

CONTACT INFORMATION

Call or email today for a free consultation if you are ready to take the next step.

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BEST PRACTICES CHECKLIST FOR SMALL BUSINESS OWNERS

Use this checklist to evaluate your business and identify areas for improvement. Check off what you have already implemented and highlight what needs attention.

MINDSET & LEADERSHIP

- I envision myself as the CEO of my business, rather than merely an employee.
- I allocate time to focus ON my business strategy, not just IN the daily operations.

BUSINESS FOUNDATIONS

- I have selected the appropriate legal structure for my business (LLC, S-Corp, etc.).
- I keep my business and personal bank accounts separate.
- I have established written policies or procedures that direct my operations.

SYSTEMS & OPERATIONS

- I utilize tools and software to oversee tasks, scheduling, and financial management.
- I have established systems to simplify invoicing, billing, and customer relations.
- I maintain documented processes to ensure consistency and efficiency.

SCALING & GROWTH

- I have investigated various avenues to grow my business, including new products, services, or markets.
- As I grow, I prioritize ethical and sustainable practices.



MARKETING, MATH, AND MESSAGING

- I understand the problem that my business solves
- I know my target audience
- I have developed a profitability model.

FINANCIAL MANAGEMENT

- I know my monthly revenue, expenses, and profit margins.
- I strategically set my prices to guarantee profitability.
- I track cash flow and prepare for seasonal or unforeseen changes.
- I pay myself consistently from the profits of the business.

SELF-CARE & SUSTAINABILITY

- I establish boundaries to achieve a healthy balance between my business and personal life.
- I seek guidance from mentors, coaches, or peers who support my business growth.
- I have a strategy in place to prevent burnout and promote long-term success.