

Travel Geniuses

Tool Upgrade Worksheet



TOOL INVENTORY

Spend some time thinking about all of the tools you use in your business. This could be something as small as the notebook you use for brainstorming ideas, to your computer. Think about each one and rate it on a scale of 1-10 based on how it makes you feel.

Is it frustrating, always broken, and costing you a lot of extra time and energy to work with? Rate that a 1.

Do you love using it? Does it make you feel like a first class business owner? Then rate it a 10.

PHYSICAL TOOLS

TOOL	RATING

TOOL	RATING





SOFTWARE TOOLS

TOOL	RATING

TOOL	RATING

CLIENT FACING TOOLS

TOOL	RATING

TOOL	RATING





UPGRADE PRIORITY WORKSHEET

List all of the tools and resources that received a score of 5 or lower on the chart below, then rate them on a scale of 1 - 10. 1 is low priority, 10 is high priority. Add up your totals, and then use this as a reference when you're ready to invest in your business a bit more. This will help you invest in the RIGHT things, instead of just throwing money at things that aren't going to make as big of an impact on your business.

This is just a guide! Maybe money is a priority for you right now, so you may put more weight on tools that cost less to upgrade. Alternatively, if you never have enough time in the day, then you should put more weight on in the "time lost" column.

TOOL NAME	\$ to upgrade 1 = Expensive 10 = Nothing	Client facing? 1 = Never 10 = All the time	Usage 1 = Rarely 10 = Constantly	Time lost 1 = very little 10 = 10+ hrs/mo	Frustration level 1 = None 10 = Massive	TOTAL Higher number = higher priority



