so focus on growth. **12–18** Solid base with leaks; fix sections 1–3 first. **0–11** You're working too hard; start with phone, follow-up and payments.

Want help? Daniel Swarey sets up these systems over Zoom, by phone, or on-site in Lancaster County, PA:
toolsforlocals.com/work-with-daniel