



SYSTEMS BLUEPRINT TOOLKIT

Flexi-Tribe the one **tool** missing from your belt.

FLEXI-TRIBE SYSTEMS TOOLKIT

WHAT IT IS

A **step-by-step** guide from the team behind your team – Flexi-Tribe.

- A practical starter kit to help you get your administration under control.
- A simple way to hand off the tasks you do not enjoy to someone who does.
- Shows you where your time is being lost and how to take it back.
- Gives you ready-to-use templates to clean up your back office.

WHO IT'S FOR

- ✓ Tradies, contractors, civil and service-based businesses
- ✓ Anyone tired of doing everything themselves and ready for administration support.
- ✓ Business owners overloaded with paperwork, quoting or job follow-ups.

HOW IT HELPS

- Shows where you're wasting time (and how to fix it)
- Gives you practical templates to clean up your back of house
- Gets you delegation-ready - quickly!



Book a session with our team to map out your delegation plan.

TASK AUDIT & TIME TRACKING

Where is your time actually going?



A practical time audit tool to help business owners get clear on where their time actually goes and what needs to stop. Most administration tasks do not require the business owner and this tool helps you see that clearly. It shows which tasks are worth your time and which can be delegated, systemised or dropped altogether.

WHY IT MATTERS

- ✓ Shows what is actually draining your week.
- ✓ Helps you see which tasks generate income.
- ✓ Highlights where you can reclaim hours through smarter delegation.
- ✓ Supports clearer decisions about what to keep, hand off or outsource.
- ✓ Builds the foundations you need to put simple systems in place.

HOW TO USE THIS IN 3 SIMPLE STEPS

STEP 1: FILL IT IN

- List out all the tasks you do in a typical week quoting, invoicing, filing, chasing payments, emails, etc.
- Note how often you do them and how long they take.

STEP 2: WHAT'S WORTH YOUR TIME

Use the checklist columns to identify:

- What makes you money
- What requires you (versus someone else)
- What could be handed off to a VA or team member

STEP 3: REVIEW YOUR TOTALS

- Look at how much time is spent on administration.
- If more than 10% of your time is spent on repetitive or non-revenue work, it's time to systemise or delegate.

PRO TIP

- Be honest about how long tasks takes
- Anything you do more than twice a week should be automated or handed off
- Use this data to build your first SOPs and onboarding documents
- Repeat the audit quarterly to track improvements



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ROLES & RESPONSIBILITY MATRIX

Who's meant to be doing what?

A simple tool to help you map out who is responsible for what and where you are carrying more than you should. You may be surprised by how many tasks land on your plate by default and how many can be shifted or handed off.

WHY IT MATTERS

- ✓ Clarifies roles and responsibilities
- ✓ Stops tasks from being missed or overlooked
- ✓ Gets you ready to delegate to an administrator
- ✓ Makes onboarding new team members far easier
- ✓ Helps you operate like a business owner, not just the person doing all the work

HOW TO USE THIS IN 3 SIMPLE STEPS

STEP 1: ADD YOUR TEAM ROLES

Add your team roles, starting with these common ones: I.e. Business Owner | Administrator or Bookkeeper | Operations or Project Manager | Site Team (match list to your structure)

STEP 2: GO THROUGH THE TASK LIST

The list includes typical business areas:

- Administration & Filing
- Invoicing & Finance
- Client Communication
- Job Setup & Delivery
- HR & Onboarding
- Compliance & Reporting

For each task, mark the appropriate role as:

R – Responsible (does the task)

A – Accountable (owns the result)

C – Consulted (needs to give input)

I – Informed (needs to be kept in the loop)

STEP 3: LOOK FOR BOTTLENECKS

- Are too many responsibilities sitting under your name?
- Are some tasks not assigned to anyone?
- Are you accountable for things you do not need to own?

Highlight the quick wins: What can be delegated to your administrator or operations lead?

PRO TIP

- Start small: pick 3–5 administrative tasks to delegate using this sheet and pair it with your SOP template for a smooth handover.



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FILE STRUCTURE & NAMING RULES

If someone else can't find it, they can't help you.

A simple setup to organise your digital workspace, so files are easy to find, easy to share and easy to action, whether it's you, a team member, or someone you bring on later.

WHY IT MATTERS

- ✓ Stops wasted time digging through folders
- ✓ Keeps things clean, clear and client-ready
- ✓ Gets you ready to delegate to an administrator or virtual assistant
- ✓ Prepares your business for growth and delegation
- ✓ Makes handovers, audits and admin smoother

WHAT'S INCLUDED

- A ready to use layout for your digital drive
- Access and Permissions Tracker (useful for current staff and future hires)
- Naming Rules Guide

HOW TO USE THIS IN 3 SIMPLE STEPS

STEP 1: SET UP YOUR DRIVE

- Copy the Folder layout to your drive of your choice (Google Drive, OneDrive, or SharePoint work great)

STEP 2: REVIEW ACCESS AND PERMISSIONS

- Start using the Access & Permissions tab in the Folder Matrix Tracker to assign folder access—even if it's just you for now. This helps you stay organised and track who has access as your team grows.
- After adding them to the tracker, apply the permissions to your drive.

STEP 3: STICK TO THE NAMING RULES

- Once you begin using the folder to save files, it's important to apply the correct naming conventions from the start. Please refer to the Naming Guide tab within the Folder Matrix to ensure consistency and easy retrieval across your team.



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SOP TEMPLATES & ADMIN SCRIPTS

Train once. Never explain again.

A simple structure to organise your digital workspace so files are easy to find, easy to share and easy to action. Whether it is you, a team member or someone you bring on later.

WHY IT MATTERS

- ✓ Saves you from repeating instructions
- ✓ Makes it easier to bring on help now or in the future

- ✓ Improves consistency and professionalism
- ✓ Reduces errors and delays in administration tasks

WHAT'S INCLUDED

- SOP (Standard Operating Procedure) Template
- Invoicing SOP example
- Admin Scripts:
 - Quote Follow-Up
 - Payment Reminder

HOW TO USE THIS IN 3 SIMPLE STEPS

STEP 1: WRITE YOUR SOP

- Pick one recurring task (e.g. quoting, invoicing, onboarding)
- Use the SOP template to write down:
 - When it happens
 - Who does it
 - What steps to follow
 - What tools or templates are needed

STEP 2: USE OR CUSTOMISE SCRIPTS

- Use or customise the scripts provided for fast client follow-up
- Store it somewhere central (Drive, SharePoint, etc.) so it's easy to access

STEP 3: MONITOR AND UPDATE

- Update as your process improves — it's a living document!



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GET IN TOUCH WITH FLEXI-TRIBE THE TEAM BEHIND YOUR TEAM



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