

Q1 INFRASTRUCTURE CHECKLIST

Sales and Marketing

- Q1 Sales and marketing plan ready to go
- Online presence audits—website, bios, pricing, social media profiles, photos
- Pricing review/increase (approach with a communications plan and use as marketing leverage)

Employees

- Gather feedback from employees / contractors
- Give feedback to employees / contractors
- Review employee / contractor contracts

Clients

- Customer appreciation efforts
- Review of client contracts and any trade agreements (value exchanging hands)
- Client milestone tracking (i.e. how working with you has positively impacted their life)

Technology

- CRM review/cleanup
- Electronic device backups
- Cyber security and data breach procedural review

Environment

- Annual office decluttering
- Physical inventory

Other

- Annual insurance policy review
- Review of leases
- Annual giveback plans
- Continuing education efforts
- Review and update policy and procedure manuals



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