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## **CGS**

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## **One-Page Reset Tool for Business Owners**

**See what’s working. Spot what’s missing. Start fresh.** *No pressure. Just clarity.*

### **WHERE ARE YOU HOLDING TOO MUCH?**

❑ I’m still involved in quoting or pricing every client  
 ❑ I train or explain things to my team repeatedly  
 ❑ I follow up with leads or past clients myself  
 ❑ I remind people of their roles or next steps often  
 ❑ I’m the only one who knows how “everything fits”

If you checked **2 or more**: You’re running the business **on your back**, not through your systems.

### **WHAT DO YOU ACTUALLY HAVE BUILT?**

| **System** | **Yes** | **Sort of** | **No** |
| --- | --- | --- | --- |
| Written SOPs or checklists | ❑ | ❑ | ❑ |
| Client onboarding system | ❑ | ❑ | ❑ |
| Team roles + task delegation | ❑ | ❑ | ❑ |
| Pricing or quote template | ❑ | ❑ | ❑ |
| Review + follow-up rhythm | ❑ | ❑ | ❑ |
| Dashboard or task tracking | ❑ | ❑ | ❑ |

Even **3+ ‘sort of’ answers** = system overload is closer than you think.

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### **WHAT WOULD CHANGE IF THIS WAS SOLVED?**

❑ I’d have time to focus on growth  
 ❑ I could finally step back and trust the team  
 ❑ I’d stop repeating myself  
 ❑ I’d close more deals without chasing  
 ❑ I’d stop feeling behind all the time

🟦 These are your real goals. The systems are how you get there.

### **✅ Want help? Choose your path:**

* **Try the CGS Platform Free** → [14-day full access, tools included](https://cgsglobal.net/cgspage14daytrail)
* **Book a 15-Minute Call** → [We’ll walk you through the first step](https://cgsglobal.net/home)
* **Fill Out the UBBMT** → [Your full business check-up (Free)](https://link.creativeguestsolutions.com/widget/form/e8hdmGUOkAOlBh7VpBdU)

🎁 With the UBBMT, you'll also get:  
 A **free 3-month DIY implementation plan**—custom-built from your answers, to guide your next steps with or without our help.

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## **1-Hour Task Transfer Sheet**

### **Step 1: Quick Task Dump (10 Minutes)**

Write down every task you’ve done more than twice this week.

Don’t overthink it. Just list them.

Examples:

* Send appointment reminders
* Update spreadsheets
* Answer "how do I pay" messages
* Re-explain where to find files
* Clean up your calendar
* Post to social media
* Check who hasn’t paid

### **Step 2: Filter What You Can Offload (15 Minutes)**

Next to each task, check what applies:

| **Task** | **Can Be Delegated** | **Can Be Automated** | **Can Be Turned Into a Template** | **Must Stay With Me** |
| --- | --- | --- | --- | --- |
| Example: Send reminders | Yes | Yes | Yes |  |
| Example: Client onboarding | Yes |  | Yes |  |
| Example: Strategic planning |  |  |  | Yes |

If a task is repetitive and doesn’t require your unique skill, offload it.

### **Step 3: Create a Simple SOP for Each Transferable Task (25 Minutes)**

Use this format to write out how you currently do it.

Task Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

1. When to start the task: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
2. Step-by-step instructions:  
   * Step 1: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Step 2: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
   * Step 3: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_
3. How to know it's done: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Repeat this for at least three to five tasks. Keep it short and clear.

### **Step 4: Send It Off (Optional Language to Delegate the Task)**

Use this message to hand it off to a team member, assistant, or VA:

"I’d like to offload this task. I’ve written down how I usually handle it. Let me know if anything’s unclear. I’m trusting you with this so I can stay focused on the bigger picture."

### **Step 5: Keep This Visible**

Every task you keep is a decision.  
 Every task you offload is an investment in your time, clarity, and growth.

**You’ve just reclaimed your time.** Use this sheet anytime you feel overwhelmed.  
 The more you delegate, the more your business can grow—without burning you out.

## **10 Tasks to Never Do Again**

**If it repeats and doesn’t require your decision-making, it should be delegated, automated, or templated.**

1. **Appointment Reminders** These should be automated or sent by someone else using your calendar and CRM.
2. **Chasing Invoices or Payments** Use scheduled reminders, automatic billing, or delegate to an assistant.
3. **Manual Quote or Pricing Emails** Create a pricing system and use quote templates. Delegate or automate.
4. **Onboarding Emails or Forms** These should be structured once and triggered automatically for every new client.
5. **Explaining How to Find Documents** Use shared folders, naming conventions, and a quick reference SOP.
6. **Checking Project Status** Use task tracking tools or a dashboard. Have someone send you a weekly update.
7. **Updating Spreadsheets** If it’s repeatable, it can be automated or passed to a VA.
8. **Writing Standard Emails From Scratch** Use templates for follow-ups, intros, check-ins, and reminders.
9. **Social Media Scheduling** Batch the content once and delegate scheduling—or automate with tools.
10. **Telling Team Members What to Do Next** Use recurring task checklists and clear roles with due dates. Let the system lead.

**The Rule:** If you’ve done it more than twice, it’s ready to be offloaded.

**The Goal:** Free your time. Protect your focus. Scale without overload.