



## Business Activities Inventory

Leverage this worksheet as an inventory for possible activities you may want to consider for your business as you systematize, get efficient, outsource, and delight clients.

Leverage this activity to brainstorm and add activities to your Get Efficient Worksheet.

Category	Activity	Category	Activity	
Marketing	Social Media	Sales	Salespage	
	Facebook Ads		Sales plan	
	Web Design		Scheduling Conversations	
	Copywriting		Sales Follow Up	
	SEO		Update CRM system	
	Business Cards		Executing sales plan	
	Other Print Materials		Service agreements signed	
	Writing Blogs		Client Services	Send welcome process
	Newsletter			Customer service
	Thank you cards			Standard responses
	Send warm letters	Delivering products		
Editorial Calendar	Delivering services			
Financials	Set up Webinars	Prepping for meetings		
	Send invoices	Scheduling client meetings		
	Track expenses	Operations	Posting blogs	
	Mange the books		Email management	
Budget	Operations Manual			

	Budget vs. Actuals		File management
	Revenue Forecast		Backing up files
	Payroll/Paying team		Legal considerations
	Collecting W-9s		Insurance
	Taxes		Business Scorecard/Metrics
Team	Hiring		Project Management
	Engagement		Networking Follow Up
	Roles & Responsibilities		Scheduling
	Orientation	Technology	Back up files
	Communication		Security