

BUILDING A SYSTEM BRINGS OUT THE BEST IN YOUR TEAM

Background

It was an interesting business meeting yesterday, and I couldn't help thinking about the issues we discussed and how we could find ways to create a system that helps us to scale without the headache.

While it was obvious most of us experienced challenges with seemingly talented employees who lack the right attitude to fit into our work culture and expectations, I couldn't shake off the recurring question of whether we've built the right systems to manage these talents efficiently, to scale our businesses.

As a digital nomad who has built my routines using a mix of freelancers and digital tools to deliver solutions to my clients, I want to share some of the tips and tools that have helped me to manage workflow and keep my eye on all the balls - ensuring that only a minimal number are dropped.

So, now, to the meat of my thoughts...

Why do our businesses struggle with finding and maintaining "The Right Talent"?

Our business network conversation yesterday brought one thing into sharp focus:

Most businesses don't just have a talent problem; they have a systems problem.

Almost all of us shared similar frustrations. Either:

"My business development team can't be tracked."

"Salespeople promise deals that never materialise."

"There's no proof of what they do outside the office."

"We hire good people, but they don't deliver."

On the surface these may seem like human problems, but I also found that at the core of this lie cultural and systemic gaps.

These include problems in organisational design, process, and accountability.

What business lacks most is a closed-loop system.

It's a structure in which every activity, outreach, and promise go into a transparent workflow that is visible, measurable, and actionable by any stakeholder.

With this document, I'd try to demonstrate how you go about building that system right from scratch, thus:

THE ROOT CAUSE: No systems, No SOPs, No visibility

Most of us operate on trust and verbal updates.

But modern business requires visibility, traceability, and repeatability.

Without this, the business will always struggle with:

- Accountability gaps
- Poor sales forecasting
- Zero evidence of activities
- Difficulty in judging the performance of staff members
- Blame games between teams
- A culture based on assumptions, not data.

No matter how great the talent, a business without systems cannot scale.

THE SOLUTION: SSOT - Single Source of Truth

What this entails is creating a centralized hub where all commercial activity will live.

This can be:

- HubSpot CRM
- Zoho CRM
- Pipedrive
- Monday.com
- Airtable CRM system

It is not the tool that matters, but the structure.

The CRM should be the brain of the business.

1. All leads go into the CRM.
2. All outreach is logged.
3. Every meeting is documented.
4. Everything is visible, task-related and follow-up.
5. All outcomes feed your pipeline.

When a BD executive says, "I've spoken to the client," you should see

- When
- How
- What was discussed
- The next step is what?
- And whoever possesses the next action

This removes all guesswork and restores accountability.

SOP FRAMEWORK: How to build a closed-loop sales system

A simplified SOP format may flow as follows:

Step 1: Lead Capture SOP

1. Define how leads enter the system.
2. Website forms sync directly into CRM.
3. WhatsApp inquiries captured through integrations
4. Manual entries are in a standard intake format.
5. All leads get tagged with source + owner
6. No lead should be left on one's phone.

Step 2: Outreach & Follow-Up SOP

1. Define how staff need to engage leads:
2. First contact attempt within X minutes
3. Minimum of X touchpoints before marking as cold
4. Every call, message, and e-mail logged.
5. All follow-ups assigned as tasks with deadlines.
6. Follow-up reminders automated
7. Policing by your system, not by you.

Step 3: Meeting & Proposal SOP

1. Standardization of the processing of opportunities:
2. Minutes from meetings are documented in CRM.
3. Proposal templates maintained in a central library
4. Proposal was sent directly from CRM, so it is tracked
5. Forecasting included with expected close date
6. Automated reminders to follow up on proposals
7. Every transaction should leave a digital footprint.

Step 4: Closing the Deal SOP

1. Ensure clarity at the finish line:
2. Client verbally confirms → update CRM
3. Invoice sent from finance → upload into deal record
4. Payment tracked
5. CRM stage updated
6. Automatic, event-driven handover to account management
7. This creates a seamless transition from sales to delivery.

Step 5: Reporting & Accountability SOP

1. Weekly performance reports should include:
2. Outreach volume
3. Pipeline value
4. Deals in negotiation
5. Deals closed
6. Lost deals + reasons

7. Activities completed vs expected
8. Revenue forecast by individual BD executive
9. Red flags: slow follow-ups, inactive leads, overdue tasks
10. This is where real accountability begins.

TECHNOLOGY: Automate the boring stuff

Systems remove excuses.

You can automate:

- Follow-up reminders
- Pipeline stage updates
- Scheduling meetings
- Email sequences
- Management dashboards
- Activity logs
- Quote and invoice generation
- Lead Scoring
- Notifications when a deal is stuck too long

A lot of times "underperforming staff" are simply working for businesses that lack transparent systems. It doesn't mean there are not tools or some sort of system, but most likely these workflows and systems are existing in silos.

Performance becomes measurable when workflows are connected automated.

CULTURE SHIFT: Data over opinions

A powerful system immediately changes culture.

People move from saying:

"I think..."

to

"The CRM reveals...."

"I spoke to them."

to

"Here's the call log + follow-up notes."

"I am working on it".

to

Here is the timeline for the task and expected close date:

This is how our businesses can scale predictably.

HOW TO IMPLEMENT THIS SYSTEM IN YOUR BUSINESS

A simple but effective framework I use at my agency is:

- **Discovery**

Audit your current workflow, digital tools, and team habits.

- **Design**

Create SOPs, CRM workflow, pipeline stages, and lead lifecycle.

- **Build**

Setting up CRM, automation, templates, and dashboards.

- **Activation**

Train teams.

Onboard them into the new system.

Make CRM the center of operations.

- **Empower**

Weekly reviews, dashboards, refinements, accountability frameworks.

This is the process I'd use to help clients to build systems of growth that are both scalable and predictable.

FINAL THOUGHTS: We need better people; but we also need better systems

Talent succeeds within mechanisms.

Systems show who is performing.

Systems protect your business from loss, assumptions, and inefficiencies.

If every outreach, activity, follow-up, promise, and customer interaction is logged...

Accountability is natural and performance is measurable.

I believe a number of us are already implementing some of these tactics in some shape or form, and I hope this helps you to build more complete systems. Kindly share your thoughts and continue the conversation to build and grow our businesses.

