



The Small Business Admin Reset Checklist

A simple guide to regaining control of your business admin.

How to Use This Checklist

This guide is designed to help you reset, organise and simplify your business admin.

Work through one section at a time, you do not need to do everything in one day.

Clarity creates calm. Let's begin.

SECTION 1: Inbox Reset

- Unsubscribe from unnecessary mailing lists
- Create folders:
 - Clients
 - Finance
 - Suppliers
 - Important
 - Flag or star urgent emails
 - Archive anything older than 3 months that isn't active
 - Set up 2–3 email rules/filters
 - Create a simple email signature
 - Schedule 2 fixed times per day to check emails

Goal: Inbox manageable and intentional — not reactive

SECTION 2: File & Document Organisation

- Create a clear folder structure (example below)

Main Folders:

- Clients
- Finance
- Marketing
- Legal



- Admin

- Rename unclear files
- Delete duplicate documents
- Store contracts in one secure location
- Back up important documents (Google Drive/Cloud)
- Create a naming system (Example: ClientName_Project_Date)

Goal: You can find any document within 30 seconds.

SECTION 3: Finance Basics

- Record all outstanding invoices
- Check unpaid invoices
- Log monthly expenses
- Separate business and personal transactions
- Set a monthly 'finance hour' in your calendar
- Ensure receipts are stored digitally

Goal: No financial surprises.

SECTION 4: Weekly Admin Routine

Choose one fixed admin block each week (EG: Friday 10:00 – 11:00).

During this time:

- Review inbox
- Update task list
- Check outstanding payments
- Schedule upcoming deadlines
- Review client communications
- Plan next week's priorities

Consistency reduces overwhelm.

SECTION 5: Task Clarity

- Write down everything currently 'in your head'
- Highlight tasks that only YOU can do



- Highlight tasks that could be delegated
- Identify recurring tasks
- Create simple step-by-step notes for repeated processes

Ask yourself:

- What drains my time?
- What delays my growth?
- What would I outsource first

SECTION 6: Systems & Tools Check

- Are you using one main calendar?
- Do you have a single task manager?
- Are client details stored in one place?
- Do you have clear onboarding steps?
- Do you know your next 30-day priorities?

If you answered 'no' to 3 or more — it may be time for structured support.

Reflection

Need Ongoing Support?

If you would like structured, reliable help managing your business admin, I offer ongoing virtual support packages designed to:

- Reduce overwhelm
- Create practical systems
- Protect your time
- Bring clarity to your operations

You do not have to manage everything alone.

www.clearpathvirtualassistance.co.uk