



BUSINESS WORKFLOW

checklist

Organizing Your Business is a critical factor in building a solid business. Although this can be challenging for most, it is also one of the key determinants for persons being successful in business or not. Below are five (5) areas that you must consider when organizing your business processes and workflows.

Contact us for more information: E: [@althea@beyondbananas.net](mailto:althea@beyondbananas.net)/[@blazingbeyond](https://www.instagram.com/blazingbeyond)

Product and Services Management

Know exactly which products/services you offer, how to describe them and to which groups of clients will you sell these to

Client Management

Your Clients can be grouped into three categories: Active, Warm Leads, Cold Leads. Know exactly who these clients are and where you can find them. Then organize your products/services and campaigns to meet them where they are. You can manage your clients at the different stages of their buying process in a tool or system that is suitable

Project Management

Be sure to group your work and activities into Projects. Know exactly what is required for you to do at the different stages of your Project Workflow. This should be documented and then implemented in your business

Document Management

Your documentation is your most critical pillar. You should know all the processes that centres around your client onboarding and off-boarding, your contracts, forms, emails etc.

Business Tools

Once you start the journey of owning your own business, you need to think through the best tools and applications (apps) that can help you to be functional and effective. E.g. To manage your invoices, client flow, communication etc.