

Digital Organisation Checklist



Achieve streamlined workflows and efficient digital management with these essential tasks.

1. Email Management

- ☐ Create categorised folders (e.g., Clients, Projects, Finance, Personal).
- ☐ Set up filters to automatically sort incoming emails.
- ☐ Unsubscribe from unnecessary newsletters and spam.
- ☐ Schedule regular inbox cleaning (weekly/monthly).
- ☐ Implement a “touch once” rule: act, file, or delete emails immediately.

2. File Organisation

- ☐ Create a clear folder structure (e.g., Business, Personal, Clients, Projects).
- ☐ Use consistent naming conventions for files.
- ☐ Set up cloud storage (e.g., Google Drive, Dropbox) for easy access and backup.
- ☐ Regularly archive old or completed projects.
- ☐ Automate backups for important files.

3. Task & Project Management

- ☐ Use a project management tool (e.g., Trello, Asana, ClickUp).
- ☐ Break down larger projects into smaller, actionable tasks.
- ☐ Set deadlines and priorities for each task.
- ☐ Regularly update your to-do list or task board.
- ☐ Sync tasks with your calendar for reminders.

4. Calendar & Scheduling

- ☐ Use a digital calendar for all appointments and deadlines (e.g., Google Calendar, Outlook).
- ☐ Set recurring events for regular meetings or tasks.
- ☐ Time block for specific activities (e.g., focused work, meetings, breaks).
- ☐ Enable reminders for important deadlines or events.
- ☐ Sync your calendar across all devices.

5. Password Management

- ❑ Use a password manager (e.g., LastPass, 1Password) to store and generate secure passwords.
- ❑ Update weak or duplicated passwords.
- ❑ Set up two-factor authentication for important accounts.
- ❑ Change passwords regularly (especially for sensitive accounts).
- ❑ Store recovery codes in a secure location.

6. Social Media Management

- ❑ Use a scheduling tool (e.g., Buffer, Hootsuite) to plan and automate posts.
- ❑ Keep all social media content organised by platform and campaign.
- ❑ Monitor and engage with comments and messages regularly.
- ❑ Perform a quarterly audit of accounts to update passwords, profiles, and goals.
- ❑ Archive older campaigns for future reference.

7. Software & Tools Organisation

- ❑ Audit your software tools regularly and eliminate unused ones.
- ❑ Consolidate tools where possible (e.g., use one app for multiple functions).
- ❑ Check for and install updates regularly.
- ❑ Organise and document licenses, subscription dates, and renewal alerts.
- ❑ Back up settings and preferences for key tools.

8. Client & Business Administration

- ❑ Use a CRM system (e.g., HubSpot, Zoho) to keep client information organised.
- ❑ Centralise communication logs, notes, and files for each client.
- ❑ Create templates for commonly used documents (e.g., proposals, contracts, invoices).
- ❑ Organise all financial documents in one location (e.g., receipts, invoices, taxes).
- ❑ Regularly audit and clean up client files.

For questions or to learn more reach out to us!

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