

Small Business Digital Admin Checklist

A practical 10-minute check of the systems behind your business.

Use this to spot the one area causing the most friction - then fix that first.

Covers enquiries, files, communication, productivity, AI, automation, passwords, backups and continuity. No complicated tech stack required.

Made simple. Not dumbed down.

START HERE

Your 10-minute business systems check

Tick each statement that is already true. Leave the rest blank. The section with the most blanks is the best place to start.

Enquiries & clients

☐ Every enquiry has one record, one status and one next action.

Files & organisation

☐ Business files have one main home and a folder structure I can maintain.

Communication & productivity

☐ I have a reliable way to manage email, tasks and follow-ups.

Automation & AI

☐ I use automation or AI for repetitive admin without losing oversight.

Security & continuity

☐ Important accounts are protected and critical information is backed up.

My first priority: _____

Enquiries & Clients

A good enquiry system means nothing important lives only in your inbox or memory.

- ☐ Every new enquiry is captured in one central place.
- ☐ Each enquiry has a status such as New, Replied, Follow-up or Closed.
- ☐ Every open enquiry has a clear next action and date.
- ☐ Client information is kept separate from general email.
- ☐ I have a repeatable onboarding process once someone says yes.

Quick win

Create a simple enquiry tracker with columns for name, date, service, status, next action and follow-up date.

Files & Organisation

You should be able to find the right business document without searching three devices and two cloud services.

- ☐ I use one primary cloud location for business files.
- ☐ My top-level folders are simple and consistent.
- ☐ File names make sense without opening the document.
- ☐ Downloads and desktop clutter are cleared regularly.
- ☐ Old work is archived rather than mixed with active work.

Quick win

Create five top-level folders only: Admin, Finance, Clients, Marketing and Archive. Add more only when you genuinely need them.

Communication & Productivity

The goal is not inbox zero. It is knowing what needs attention and what can wait.

- ☐ I have one main task list or planner.
- ☐ Emails that require action are easy to identify.
- ☐ I use reusable templates for routine replies.
- ☐ I have a weekly admin review in my calendar.
- ☐ I can see outstanding follow-ups without rereading old messages.

Quick win

Pick one 30-minute weekly admin slot and use the same checklist every week.

Automation, AI, Security & Continuity

Use technology to reduce repetitive work, then protect the systems you rely on.

- ☐ I know which repetitive admin task I would automate first.
- ☐ I use AI for drafting or organising information, not final judgement.
- ☐ Important accounts use unique passwords and two-factor authentication.
- ☐ Critical business files have a separate backup.
- ☐ I know how I would regain access if my phone or laptop failed.

Quick win

Secure your main email account first: unique password, two-factor authentication and up-to-date recovery details.

WHAT NEXT

Do not fix everything at once

Choose the section with the most gaps. Spend one focused hour making that part of the business easier to run. Then repeat.

- 1 Choose one weak area.
- 2 Create one clear home for the information.
- 3 Write down the repeatable steps.
- 4 Set one weekly review time.
- 5 Only then decide whether you need another tool.

Ready for a complete setup?

The Small Business Digital Setup (£29) gives you a practical structure for the core tools and systems behind a small business - without overcomplicating the tech.

aurelledigital.com/guides/small-business-digital-setup