



Sample Administrative Checklist from Business Class

Date: _____

For Clients

- _____ Prepare packets for new clients _____
- _____ Update client notes from meetings yesterday _____
- _____ Send follow ups from client meetings – within 24 hours of meeting _____
- _____ Answer phone/take messages – return client calls w/in 4 business hours. Others by end of day.
- _____ Write/respond to e-mails - return client emails within 4 hours. All others by end of day.
- _____ Prepare materials for workshops & meetings: _____
- _____ Calendar all due dates and appointments in Outlook.
- _____ Manage/update Contact files in Outlook
- _____ Send birthday, anniversary, wedding, baby cards/gifts according to schedule in Outlook.

Website Updates

- _____ Post articles and tips
- _____ Update database as needed.

Administrative

- _____ Process bill requests, invoiced, payment receipts.
- _____ Load printer and fax loaded with paper and ink.
- _____ Inventory, straighten and order supplies as needed
- _____ Take mail to mailbox before leaving each day.
- _____ Run errands _____
- _____ Run computer backup.
- _____ Run viruscan.
- _____ Straighten office each day before leaving.

Projects in Progress	Due Date	Status
1. _____	_____	_____
2. _____	_____	_____

Questions for Jan: