

THE SOCIAL HIVE

THE BUSINESS OWNER'S 'GET YOUR SH*T TOGETHER' CHECKLIST

A no-bullshit checklist for getting your business organised, reducing admin and getting back to the work that actually matters.

1. INBOX

- Clear emails that need a response.
- Archive anything that no longer needs action.
- Create a simple system for Action Required / Waiting For / Clients / Finance.
- Flag anything you need to come back to.
- Unsubscribe from unnecessary emails.

2. CALENDAR & COMMITMENTS

- Review the next 2–4 weeks.
- Add missing meetings, deadlines and appointments.
- Block out focused work time.
- Remove or rearrange anything that is no longer necessary.
- Make sure meetings have the information you need beforehand.

3. FINANCE & ADMIN

- Check bookkeeping is up to date.
- Send outstanding invoices.
- Follow up overdue payments.
- Organise receipts and finance documents.
- Review upcoming payments and subscriptions.

4. CLIENTS & SALES

- Follow up unanswered enquiries.
- Check upcoming client appointments.
- Review outstanding client actions.
- Send any promised information.

- Update your CRM/client tracker.

5. FILES & SYSTEMS

- File important documents in the right place.
- Rename unclear files.
- Delete duplicates and outdated versions.
- Check your key templates are easy to find.
- Write down any process you repeatedly have to remember.

6. YOUR PRIORITIES

- Choose your top 3 priorities.
- Identify the one task that will move the business forward most.
- Move low-value tasks out of your own to-do list where possible.
- Decide what can wait, what can be delegated and what must be done by you.

THE SOCIAL HIVE TAKEAWAY

You don't need to be better at doing everything. You need a better system for deciding what deserves your time.

Need someone to take the admin off your plate? The Social Hive provides ongoing executive, virtual and business support so you can focus on running your business.