Business Documentation Checklist

The better organized your business is, the less time you'll spend hunting for things and re-inventing the wheel at every turn. That's where a documentation plan will help.

You don't have to overcomplicate it though. All you really need is a centralized location to store important documents and other information, and to take the time to maintain it.

- DOCUMENTATION LOCATION -

Ideally, you'll want to keep all your important documents in one central location, and if it's in the cloud, so much the better. That way you can access what you need from anywhere, and in the event of a computer crash, you won't be left scrambling.

I use and recommend one of the following:

- ☐ **Google Drive.** Lots of storage space, and easily shareable with others either on a file-by-file basis or with entire folders. Another advantage is that you can easily collaborate on documents, spreadsheets, and more. The disadvantage is that you must have an internet connection to access it, as the files are not on your local machine.
- ☐ **Dropbox.** Allows you to sync a folder on your computer with their cloud server, so copies exist in two places. That's convenient if you work offline a lot, but not ideal if you do a lot of collaborating with others, as the files can get out of sync.

- DOCUMENTATION TO MAINTAIN -

Eventually you'll want to have things like standard operating procedures—and we've already touched on that a bit in this course—but for right now you can start very simply:

- ☐ **Brand Board.** Keep this handy so you'll always know what font and color to use, and so you can share it with anyone who does any kind of design work for you, even if it's just formatting a blog post.
- ☐ **Project Checklists.** Anything you do more than once—format a blog post, upload a video, host a webinar—needs a checklist. Don't overcomplicate it. Just jot down the steps as you're doing it, put them on a Google or Word doc and title it appropriately. The next time you have to do that task, open up your checklist and follow along.

☐ **Preferences.** Do you want to make sure you always use the same size image in your blog posts, or that you always include the title in the featured image? Note these preferences down in your documentation.

- A WORD ABOUT PASSWORDS -

If you spend any time online at all, you likely have a lot of passwords to maintain. That number grow substantially as a business owner. Suddenly you have websites and servers and additional email accounts and software and all kinds of other things you didn't have to log into before.

Keeping all of those passwords straight can be difficult and—if you're not organized about it—a huge time suck.

I highly recommend you use a password manager not only to help keep passwords at your fingertips, but also for better security. There are many password managers available, but I use and recommend LastPass for a variety of reasons:

☐ **It's free.** Yes, they do have a paid tier, but for the vast majority of people, the free version is more than enough.

☐ **It allows you to easily share passwords.** You can share any number of passwords with other people, and even better, you can share passwords without the other person knowing what the password is. This is perfect when you need someone to log into your website for a quick task.

☐ **It's like a phone book for your browser.** You'll never have to remember another password again. Just open up LastPass, browse to the site you need, and click the link. LastPass will navigate to the site and log you in automatically. No more hunting for login details and wasting time resetting your password when you can't find them.