WEEKLY OWNER REVIEW

Your Weekly Business Checklist

A practical 15-minute routine. Check each action you complete.

Week of: _____ **Business:** _____

1 Leads & Inquiries

- [ ] Review all new customer inquiries.
- [ ] Identify customers waiting for a response.
- [ ] Schedule the next follow-up for each open inquiry.

2 Estimates & Quotes

- [ ] Review quotes that have not received a decision.
- [ ] Follow up on quotes that need attention.
- [ ] Confirm upcoming estimates and quote deadlines.

3 Jobs & Customers

- [ ] Review jobs scheduled for the next seven days.
- [ ] Check for missing job details or customer information.
- [ ] Identify delayed jobs or high-priority work.

WEEKLY OWNER REVIEW

Keep the Business Moving

Continue your review across payments, relationships, and marketing.

4 Payments

- [ ] Review unpaid invoices or payment records.
- [ ] Identify overdue payments and appropriate reminders.
- [ ] Record the next action and due date for each balance.

5 Reviews & Repeat Customers

- [ ] Identify completed jobs suitable for a review request.
- [ ] Check customers due for a relevant service reminder.
- [ ] Identify one appropriate repeat-business opportunity.

6 Marketing

- [ ] Review planned promotions or customer communications.
- [ ] Choose one realistic marketing activity for the week.
- [ ] Check results from the previous marketing activity.

WEEKLY ACTION PLAN

Turn Your Review into Action

Finish with a simple score and the three actions that matter most.

7 Owner Priorities

- [ ] Choose your three most important actions for the week.
- [ ] Assign a next step or date to each priority.

YOUR WEEKLY BUSINESS HEALTH SCORE

Count completed boxes across pages 1-3: _____ **out of 20**

My top 3 priorities this week

1. _____
2. _____
3. _____

One thing I can improve next week

START WITH WHAT YOU NEED. BUILD FROM THERE.

Explore focused tools at desksquire.gumroad.com