

ADMIN RELIEF CHECKLIST

Business Basics

- Business name and structure registered
- Templates for quotes, invoices, or emails
- Basic filing system
- Business email set up

Accounts Receivable

- Invoicing system
- Process for sending invoices
- Paid vs. unpaid invoice tracking
- Overdue payment - method to follow up

Accounts Payable

- System for receiving and organizing bills
- List of upcoming due dates
- Clear record of what's been paid and what's outstanding

Consulting

- Receipt saving method
- Expenses categorized
- Personal and business expenses kept separate

Payroll

- CRA payroll account set up
- Tracking method for contractor hours and invoices
- Payroll remittances understood

Digital Organization

- Digital Marketing Strategy
- SEO Optimized Website

QuickBooks

- Account Setup
- Monthly Maintenance + Support
- AR / PR Setup

Notes:

Bring this checklist to your consultation. It helps us see where you're starting from and what support will make the biggest difference for your business.