

# Business Systems Checklist

Coaching Biz Growth Lab™

Use this checklist as you review your current business systems

**Topic:**

**Vehicle:**

**Scheduled for publishing (include dates):**

## Financial Systems:

- What needs updating?
- Cash Flow review
- Review sales
- Review expenses
- Invoicing
- Accounts Receivable
- Review cards and credit -what are rates like?

## Marketing Systems:

- Review website – about page
- Review website – current offerings up to date
- Marketing material up to date
- Marketing/promo material in stock (cards, post cards etc)
- Consider 15 – 20 different titles. Pick the best one.
- Graphics updated
- Identify how this will be shared? (i.e. other channels)
- Consider graphics
- Draft graphics
- Links are current?
- Social feeds up to date (FB, Instagram, Twitter, Linked In)

## Communication Systems:

- Include photo of you
- Schedule posts for Facebook
- Schedule posts for Instagram
- Schedule posts for \_\_\_\_\_
- Is the content mentioned in your newsletter?
- Let current clients know about the resource

## Client Systems

- Files up to date
- Logs up to date
- Agreements/letters
- One thing I said I would do...
- Onboarding materials
- Other: \_\_\_\_\_
- Other systems:
- Write down ideas and/or draft repurposing while it is fresh
- Back up completed
- Content created
- Networking
- Publishing
- Plans up to date
- Trackers up to date

## NOTES

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