

End of Year Checklist
. . . or at least a place to start

For each item, determine the priority you assign to the task. Then determine the order in which you will execute, from highest to lowest priority.

<u>Task</u>	<u>Priority</u>	<u>Schedule</u>
File Management, cleanup – Online – Internal		
File Management, cleanup – Online – Clients		
File Management, cleanup – Paper – Clients		
File Management, cleanup – Paper – Clients		
Documentation Management, cleanup – Online – Internal		
Documentation Management, cleanup – Online – Clients		
Documentation Management, cleanup – Paper – Clients		
Documentation Management, cleanup – Paper – Clients		
Review Vendors for the next year		
Review Internal processes / SOPs		
- Creation		
- Execution		
Review marketing strategy		
Review insurance policies		
- Coverage		
- Beneficiaries		
Update Corporate (or Partnership) Minutes		
End of Year offsite backup		
Review finances overall		

<u>Task</u>	<u>Priority</u>	<u>Schedule</u>
Update employee Nondisclosure Agreements		
Annual reviews – all employees		
Update all employee information (W2, etc.)		
Distribute payroll calendar and holiday schedule		
Employee training schedule		
• Technologies: _____		
• Business/Strategy: _____		
• Online Courses: _____		
• Books/audio programs: _____		
Join / Renew membership in SBT Technology Community		
Review client contracts		
- How can these be more consistent and more profitable		
Evaluate clients		
- Weed your client garden		
Christmas/holiday cards		
Christmas/holiday gifts		
Client EOY Checklist		
• Change passwords		
• EOY backup		
• Schedule Technology Roadmap meetings		
• Clean up disc space		
• Clean up Outlook/Exchange		

Plan events for next year:

- CompTIA
- SMB TechFest
- ChannelPro SMB Forums
- ASCII Success Forums
- IT Owners Compass
- Channel Partners
- SMB IT Pros (Australia)
- Technology Marketing Toolkit (Robin Robins)
- Franchise-specific events
- Vendor-specific events
 - PSA
 - RMM
 - etc.

A few notes on what to shred and when:

In the U.S., the IRS generally does not audit records older than three years. So your base shredding target is anything older than three years. Having said that, there are circumstances when you can be audited up to seven years after filing in order to prove where you received income and how much you received. At a minimum, print out some basic reports and keep them for seven years.

Employee related documents of any kind should be kept at least seven years. Some can be shredded sooner, but to make this easier, I just keep them for seven. That way I have a three-year pile and a seven-year pile.

Bank statements, credit card statements, etc. should be kept for seven years. Note that your bank or credit card company will have downloadable versions of these available for a long time. Check to see how long they keep this information available. If it's seven years, feel free to shred your paper copies.

Permanently store everything related to corporate records, meetings, votes, partnership, etc. This includes all information related to creating the corporation (LLC, etc.). Also keep records of employee dates of employment.

Most government agencies accept electronic copies of everything. So you can scan everything and shred it as soon as you're sure the electronic files have been backed up.