



DAISY ADMIN SERVICES

Monthly Business Health Check

Small steps create a calm, successful business.

A monthly review to keep your business on track, organised and growing. Set aside 60-90 minutes once a month to check in, reflect and plan ahead.

1. Finance

- Review monthly income
- Check outstanding invoices
- Review expenses
- Check subscriptions & memberships
- Set revenue target for next month

2. Business Development

- Review Leads & Enquiries
- Check website enquiries
- Update testimonials
- Review networking opportunities
- Identify one potential collaboration

3. Marketing

- Review social media performance
- Review website analytics
- Check most popular content
- Plan next month's content themes
- Review email list/newsletter

4. Digital Organisation

- Archive completed projects
- Review file structure
- Check storage space
- Update key documents (templates etc)
- Declutter and remove unnecessary files

5. Business Continuity

- Update password records
- Review backup systems
- Check key business information is documented
- Review emergency contacts
- Consider any risks or gaps

6. You & Your Business

- How are you feeling
- What worked well this month
- What took too much time
- What can be simplified, delegated or outsourced
- What will be your focus next month

Pro Tip: Add a recurring monthly event in your calendar for your business healthcheck