

QUARTERLY BUSINESS BOOST

HOW TO USE THIS CHECKLIST TO
BOOST YOUR BUSINESS

✓ Give a tick to what you feel you have achieved

○ Circle what you think needs work and turn this into a 'To do' list

Quarterly Business Check-In

This checklist is designed to help you step back and make sure your business is set up to grow, generate income, and run efficiently.

It covers the key areas that impact sales and customer retention – from your brand and online presence to your marketing and systems.

As you work through it, don't just ask "Is this done?"

Ask: "Is this working?" and "Is this helping me make or save money?"

For example, your social media isn't just about being active – it should clearly communicate what you offer, who it's for, and make it easy for people to engage or buy.

Think of this as a working to-do list – something you can come back to and move through consistently, not just once.

Small improvements can drive big results.

This isn't about ticking boxes – it's about building a business that works smarter, not harder.

"Progress is built one step at a time."

QUARTERLY BUSINESS BOOST



BRAND & BUSINESS FOUNDATION

- Brand Identity:** Does your business have a clearly defined brand identity (logo, colours, fonts, etc.)?
- Mission & Vision:** Are your mission and vision statements clear and aligned with your business goals?
- Unique Selling Proposition (USP):** Are you consistently clearly defining what makes your business different from competitors?
- Business Model:** Is your pricing and sales approach set up to consistently generate revenue, or is there room to refine?
- Target Audience:** Are you
- attracting the right customer – or is there a gap between who you want and who you're reaching?

WEBSITE READINESS

If applicable

- Professional Design:** Does your website look professional, cohesive, and aligned with your brand?
- Mobile Optimisation:** Is your website mobile-friendly and responsive?
- Clear Call to Actions (CTAs):** Are there clear, visible CTAs to encourage conversions e.g purchase, contact, sign up?
- Sales Funnel:** Do you have a clear and simple process that guides customers from discovering your site to making a purchase?
- SEO Optimisation:** Have you implemented basic SEO strategies e.g., keyword optimisation, metadata?
- E-commerce Setup:** Is it easy for customers to shop and buy your products or services on your website? (IF APPLICABLE)
- Analytics Tracking:** Do you have Google Analytics set up to track how well your website is doing, like how many people visit or make a purchase?



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SOCIAL MEDIA STRATEGY

- Platform Selection:** Are you using the social media platforms where your customers are most likely to spend their time?
- Profile Optimisation:** Do your social media profiles have a clear bio, relevant links to your website along with high-quality images that represent your brand?
- Content Plan:** Do you have a content strategy or calendar in place for consistent posting?
- Engagement Strategy:** Are you engaging with your followers? regularly responding to comments, DMs, etc
- Hashtags & Tagging:** Are you using relevant hashtags and tagging people or businesses in your posts to help more people find your content?
- Advertising:** Do you have a plan for running paid ads e.g. Instagram /Facebook ads?
- Influencer or Partnerships:** Are you utilising influencer marketing or business collaborations to expand reach?

EDM STRATEGY

- Email List Setup:** Do you have an email list building strategy ie/ opt-in form, lead magnets?
- Email Platform:** Have you chosen an email marketing platform e.g., Hubspot, Mailchimp, ConvertKit, Klavio?
- Segmented Lists:** Is your email list segmented for better-targeted campaigns, new subscribers, loyal customers, etc. ?
- Automated Campaigns:** Have you set up automated email campaigns like welcome emails, abandoned cart, post-purchase follow-ups?
- Engaging Newsletters:** Are your newsletters informative, engaging, and aligned with your business goals?
- A/B Testing:** Are you testing different subject lines and email content to see which ones get the best response from your audience?

BUSINESS READINESS CHECKLIST



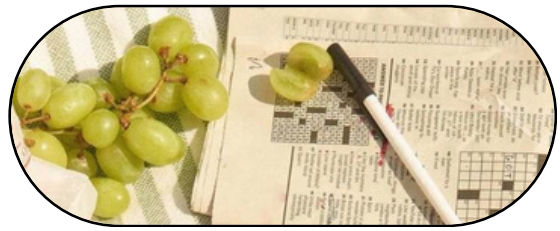
SALES & PAYMENT SYSTEMS

- Simple Checkout Process:** Is your checkout process quick and easy to use, reducing cart abandonment?
- Do you offer multiple payment methods?** Credit card, PayPal, Afterpay, etc to cater to different preferences?
- Sales Monitoring & Reporting:** Are you tracking sales across all channels?
- Data-Driven Decisions:** Do you use sales data in your website back end to help adjust your prices, special offers, and overall sales plan?
- Customer Service & Retention:** Do you offer excellent post-purchase support, returns, exchanges, follow-ups?
Have you implemented a customer loyalty program or referral incentives to drive repeat purchases?

CONTENT MARKETING & STRATEGY

- Value-Driven Content:** Are you creating content that educates, entertains, or solves problems for your target audience eg, blog posts, how-to guides, videos?
- Content Distribution:** Are you actively distributing your content across all appropriate channels? (social media, email newsletters, blogs)
- Content Repurposing:** Are you repurposing your content into multiple formats (e.g., turning a blog post into multiple social media posts, a video, infographics, or a podcast)?
- Are you re-sharing high-performing content regularly?

BUSINESS READINESS CHECKLIST



CUSTOMER JOURNEY & RETENTION

- Customer Onboarding:** Do you have a simple and welcoming process for new customers that helps them understand your product or service and how to use them to get the best results?

Do you offer exclusive content, discounts, or personalised follow-up to first-time buyers/clients to make them feel special?

- Customer Feedback & Engagement:** Are you actively seeking feedback via surveys or reviews and using them to improve your business?

Do you respond to customer inquiries and complaints promptly, offering solutions and ensuring customer satisfaction?

- Post-Purchase Follow-Up:** Are you following up after a purchase with thank-you emails or offers for repeat purchases?

Do you provide recommendations for related products or services?

BUSINESS OPERATIONS

- Team Setup:** Do you have a staff member or contractors in place? If so are roles clearly defined? Are you training and delegating?
- Project Management Tools:** Are you using any project management tools e.g., Asana, Trello, Google Keep or notes, to keep track of tasks and projects?
- Legal Requirements:** Are your business legal requirements in place e.g., business registration, tax, licenses?
- Accounting System:** Have you set up an accounting system to track expenses, income, and taxes e.g. HENRY, Xero? ***Did you know Global Sisters has an offer for HENRY?***
- Insurance:** Do you have business insurance in place to protect your assets and operations? ***Did you know Global Sisters can assist you with your business insurances?***

BUSINESS READINESS CHECKLIST



GROWTH & SCALING

- Partnerships & Collaborations:**
Are you building strategic partnerships with influencers, other brands, or businesses that share your audience?

Have you considered working on cross-promotions or collaborations that could help you grow your customer base?
- Marketing Channels & Diversification:**
Are you exploring multiple marketing channels e.g., organic social, paid ads, influencer marketing, partnerships?

Have you considered diversifying your product offerings to reach a broader audience or expand your customer base?
- Data-Driven Decision Making:**
Are you analysing sales data, customer feedback, and marketing performance to refine your strategies for growth?

Do you have a plan in place for scaling your operations as your business grows?

As you've worked through this checklist, take a moment to recognise what you've already built – and where there's opportunity to strengthen it. This isn't about doing more. It's about getting smarter with what you already have. Look closely at where your time, energy, and money are going.

Where can you simplify? Where can you reduce unnecessary spend?

And where is there untapped opportunity to bring in more income?

You don't need to overhaul everything, just focus on one area at a time.

Every small shift you make here is a step toward a more stable, sustainable, and profitable business.

THE END