



Spring Business Operations Refinement Checklist

Communication & Brand Consistency

- ☐ **Standardize branded email usage**

Confirm all client-facing communication is sent from your branded domain (no personal Gmail replies).

- ☐ **Review active inboxes**

Identify which inboxes are actively used and eliminate duplicates or outdated addresses.

- ☐ **Align sender names**

Ensure sender names clearly reflect your business or role (not nicknames or legacy titles).

- ☐ **Update and standardize email signatures**

Make sure signatures include current titles, contact details, links, and consistent formatting across your business.

Client Experience & Operations

- ☐ **Audit your client onboarding process**

Review how new clients are welcomed, onboarded, and guided through next steps.

- ☐ **Confirm onboarding consistency**

Ensure every client receives the same core information, regardless of who handles onboarding.

- ☐ **Create or refine a client welcome document**

Include expectations, communication norms, timelines, and points of contact.

- ☐ **Centralize FAQs and recurring answers**

Document commonly asked questions to reduce interruptions and repeated explanations.

Financial Systems & Bookkeeping Readiness

- ☐ **Review invoice templates for clarity**

Check layout, branding, payment terms, and service descriptions.

- ❑ **Confirm consistency between invoices and bookkeeping categories**

Ensure invoices align with how income is tracked in your books.

- ❑ **Identify recurring financial questions or issues**

Note where confusion or delays tend to happen (payments, documentation, reports).

- ❑ **Ensure bookkeeping workflows support current business volume**

Confirm processes are still efficient as transaction volume grows.



Systems, Scheduling & Capacity

- ❑ **Review calendar availability and scheduling links**

Confirm availability reflects current boundaries and capacity.

- ❑ **Check time zone accuracy and buffer times**

Avoid scheduling issues and back-to-back meetings.

- ❑ **Identify tasks that still require your direct involvement**

Highlight areas where delegation or operational support could reduce bottlenecks.

- ❑ **Document key workflows**

Outline recurring processes so they don't live only in your head.



Reflection & Next Steps

- ❑ **Identify friction points**

Note where things feel heavier, slower, or more manual than they should.

- ❑ **Prioritize what needs refinement — not reinvention**

Focus on tightening what already works.

- ❑ **Decide what support would make the biggest difference**

Consider whether operations, bookkeeping, or executive assistant support would free up the most capacity.
