

Systems Checklist

by Jennifer Britton + Michelle Mullins – RemotePathways.com

	Communication Systems:	
Financial Systems:	Include photo of you	
Receipts in	Write + schedule posts for	NOTES
Cash Flow review	Social	
Review sales	Filing of important	
Review expenses	documents	
Invoicing	Key messages communicated	
Accounts Receivable	Client Systems:	
Review budget	Files up to date	
Marketing/Promotion Systems:	Logs up to date	
Review website – About page	Agreements/letters	
Calendars up to date?	Follow-up complete	
Marketing material up to date	Onboarding materials	
Marketing/promo material in stock (cards, post cards	Other:	
etc)	Other systems:	
Consider 15 – 20 different titles. Pick the best one.	Write down ideas and/or draft repurposing	
Graphics updated	Meeting Preparation	
Identify how this will be shared? (i.e. other channels)	Back up completed	
	Content created	
Draft Graphics	Networking	
Social feeds up to date (FB, Instagram, Twitter, Linked In)	Publishing	
	Plans up to date – Weekly/Monthly	

The Remote Pathways Podcast with Jennifer Britton and Michelle Mullins