Small Business “Fix-It Day”

Accounts Receivable Cleanup:

Correct customer contact information

Create collection workflow

Create overdue aging report

Flag disputed invoices

Identify missing invoices

List unpaid invoices

Send approved reminders

Send statements

Set payment terms

Business Forms & Templates:

Customer complaint log

Customer intake

Employee onboarding

Equipment checkout

Estimate template

Expense reimbursement form

Incident report

Invoice template

Meeting notes template

Mileage log

Purchase order

Quote template

Vehicle inspection form

Vendor form

Weekly business checklist

Customer Follow-Up System:

Annual service reminder

Completed-job follow-up

Dormant customer reactivation

Estimate follow-up schedule

Maintenance reminder

Missed-call follow-up

New-lead follow-up

Repeat-customer reminder

Review request

Unpaid invoice follow-up

Customer Forms: Create or clean up:

Appointment confirmation form

Cancellation form

Change-order form

Contact information form

Customer authorization form

Customer complaint form

Customer follow-up form

Deposit/payment acknowledgment

Estimate request form

Job information form

New customer intake form

Project completion form

Review/feedback form

Service request form

Digital Systems:

Create standardized naming

Desktop folders

Dropbox

Email folders

Google Drive

OneDrive

Email / Inbox Cleanup:

Add booking/contact links

Archive old email

Create basic inbox workflow

Create canned responses

Create folders

Create labels

Create signatures

Flag high-priority messages

Identify unanswered customer inquiries

Separate bills/vendors/customers

Unsubscribe from obvious junk

Email Templates:

Appointment confirmation

Appointment reminder

Complaint response

Customer reactivation

Deposit request

Document request

Estimate follow-up

Estimate sent

Job completion

New employee welcome

New inquiry response

Past-due payment notice

Payment reminder

Reschedule notice

Review request

Thank-you

Vendor inquiry

Employee Paperwork:

Audit employee records

Direct deposit forms

Disciplinary documentation templates

Emergency contacts

Employee contact information

Employee handbook acknowledgment

I-9 completion status

Licenses/certifications

Missing paperwork list

New-hire checklist

Performance-review forms

Policy acknowledgments

PTO records

Termination checklist

Training records

W-4s

Expense Leak Check:

Bank fees

Credit-card fees

Duplicate charges

High merchant-processing fees

Late fees

Poor purchasing habits

Recurring charges

Software no one uses

Unnecessary delivery charges

Unprofitable services

Financial Management Setup:

Accounts receivable report

Basic KPI sheet

Cash reserve goal

Expense tracking

Monthly budget

Monthly financial review

Owner-pay process

Profit-by-service review

Tax savings process

Weekly cash snapshot

Google Business Profile:

Add appointment or booking links

Add business description

Add products/services where appropriate

Add services

Check for duplicate listings

Check map pin/location

Correct business name, hours, phone, website, and service area

Create a review-request link

Fix outdated information

Make sure contact information matches website/social media

Review unanswered customer reviews

Update categories

Upload/update photos

Filing & Document Systems:

1099 records

Bank statements

Contracts

Credit cards

Customer files

Employee files

Equipment records

Insurance

Job folders

Licenses

Payroll records

Receipts

Tax files

Vehicle records

Vendor files

W-9s

Inventory Systems:

Assign item numbers/SKUs

Calculate gross margin

Consumables

Create damaged/lost inventory tracking

Create inventory responsibility process

Create inventory spreadsheet

Create reorder sheet

Create weekly inventory count sheet

Equipment

Identify vendors

Materials

Parts

Record quantities

Set reorder levels

Tools

Track consumable supplies

Track equipment

Track purchase price

Track selling price

Payroll Process Cleanup:

Clean up employee payroll information

Create approval process

Create new-hire payroll checklist

Create payroll calendar

Create payroll checklist

Create payroll cutoff

Create payroll-change form

Create termination payroll checklist

Create timesheet system

Document payroll responsibilities

Document payroll schedule

Improve employee time submission

Organize PTO requests

Track bonuses

Track commissions

Track reimbursements

Phone / Customer Communication:

After-hours response

Business-hours message

Call intake script

Customer complaint procedure

Employee phone-answering script

Missed-call text

Quote request process

Voicemail greeting

Pricing & Service Sheets:

Clarify deposits

Clarify travel fees

Clean up pricing sheets

Create cancellation/no-show policies

Create estimate templates

Create good/better/best packages

Create internal employee pricing cheat sheet

Create minimum service charges

Create quote templates

Identify missing add-on opportunities

Make pricing easier for customers to understand

Remove confusing or outdated pricing

Standardize discounts

QuickBooks Cleanup:

Add payment terms

Clean up duplicate accounts

Correct invoice templates

Create basic financial reports

Create owner-friendly dashboard/report

Create products/services

Identify bookkeeping issues requiring deeper cleanup

Review chart of accounts

Review outstanding invoices

Review reconciliation status

Review recurring transactions

Review uncategorized transactions

Review unpaid bills

Set up bank feeds

Set up customers

Set up vendors

Scheduling System:

Color-code jobs

Create appointment reminders

Create appointment types

Create employee schedules

Create recurring appointments

Create travel buffers

Create waitlist

Establish scheduling rules

Organize service areas geographically

Set up cancellation process

Set up Google Calendar

Social Media Basics:

Add website links

Connect Facebook/Instagram where appropriate

Correct contact information

Correct hours

Create simple response templates

Make branding consistent

Pin important posts

Remove outdated information

Update business description

Standard Operating Procedures:

How to answer phone calls

How to close

How to close out a job

How to handle complaints

How to invoice

How to onboard employees

How to open the business

How to order supplies

How to prepare an estimate

How to process a new lead

How to run payroll

How to schedule a job

Security & Access Cleanup:

Check shared logins

Create access inventory

Enable two-factor authentication where appropriate

Establish unique user accounts

Identify who has admin access

Organize password manager

Remove former employees from systems

Review Google Business access

Review QuickBooks users

Review social media admins

Review website access

Subscription Audit: Review: Identify:

Accounting software

Apps

Cloud storage

CRM

Domain renewals

Duplicate subscriptions

Email marketing

Industry memberships

Internet

Old employee accounts

Phone services

Scheduling platforms

Services that could potentially be downgraded

Software

Streaming

Website hosting

Vendor Cleanup:

Create master vendor list

Document payment terms

Identify alternative suppliers to research later

Identify duplicate vendors

Identify recurring vendors

Organize vendor bills

Organize W-9s

Review subscription vendors

Track insurance certificates

Update contact information

Website Cleanup:

Add calls to action

Add FAQ section

Add Google review link

Add quote/request form

Add service descriptions

Add social links

Check contact forms actually work

Check mobile appearance

Correct hours

Correct phone number

Correct service area

Correct spelling/grammar

Fix broken links

Improve contact page

Remove outdated employees

Update outdated prices

Update photos

Update services