

# The Ultimate Business Reset & Organization Checklist

Now that the New Year is upon us, it's the perfect time to give your business the fresh start it needs!

We've got the ultimate guide to help you reset your business, purge the past year's clutter and worries, and set yourself up for success to achieve your business goals for 2022!

## WORKSPACE

Your physical workspace is an important factor when it comes to your productivity. Physical clutter, especially when there's too much, can be very distracting. When you can't find the things you need, it can also waste your precious time and energy.

### WORK DESK

- ☐ Throw out the clutter: used sticky notes, pieces of paper, empty pens, dusty business cards, etc.
- ☐ Put away: things you don't need, things that are distracting you, mugs you were too lazy to bring to the sink.
- ☐ Clean it: wipe your desk or disinfect it—you'll be surprised how much dirt and dust it gathered!
- ☐ Optimize it: Having a comfortable and ergonomic workspace can boost your productivity and help you prevent issues like back and neck pain, distractions, etc.
  - ☐ Find a more comfortable chair.
  - ☐ Laptop or desktop stand (your screen should be eye level.)
  - ☐ Noise-canceling headphones (game changer!)
  - ☐ Get a desk trash can.
  - ☐ Make sure your desk has ample light (helps improve focus.)
  - ☐ Assign a catch-all space for files that you receive but want to deal with later (like letters, receipts, etc. )

Resource: [Thomas Frank's Working From Home: How to Set Up Your Workspace](#)

## OFFICE

- ☐ Throw out the clutter: declutter or file away all the junk that is either not functional, taking up space, and as Marie Kondo says, “not bringing you joy.”
  - ☐ Your drawers and cabinets.
  - ☐ Your notebooks, pads, and other office supplies.
  - ☐ Your equipment: printer, spare cords (Seriously, no one needs an entire storage bin of them... it's not a right of passage!)
  - ☐ Your files: receipts, documents, notes, folders, etc.
- ☐ Reorganize your workspace— how can you make your work process more efficient? Should you move your printer closer to your desk? Or move your desk right in front of the window to let in more light?
- ☐ Organize.
  - ☐ Label your folders, files, and drawers.
  - ☐ Cables.
  - ☐ Supplies and equipment
- ☐ Make your workspace inspiring:
  - ☐ Decorate your space with inspirational quotes, pictures, etc.

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## DIGITAL WORKSPACE

Now that more and more businesses are going online and taking advantage of online tools, it's important to optimize your digital workspace too.

### EMAIL INBOX

- ☐ Unsubscribe from newsletters that you don't open or don't bring value to you anymore.
- ☐ Clean out your spam folder.
- ☐ Delete notification emails.
  - ☐ And if they just clutter your inbox, update your settings and unsubscribe from notification emails.
- ☐ Respond to emails that need your attention.
- ☐ Update your contact list (make sure the names, contact information, as well as other notes, are accurate.)
- ☐ Organize your email.
  - ☐ Create categories.
  - ☐ Optimize the layout so you see your most important emails first.
  - ☐ Create filters to automatically organize your messages once you receive them.



## DESKTOP

- ☐ Clear out the files, folders, or screenshots that are cluttering your desktop, or organize them into files.
- ☐ Only keep the folders and apps that you need to access often.

## ONLINE TOOLS

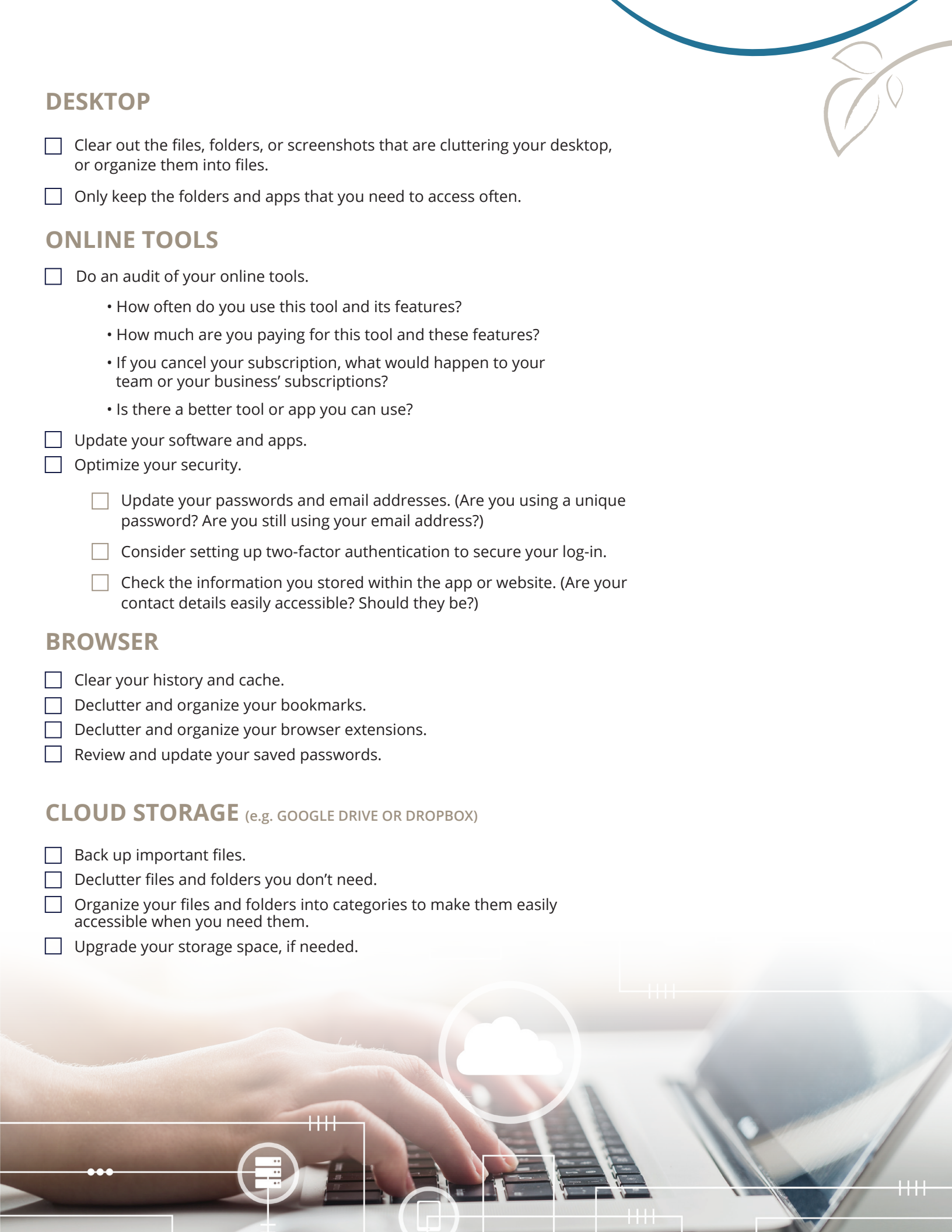
- ☐ Do an audit of your online tools.
  - How often do you use this tool and its features?
  - How much are you paying for this tool and these features?
  - If you cancel your subscription, what would happen to your team or your business' subscriptions?
  - Is there a better tool or app you can use?
- ☐ Update your software and apps.
- ☐ Optimize your security.
  - ☐ Update your passwords and email addresses. (Are you using a unique password? Are you still using your email address?)
  - ☐ Consider setting up two-factor authentication to secure your log-in.
  - ☐ Check the information you stored within the app or website. (Are your contact details easily accessible? Should they be?)

## BROWSER

- ☐ Clear your history and cache.
- ☐ Declutter and organize your bookmarks.
- ☐ Declutter and organize your browser extensions.
- ☐ Review and update your saved passwords.

## CLOUD STORAGE (e.g. GOOGLE DRIVE OR DROPBOX)

- ☐ Back up important files.
- ☐ Declutter files and folders you don't need.
- ☐ Organize your files and folders into categories to make them easily accessible when you need them.
- ☐ Upgrade your storage space, if needed.



## PASSWORDS AND SECURITY

- ☐ Review your log-in details from the websites you often visit, as well as websites you have forgotten about.

**Tip:** Try to scour your emails for sign-up messages from websites you've forgotten about. Search for phrases like "login, signing up, welcome, etc." If you no longer need your account, delete it or make your password more secure.

- ☐ Consider using a password manager app, such as LastPass.
- ☐ Consider setting up multi-factor authentication for websites and apps with important information, such as your email, cloud storage, and accounting software.

## DIGITAL FILES, DOWNLOADS & FOLDERS

- ☐ Go through your computer files and declutter old and unneeded files.
- ☐ Back up important files to the Cloud or on a hard drive.
- ☐ Install a cleaning and optimizing software, such as CleanMyMac X for Mac computers or CleanMyPC for Windows.
  - ☐ Run a scan for unnecessary files and cache.
  - ☐ Run a scan for harmful and suspicious files on your computer.
- ☐ Organize your files and folders, especially the ones you need access to or contain important information, such as client contracts, invoices, reports, etc.

## DIGITAL FILES, DOWNLOADS & FOLDERS

- ☐ If you're using a digital calendar, such as Google Calendar or Fantastical, delete recurring events, tasks, and reminders that are no longer relevant.
- ☐ Schedule future events, especially ones that you have with clients, your team, or other people, and share invites.
- ☐ Don't forget to schedule non-work events too, such as trips, to remind you while planning.
- ☐ Set reminders for payments, appointments, etc.

**Tip:** Set up systems that make your digital workspace more efficient and accessible. For example, create templates for things that you often send out to clients or your team, such as emails, quotes, or invoices.



☒ Remember me

[Forgot password](#)

LOGIN



# BUSINESS

An organized business is an efficient business. Now's the time to reset and make your systems more productive and useful.

## FINANCES

- ☐ Organize your receipts, invoices, as well as other important financial documents and reports.
  - ☐ Sort and categorize all your financial reports (profit and loss statement, payable and receivable reports, etc.) so it's easier to reference and review them later on.
  - ☐ Keep them in organized folders and make sure they are secured in a safe and clean space.
  - ☐ Scan financial documents and upload them to your organized Cloud Storage.  
**Tip:** Make sure to name them properly so they're easily searchable.
- ☐ Optimize your accounting software (And if you don't have one, consider setting up software like Quickbooks to help with your accounting.)
  - ☐ Organize your categories.
  - ☐ Make sure all the information is updated and accurate, such as your financial details.
  - ☐ Double-check your bank records to make sure they match the audit in your accounting software.

## PHYSICAL PRODUCTS

- ☐ Declutter or recycle outdated, expired, or damaged products.
- ☐ Take an ending & beginning year inventory for tax purposes.
- ☐ Organize products by category to make them easily accessible or by shelf life.
- ☐ Optimize your product storage.
  - ☐ If possible, clean your product containers or the space where you store your products.
  - ☐ Rearrange containers or products so your packaging system is more efficient.
  - ☐ Get new containers for products if your old ones are damaged or not efficient.

## CLIENT CONTRACTS

- ☐ Review your contracts and check if they are updated and accurate.
- ☐ Organize them in an accessible file system or folder (make sure they are in safe and clean spaces.)
- ☐ Scan them and save digital copies to your organized Cloud storage.



# MARKETING

An organized and more streamlined marketing strategy can help you reach more potential customers, collect more accurate data, and boost your business' online and offline presence.

## SOCIAL MEDIA

- ☐ Do an audit of your social media profiles.
  - ☐ Update your profiles, if needed. (Is your profile picture, cover pic, contact info, etc. up-to-date and accurate?)
  - ☐ Review your insights and make sure you're focusing on the right social media platform for your business. (Hint: you don't need them all— just the platforms that bring you meaningful traffic and help you build real relationships with your customers.)
  - ☐ Review your log-in details and other important information. If necessary, change your password to a more secure one and delete unnecessary information from your profile.
- ☐ Review and refresh your editorial/content calendar.
  - ☐ Schedule relevant holidays or events.
  - ☐ Review your content from the past year and determine the content that works with your audience. (Check out [this guide](#).)
  - ☐ Set a target for the next quarter.
  - ☐ Consider a digital system for easy backups and useful features. (Check out apps like Trello, Asana, Notion, or even Google Sheets.)
  - ☐ Automate your content posting.

## BUSINESS WEBSITE

- ☐ Review and update information.
  - ☐ Check your links to see if they lead to the correct sites.
  - ☐ Test your contact forms and linked emails to see if they still work.
  - ☐ Review your contact information, such as phone numbers, addresses, and e-mail.
  - ☐ Review your web pages for inaccurate information. (E.g. how many years have you been in business? Do you still offer the same services or products?)
  - ☐ Update bios and pics.
  - ☐ Review your website policies, such as your privacy policy, etc.
- ☐ Review your branding and give it a makeover, if needed.
  - Does your logo still match your business?
  - Are your colors still appropriate?
  - Does your website design still look good to you?
  - Does your company slogan still resonate with your business?



- ☐ Make sure the backend of your website is functioning properly.
  - ☐ Update your web host subscription, if needed.
  - ☐ Upgrade your storage, if needed.
  - ☐ Contact your web host to check for security issues.
  - ☐ Update current or remove outdated plug-ins.
  - ☐ Remove unnecessary users.
- ☐ Review and update your website content for SEO or Search Engine Optimization (Check out services such as Yoast or SEMrush.)
  - ☐ Enter your website URL on a platform and check if you're using the right keywords.

**Hint:** After the software assesses your website, it'll give you a list of the frequently used keywords throughout your site. If the list of keywords has nothing to do with your business or services, update your website content and copy so the right customers can easily find you online.

If you need help, you can also hire SEO specialists to assess and optimize your website with the right keywords.
  - ☐ Revise the copy on your Home, About, and Services pages.
  - ☐ If you have a blog, review your posts and update the information, if need be, especially links.

## EMAIL MARKETING

- ☐ Do an audit of your email marketing tools.
  - ☐ Review the features you've been using for your email marketing campaigns. Are they still useful? Do they make the process easier or do they complicate things?
  - ☐ Review your subscription, are you getting your money's worth? Do you need to upgrade to another plan?
  - ☐ Review your insights and numbers to plan your strategy for the next quarter.
- ☐ Update your email list and clear out cold contacts.
- ☐ Update your information and links.
- ☐ Review and update your templates.



## OTHERS

What other things can you reset and organize to help your business become more productive and efficient? Braindump notes and create your own checklist here.



The  
Biz Spa

