RAWTECH · WEB SYSTEMS STUDIO

The Local Service Business Systems Checklist

17 questions to find out where leads, time, and money are leaking out of your business — and what to fix first.

How to use this

Print it. Sit with it for 10 minutes. Tick the box only if the answer is an honest yes — not how you wish it worked.

At the end, count your yes-checks and read the scoring panel. The fewer yes-checks, the more your business is running on willpower instead of a system.

1 Your website

- [ ] Can a visitor book or request an appointment in under 30 seconds — without calling or emailing?
- [ ] Does your site load in under 3 seconds on a phone over cellular data?
- [ ] Does every service page have a clear next step (book, call, quote) above the fold?
- [ ] When a form is submitted, does the lead land somewhere you actually check — or in a forgotten inbox?

2 Booking & intake

- [ ] Can customers see your real availability and pick a time themselves?
- [ ] Do new bookings automatically land on your team's calendar with the customer's info attached?
- [ ] Are intake forms collecting what you actually need to prepare for the appointment — not a wall of fields?
- [ ] Are no-shows reduced by automatic reminders (text + email) the day before?

3 Payment & deposits

- [ ] Can you collect a deposit or payment online without phoning the customer for their card?
- [ ] Do paid invoices automatically update your books and your CRM?

4 Follow-up & retention

- [ ] Does every lead get a follow-up touch within 24 hours — even when you forget?
- [ ] Do past customers get an automated nudge for repeat business (annual checkup, seasonal service, re-booking)?
- [ ] Do you ask for a Google review automatically after a job is marked complete?

5 Visibility & ops

- [ ] Can you see — on one screen — how many leads, bookings, and revenue you got this week?
- [ ] Do you know which marketing channel (Google, referrals, ads, social) is producing actual revenue?
- [ ] Could a new team member onboard from documentation, or does everything live in your head?
- [ ] If your top tool went down tomorrow, would the business keep running?

Score yourself

0–5 yes: Your business is running on willpower. A connected system pays for itself within months.

6–11 yes: You've patched the basics. The gaps are where leads and time still leak out.

12–17 yes: You have a real operating system. The next layer is automation and visibility.

What to do next

Pick the 3 boxes that hurt the most. Those are your highest-ROI fixes — usually some combination of: a site that actually books, automated follow-up, and one dashboard that tells you what's working.

If you want a second pair of eyes, RAWTech runs a free 20-minute review where we walk through your current setup and tell you — honestly — which 1–2 fixes would move the needle most. No deck, no pitch.

Book a free 20-minute review

Bring your honest answers. We'll tell you the 1–2 fixes that pay back fastest.

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