

WARD Review



I get things done

Hello!

Are you ready to transform your business into an awesome, efficient, streamlined machine? My WAND review is your first step on that journey.

Thanks for downloading my workbook. It's always a great time to review key areas of your business and think about what can be updated and improved. I hope you find this useful and it gives you some focus in the coming weeks and months.

Why WAND?

WAND is the method I use to review my business - it works so well I wanted to share it. Follow the steps in each area and you'll end up with a plan. Simple!

How do you use the workbook?

This workbook aims to focus your mind on specific areas of your business, giving you some pointers to start you thinking about those areas you can develop further.

Go through each section, making notes in the spaces provided. I've left a couple of blank pages at the end for you to add any areas you have, that may be specific to your business. If you have any questions, or simply want to bounce some ideas around, please get in touch with me at sj@office-fairy.co.uk.

Enjoy the review!

Sarah-Jane

PS. If you've enjoyed doing this review, or found my workbook helpful - I'd love to hear from you.....you can leave a comment or a photo at Instagram [@officefairysj](https://www.instagram.com/officefairysj) or Facebook [@fairysj](https://www.facebook.com/fairysj)

Your Website

What's your current position?

- ◆ Do you have a website? Do you want one? Does it need a refresh?
- ◆ Are you happy with the platform you're using?
- ◆ Is it optimised for SEO (search engine optimisation)?
- ◆ Is there a Call To Action on your landing page?
- ◆ Are your latest products/services displayed? Are your contact details up to date?

Top Tip

Use www.siteline.com to check for broken links in your website

Analyse - is it working?

Needs - what do you need from this?

Develop - what are your next steps?

Filing & Storage

What's your current position?

- ◆ Where do you store your files? Are they all in one place?
- ◆ Do you use a cloud based server? Is it time to investigate this?
- ◆ Are you confident your files are secure and backed up?
- ◆ Can you find things easily? Do you spend a lot of time looking?
- ◆ Is there a structure to your files? Is it time for some organisation?

Top Tip

Create a template folder for each client, then create sub folders inside this folder for things like invoices, correspondence etc. Each time you get a new client, you can copy and paste this structure - saving you time

Analyse - is it working?

Needs - what do you need from this?

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Systems & Tools

What's your current position?

- ◆ What systems do you use? What do you like about them?
- ◆ Do you want to implement something new?
- ◆ Do you use a CRM (client relationship management) system?
- ◆ Do you need any training on your current systems?

Top Tip

Before you launch into a new system, nail down your current processes, and use the pain points here to define your requirements

Analyse - is it working?

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Managing customer info

What's your current position?

- ◆ Where do you keep client info? Do you have a CRM? Do you need one?
- ◆ Are you registered with the ICO?
- ◆ Do you understand your responsibilities re Data Protection and GDPR?
- ◆ Do you have a privacy policy? Is it time to write one?

Top Tip

Download a template from the ICO website to record your data processing activity

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Emails

What's your current position?

- ◆ Are you overwhelmed by your inbox? Are you missing important emails because there are too many messages?
- ◆ Can you find some time to unsubscribe from the emails you don't want?
- ◆ Do you have a branded signature block?
- ◆ Have you created folders/labels for your emails?

Top Tip

Spend 20 mins at the beginning and end of each day "housekeeping" your mailbox - delete the junk, file the "FYI" and only keep the "To Do" in your inbox

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Branding

What's your current position?

- ◆ Do you have a logo? Is it time for an update?
- ◆ Is your brand reflected on your website and social media?
- ◆ What about your invoices and other documents?
- ◆ Do you need any business cards or other marketing materials?

Top Tip

Your brand is a reflection of your ethos, values and culture. It's what your customers will remember about you.

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Social Media

What's your current position?

- ◆ Do you have a social media presence? Should you?
- ◆ Are your customers engaging with you on these platforms?
- ◆ Have any clients left reviews on your social media pages?
- ◆ Which platform works best for you? Why is this?
- ◆ Do your pages lead your clients to your website?

Top Tip

Stay on top of comments from your followers. If you don't respond to comments, your followers will lose interest in engaging with you.

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Needs - what do you need from this?

Develop - what are your next steps?

Email Marketing

What's your current position?

- ◆ Do you do email marketing? Do you need to?
- ◆ Do your emails help your clients? Are you sharing your expertise?
- ◆ What's your strategy for the next 12 months? Do you have one?
- ◆ Do you use an automated email marketing provider?
- ◆ Can people subscribe to your emails on your website?

Top Tip

A lead magnet or freebie is a great way to engage new clients and expand your contacts list!

Analyse - is it working?

Needs - what do you need from this?

Develop - what are your next steps?

HR

What's your current position?

- ◆ Have you got employees? Do they all have contracts?
- ◆ Do you keep records for all your employees? Is it time for an audit?
- ◆ Do you have any policies? Are they all up to date?
- ◆ Are you managing with the current workload? Could you use some support?

Top Tip

An Employee file should contain: contract of employment, salary and bank details, absence records, training records

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Needs - what do you need from this?

Develop - what are your next steps?

Data & Management Info

What's your current position?

- ◆ Do you have enough information about the different aspects of your business activities to make informed strategic decisions?
- ◆ If not, why not? Do you need better systems or processes?
- ◆ What key things do you want MI about?
- ◆ How do you know how you're doing?

Top Tip

"You can't improve it, if you don't measure it."

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Needs - what do you need from this?

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Set some goals

Now you've completed quite an extensive review, it's time to collate your thoughts and start to formulate a plan - my favourite part!

Begin by establishing your top 3-5 development areas to achieve in the next 12 months, and write them down here:

What am I going to do?	How am I going to achieve it?	What support do I need?
1		
2		
3		
4		
5		

Next, use these goals to plan ahead and set smaller, more manageable objectives for the next week/month/quarter/year. You might need to use another paper planner or online tool for this.

Just before I go...

Thanks again for downloading my WAND review workbook, and well done for getting to the end.

I'd love to hear how you got on, and of course, if there's anything that's come out of your review that you want to talk about, please get in touch with me.

How I can help you

I work hand in hand with small business owners helping them streamline, automate and maintain compliance by providing a blend of focused sessions alongside practical back office support. I love HR, tech, and organising and I'm a whizz at bringing all of this together to provide awesome, efficient systems and processes for your business.

How you can get in touch with me



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Or...

...you can cut straight to the chase and book a call by clicking here:



Any way, I'd love to hear from you!

I get things done