PlanDoTrack.com

Start of Year/Quarterly Business Checklist

Use the following checklist to do a quarterly or beginning of year stocktaking:

- ☐ Client files updated
- ☐ Client Thank-yous
- ☐ Update of client log (ICF)
- ☐ CCEs listed and certificates available
- ☐ Major communications saved/printed (newsletter/blogs/articles etc.)
- ☐ Content Calendar - communications identified (newsletter/blogs/articles)
- ☐ Marketing Material inventory (brochures, flyers)
- ☐ Marketing material update and/or order
- ☐ Back-up of computer
- ☐ Filing of recordings for presentations
- ☐ All invoices paid
- ☐ Accounts receivable complete
- ☐ Accounts payable complete
- ☐ Invoice Listing for this year complete
- ☐ Bank Statements printed/filed
- ☐ Receipts filed
- ☐ Car log updated
- ☐ Inventory of products

- ☐ Office purchases
- ☐ Program reviews
- ☐ Website updates
- ☐ Next quarter program dates set
- ☐ Vision written down/reviewed
- ☐ Review of this year's successes
- ☐ Top 3-5 goals visible
- ☐ Inbox ready to go (clear and organized!)
- ☐ Professional learning goals identified and budgeted for
- ☐ Team meetings set
- ☐ Thanks to partners
- ☐ Speaking engagements identified and/or scheduled
- ☐ Aspirational goals and intentions set!
- ☐ One thing checked off the list from this year that kept getting carried forward!
- ☐ Project wrap up
- ☐ Quarterly taxes paid
- ☐ Other _____
- ☐ Other _____
- ☐ Other _____

NOTES

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