

# The Friday Audit

A one-page checklist for finding the work a system should be doing. Print it, sit with your team on a Friday afternoon, and be honest.

## Inside

1. How to run it in thirty minutes
2. The checklist, six areas
3. Reading your score, and what to do on Monday
4. Where the highest-scoring area points



### How to run it

## Thirty minutes, one Friday, everyone in the room.

Every company has work that a system should be doing. It is rarely dramatic. It is the call that got returned on Tuesday instead of Monday, the invoice that went out a week late, the same address typed into three places. Nobody notices any one instance. The week absorbs it. This audit is a way to make the week give it back.

### The rules

1. **Friday afternoon, last thing.** The week is fresh. Memory of it will be gone by Monday.
2. **The people who do the work, not just the people who manage it.** The office manager knows what got retyped. The person who manages the office usually does not.
3. **This week only.** Not "usually." Not "sometimes." Did it happen this week, yes or no.
4. **No fixing.** You will want to solve things as they come up. Write them in the margin and keep going. The count matters more than any one item.
5. **No blame.** Every box you check is a system that should exist and does not. It is never a person's fault that the system does not exist.

**You are not looking for who dropped the ball. You are looking for the balls nobody should have been holding.**

### How to score it

Go through all six areas on the next two pages. Check every box that happened this week. Count the checks in each area and write the number in the box at the bottom of the section. Then turn to the last page.

### Do it again in a month

The first audit tells you where you are. The second one tells you whether anything changed. A month is long enough for one fix to show up in the count.

**The checklist, part one**

## This week, did this happen?

### The phone and the inbox

- ☐ A call, text, or web form went unanswered for more than an hour during the day
- ☐ Something came in after hours and waited until the next morning
- ☐ Nobody was sure who was supposed to respond to a request
- ☐ A lead from earlier this month is still sitting in somebody's inbox
- ☐ The same question was answered by hand more than three times

Checks in this area: \_\_\_\_\_

### Quotes and estimates

- ☐ A quote took more than a day to get out the door
- ☐ One person was the only one who could produce a quote
- ☐ A quote was built from scratch when a similar one already existed
- ☐ A bid or request was turned down because nobody could get to it
- ☐ A quote went out and nobody followed up on it

Checks in this area: \_\_\_\_\_

### Paperwork

- ☐ The same information was typed into two different places
- ☐ Someone spent time chasing a document that should have arrived on its own
- ☐ A file could not be found when someone needed it
- ☐ A permit, certificate, license, or lease was found to be expired, or nearly
- ☐ A form was filled in by hand with information the company already had

Checks in this area: \_\_\_\_\_



## The checklist, part two

## This week, did this happen?

### Money

- ☐ An invoice went out more than a day after the work was done
- ☐ An invoice is overdue and nobody has followed up
- ☐ A payment came in and did not match anything in the books
- ☐ Someone spent part of a day reconciling by hand
- ☐ A short payment or an error was found later than it should have been

Checks in this area: \_\_\_\_\_

### Knowing where things stand

- ☐ A manager was asked “where are we on this” more than three times
- ☐ A problem on a job surfaced after it was too late to fix cheaply
- ☐ A number was needed and somebody had to build a spreadsheet to get it
- ☐ Two people had different versions of what was happening
- ☐ Something stalled because the one person who knew was out

Checks in this area: \_\_\_\_\_

### People

- ☐ A new or newer hire had to ask how to do something that is done every week
- ☐ A task was done wrong because the instructions live in someone's head
- ☐ Someone stayed late or worked the weekend to catch up on routine work
- ☐ A hire is being considered for work that is mostly repetitive
- ☐ A process depends on one person and everyone knows it

Checks in this area: \_\_\_\_\_

Total checks: \_\_\_\_\_ out of 30



### Reading your score

## What the count means.

| Total      | What it usually means                                                                                                                                                                                                                                                                          |
|------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 0 to 5     | The company runs well. Look at whichever area had the most checks. There is probably one small thing worth fixing, and it may not need a system at all.                                                                                                                                        |
| 6 to 12    | Normal for a growing company. The week absorbs a few hours of work that a system should be doing. One or two builds, started with the highest-scoring area, usually gives most of it back.                                                                                                     |
| 13 to 20   | The back office is the ceiling. The company can take on more work, but the paperwork, the follow-up and the money cannot keep up with it. This is the point where most organizations decide to hire. It is worth a conversation first, because most of the checked boxes do not need a person. |
| 21 or more | The company depends on a few people carrying everything, and it will stop when they do. Nothing is broken that cannot be fixed, but the first fix should be the one that takes the most off those people's desks.                                                                              |

### What to do on Monday

- ☐ Pick the area with the most checks. Ignore the others for now.
- ☐ Take the single box in that area that cost the most this week, and follow that one process from start to finish. Our first guide, The One Process Rule, is the one-page way to do that.
- ☐ Decide whether that work needs a person. Most of it does not.
- ☐ Put the next Friday audit on the calendar, one month out.



### Where to start

## Where the highest-scoring area points.

Each area on the checklist lines up with one kind of build. The one with the most checks is usually the one worth doing first, and it is usually smaller than people expect.

| Highest area               | What usually gets built first                                                                                            |
|----------------------------|--------------------------------------------------------------------------------------------------------------------------|
| The phone and the inbox    | Every inquiry answered in minutes, any hour, with follow-up that runs on its own.                                        |
| Quotes and estimates       | Requests turned into draft quotes from your own history, so one person is no longer the bottleneck.                      |
| Paperwork                  | Documents pulled from email and filed, forms filled from what you already have, expirations tracked.                     |
| Money                      | Invoices sent when the job closes, reminders that escalate on their own, payments matched in the books.                  |
| Knowing where things stand | One place where work, status and ownership live, and a plain summary every Monday.                                       |
| People                     | Your processes captured and turned into steps a new hire can follow, with recurring tasks that arrive with instructions. |



# Bring the score. We will tell you what to fix first.

Thirty minutes. Walk us through the audit and we will tell you which box is worth building for, which are not, and roughly what it would take. If the honest answer is that you are fine, that is what we will say.

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