

Small business operations checklist

A one-page self-check you can do in about 15 minutes. Tick what's already true today; the unticked lines are good candidates for your first improvements.

Processes

- ☐ The 3 to 5 tasks you repeat every week are written down as simple step-by-step lists.
- ☐ Someone other than you could complete your most common task using those steps.
- ☐ New customers or orders follow the same intake steps every time.
- ☐ You know which tasks only you can do today, and you have a plan to document at least one of them.

Roles and handoffs

- ☐ Every recurring task has one named owner.
- ☐ Handoffs (who passes what to whom, and when) are clear to everyone involved.
- ☐ There's one place where open tasks and their due dates are tracked.

Tools and systems

- ☐ You have a current list of the software you pay for, what each costs per month and who uses it.
- ☐ You've cancelled or combined tools that overlap or no longer get used.
- ☐ Passwords are kept in a password manager, not in documents or messages.
- ☐ Important files live in one shared, backed-up location.

Money and records

- ☐ Business and personal spending are in separate accounts.
- ☐ Invoices go out on a set schedule, and you know which ones are overdue.
- ☐ Receipts and records are saved as you go, not at the end of the year.
- ☐ You review income and expenses at least once a month.

Customers and follow-up

- ☐ Every inquiry gets a reply within a set time (for example, one business day).
- ☐ You follow up with leads who haven't replied, on a schedule.
- ☐ You ask finished customers for feedback and keep a record of it.

Weekly rhythm

- ☐ You set aside a short weekly review to check numbers, open tasks and the week ahead.
- ☐ You keep a running list of improvement ideas and pick one to work on each month.