

Monthly Business Tasks

by Heart and Sola Coaching

YOUR WEBSITE

- ☐ Do all links work? None lead to incorrect pages or 404 errors.
- ☐ Check every page for errors. Reread everything, or ask someone else to.
- ☐ Check Google Analytics & Google Search Console for functionality and ideas.

ACCOUNTING

- ☐ Check credit card & bank statements.
- ☐ Did all transactions go through (money was taken from/deposited in your account)?
- ☐ Log & categorize all transactions in your bookkeeping software.
- ☐ Budget for upcoming expenses – monthly, yearly, bi-annual, subscriptions, etc.

ORDERS

- ☐ All orders have been fulfilled.
- ☐ Schedule time to complete remaining ones.
- ☐ Request reviews from last month's customers.
- ☐ Collect & organize last month's photos.
- ☐ Back up all of your files, photos, videos, etc.
- ☐ Make sure all upcoming orders, deadlines, and events are on your calendar.
- ☐ Follow up with any "ghost" customers.
- ☐ Purchase supplies for upcoming orders, launches, etc.

SOCIAL MEDIA

- ☐ Check that all links on your profiles work. If you reference things that are "linked in bio," make sure the link is actually there!
- ☐ Check Insights. Consider reposting your best-performing posts in a different format.
- ☐ Update your account performance tracker.
- ☐ Finalize your plan for this month's content.

INVENTORY

- ☐ Update with the past month's purchases.
- ☐ Update to reflect any used supplies.

EMAIL MARKETING

- ☐ Make sure all sign-up forms are working.
- ☐ Make sure any auto-replies are still sending & any files download correctly.
- ☐ Write & schedule at least one email to go out this month.
- ☐ Plan at least one social media post to get more subscribers this month.

ONLINE PROFILES/LISTINGS

- ☐ Check that all links are working correctly.
- ☐ Add any new photos or videos.
- ☐ Connect with other artists and vendors you've recently worked with.