

Small Business Checklist

An ongoing checklist for running and managing an established small business.

Operations and admin

- ☐ Review and update standard operating procedures for key tasks.
- ☐ Check inventory or supply levels and reorder as needed.
- ☐ Confirm equipment and tools are maintained and working.
- ☐ Renew software subscriptions and review what you actually use.
- ☐ Back up business data and verify the backup is recoverable.
- ☐ Clear outstanding admin tasks and tidy your filing system.
- ☐ Review supplier performance and renegotiate terms where possible.

Finance and bookkeeping

- ☐ Reconcile bank accounts against your bookkeeping records.
- ☐ Send invoices promptly and chase overdue payments.
- ☐ Pay bills and suppliers on time to protect relationships.
- ☐ Review cash flow and forecast the next few months.
- ☐ Set aside funds for tax obligations as you earn.
Tax rules and rates vary by country and state — confirm with your authority.
- ☐ Compare actual income and expenses against your budget.
- ☐ Review pricing and margins to make sure you stay profitable.

Legal, insurance and compliance

- ☐ Confirm licenses and permits are current and renewed on time.
Requirements vary by jurisdiction — check your official government authority.
- ☐ Review business insurance coverage against your current risks.
- ☐ Keep contracts and key agreements organized and up to date.
- ☐ File required tax and regulatory returns by their deadlines.
- ☐ Check that data and privacy practices meet applicable rules.
- ☐ Document important records and store them securely.

Marketing and sales

- ☐ Review which marketing channels bring you the best customers.
- ☐ Publish fresh content or offers to stay visible to your audience.
- ☐ Update your website and listings with current information.
- ☐ Request and respond to customer reviews.
- ☐ Follow up with past customers to encourage repeat business.
- ☐ Track leads and conversion to see what's working.
- ☐ Plan promotions around upcoming busy or slow periods.

Customers and service

- ☐ Respond to customer enquiries and complaints promptly.
- ☐ Collect feedback and look for recurring issues to fix.
- ☐ Review service or delivery times and quality.
- ☐ Update FAQs and self-service resources for common questions.

- ☐ Reward or recognize loyal customers.

Team and growth

- ☐ Check in with team members and address any concerns.
- ☐ Confirm payroll and any benefits are processed correctly.
Employment obligations vary by jurisdiction — verify locally.
- ☐ Schedule training to close skill gaps.
- ☐ Review staffing levels against your workload.
- ☐ Set goals for the coming quarter and track progress.
- ☐ Identify one improvement to test and grow the business.