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.