



The Streamlined Office, LLC

Process Solutions for Small Businesses

Every small business should have established processes in place to optimize business efficiency. Without organizational systems to manage workflow, many business owners are left feeling overwhelmed in their attempt to juggle all of the tasks at hand. Are you missing or struggling with any of these critical areas?

Document Retention Guidelines

Do you have a clear and concise list of documents that need to be kept? Do you know why you keep your documents and how long you should keep them?

Paper filing systems

Do you have a process for handling paper documents so that information can be found quickly and easily, or are you wasting time looking for items that you can't find?

Digital filing systems

Do you have a digital filing system with naming conventions and appropriate backup? Is your digital information secure and accessible no matter where you are? Can you find what you need every time?

Email

Is your Inbox overwhelming? Are you using folders, filters, categories, tags, and automatic scheduling for correspondence and replies? Do you have processes to keep your inbox manageable?

Digital calendar

Do you create calendar appointments, notify attendees, and update changes directly from your email? Is your calendar overloaded or is it a tool that helps you use your time as efficiently as possible?

Customer Relationship Management (CRM) systems

Do you have a system that allows you to track clients or do you struggle with prospect follow-up and lose business as a result?

Physical workflow

Does your office space represent your expertise by looking organized and well run or does the clutter in your office reflect a lack of systems and processes?

Technology

Are you using technology to make your business processes easier and more efficient? Do you need help deciding what software to use and how to use it to streamline your business processes?

The Streamlined Office provides process solutions for small business and home offices. We can help you overcome the obstacles to business success created by inefficient systems and poor workflow. If you need help with any of the above or have questions, please visit our website at www.thestreamlinedoffice.com or contact us at 480-221-0588 for a FREE consultation.