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# Small Business Systems Starter Checklist

25 things every small business should have in place, in plain English.

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- ◆ Five quick wins in each of five areas
- ◆ No jargon, no fluff, work top to bottom
- ◆ Pairs with the Client Intake Tracker in this kit

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## The 25-item checklist

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### MONEY AND BOOKKEEPING

- ☐ 1. Open a separate business checking account so personal and business money never mix.
- ☐ 2. Pick one bookkeeping method, a spreadsheet or software, and stick to it.
- ☐ 3. Set one fixed day each month to reconcile income and expenses.
- ☐ 4. Save every receipt digitally and name each file by date and vendor.
- ☐ 5. Move a set percentage of every payment into a separate tax savings account.

### CLIENTS AND INTAKE

- ☐ 6. Use one intake form so every new client gives you the same details up front.
- ☐ 7. Confirm scope and price in writing before any work begins.
- ☐ 8. Send a short welcome message that sets expectations and the next step.
- ☐ 9. Keep one master list of clients with status, contact, and last touchpoint.
- ☐ 10. Define what done means for each service so projects actually close.

### GETTING PAID

- ☐ 11. Send the invoice the same day you deliver the work, not weeks later.
- ☐ 12. State your payment terms and late policy on every invoice.
- ☐ 13. Offer one easy way to pay, a card or a link, not five confusing options.
- ☐ 14. Schedule polite payment reminders at 7, 14, and 30 days.
- ☐ 15. Track which invoices are paid, pending, and overdue in one place.

### OPERATIONS AND SYSTEMS

- ☐ 16. Write your three most repeated tasks as simple step by step checklists.
- ☐ 17. Keep all templates, emails, contracts, and invoices in one labeled folder.
- ☐ 18. Back up your files automatically to the cloud, not just your laptop.
- ☐ 19. Use one calendar for everything and block weekly time for admin.
- ☐ 20. Each month, note one task a tool or template could handle for you.

## VISIBILITY AND GROWTH

- ☐ 21. Claim and complete your Google Business Profile with photos and services.
- ☐ 22. Ask every happy client for a review while the work is still fresh.
- ☐ 23. Keep a one line description of what you do, ready to paste anywhere.
- ☐ 24. Reply to every inquiry within one business day, even just to acknowledge.
- ☐ 25. Once a quarter, review what worked and do more of it.

Print this and check one item a day. In five weeks every core system in your business will be set up the right way. When you are ready to go deeper, the paid kits at [villexco.com](https://villexco.com) build the full versions of these systems.

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