



7-Day Business Digital Reset Workbook

Organize for the Business You Are Becoming

This workbook will help you simplify and strengthen the digital systems you rely on to run your business - from email, files, and calendars to client information, finances, templates, and recurring reviews.

The goal is simple: fewer places to look, clearer systems, and repeatable workflows that make your business easier to manage.

It is designed for small business owners, whether you run a service-based or product-based business, are just getting started, or are building for the next stage of growth.

What You Will Put in Place

- 1** One clear home for each core business function
Know which tool or system to trust for each type of information.
- 2** Practical digital standards
Use simple rules for files, follow-ups, and records so they stay easier to manage.
- 3** Repeatable business routines
Create a few habits that help important work stay visible and consistent.

"The key is not to prioritize what's on your schedule, but to schedule your priorities."
- Stephen R. Covey

How to Use This Workbook

1 One business focus at a time

Work through the days in order when you can. Each one addresses a different part of your digital setup.

2 You are not building a perfect tech stack in a week.

Focus on the decisions that will make day-to-day work easier. Most resets are designed to take about 15-45 minutes, but that is only a guideline. Take the time you need.

3 Document what you decide

Use the notes sections to record the choices you want to remember, such as naming rules, review routines, or follow-up standards.

4 Move at your own pace

The seven days are a sequence, not a deadline. If your schedule is full, spread the work over two or three weeks. A system you can maintain matters more than finishing quickly.

Author's Note

A growing business should not depend on memory, scattered apps, or one-off workarounds. This reset builds clear digital homes and repeatable operating habits that make the business easier to run, hand off, and scale - whichever business model or stage you're in.

QUICK GLOSSARY

Business anchor	The main tool or system you use for a business function, so you know where to look first.
Source of truth	The version you treat as current and reliable when information about the same thing appears in more than one place - for example, the one folder you trust over an old download or an email attachment.
CRM	Customer Relationship Management system - a tool used to track leads, clients, and communication history. Examples include HubSpot, Dubsado, HoneyBook, or a well-maintained spreadsheet.
SOP	Standard Operating Procedure - a written step-by-step process for work you repeat, so the process is easier to follow consistently or hand off to someone else.
Bookkeeping / invoicing system	The system you use to track income and expenses and manage invoices or payments. Examples include QuickBooks, Wave, and FreshBooks.
Service-based business	A business that primarily sells expertise, time, or services to clients rather than physical products. Examples include consultants, organizers, designers, coaches, accountants, and photographers.
Product-based business	A business that primarily sells physical or digital products to customers. Examples include retail shops, e-commerce businesses, makers, publishers, and businesses that sell downloadable products.

Your 7-Day Roadmap

Use this page to see the full arc of the reset at a glance, and to check off each day as you complete it. Come back here anytime you want to jump to a specific day.

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- ☐ **Day 1** **Map Your Business Anchors** • 30-45 min
Identify where each core business function currently lives.
-
- ☐ **Day 2** **Build Your Business Folder Structure** • 20-30 min
Create folders and a naming standard that make files easy to find.
-
- ☐ **Day 3** **Create a Business Inbox Workflow** • 25-35 min
Turn email into a processing system instead of a to-do list.
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- ☐ **Day 4** **Audit Business Apps, Notifications & Access** • 20-30 min
Reduce interruptions and secure the accounts your business depends on.
-
- ☐ **Day 5** **Create Reusable Business Templates** • 25-30 min
Stop rebuilding the same documents and emails from scratch.
-
- ☐ **Day 6** **Set Up Your Weekly Business Review** • 30-45 min
Build a recurring checkpoint for leads, finances, and priorities.
-
- ☐ **Day 7** **Review, Reset & Decide What Comes Next** • 20-30 min
Close loose ends and choose what to improve next.
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TIP: A one-page quick-reference version of all seven days is included at the end of this workbook (after Day 7) - use it for your recurring monthly Business Systems Reset so you don't need to re-read the full workbook each time.

DAY 1 Map Your Business Anchors

30-45 min

Identify where each core area of your business lives today. The goal is to understand your current setup before you start changing tools.

ANCHOR TRACKER - mark each area as you go

Business Area	KEEP	CONSOLIDATE	NEEDS A DECISION
Email inbox	☐	☐	☐
File storage	☐	☐	☐
Calendar	☐	☐	☐
Tasks & follow-ups	☐	☐	☐
Leads / clients (CRM)	☐	☐	☐
Bookkeeping & invoicing	☐	☐	☐

TODAY'S BUSINESS CHECKLIST

- ☐ Identify the business email inbox you currently use
- ☐ Identify where your business files are currently stored
- ☐ Identify the calendar you currently use for business commitments
- ☐ Identify where you currently track tasks and follow-ups
- ☐ Identify where you currently track leads, clients, and relationship information
- ☐ Identify the system you currently use for bookkeeping, invoicing, and payments
- ☐ Mark each anchor: KEEP / CONSOLIDATE / NEEDS A DECISION

Quick gut-check: If it takes you more than about two minutes to find something in a given area, or you aren't sure which version is current, mark it **CONSOLIDATE** or **NEEDS A DECISION** rather than **KEEP**.

SERVICE-BASED VS. PRODUCT-BASED TIP

Service-based: Use the six anchors above as your core operating map.

Product-based: If you manage physical inventory, note where it lives today (spreadsheet, storage platform, or inventory app). Day 2 will give it a proper home.

REFLECTION PROMPT

Which of these six areas feels the least clear right now? If you improved only one, which would save you the most time or prevent the most missed details?

MY BUSINESS NOTES / STANDARDS

List current tools, overlaps, gaps, and the ONE system you want to clarify first...

DAY 2 Build Your Business Folder Structure

20-30 min

Create a folder structure and naming standard that make business files easier to find, share, and archive.

TODAY'S BUSINESS CHECKLIST

- ☐ Create one top-level folder for your business in cloud storage
- ☐ Add core folders that match your business model (see tip below)
- ☐ Move active business files into the appropriate folders
- ☐ Create a file-naming standard (for example: YYYY-MM-DD_Client_Document)
- ☐ Archive outdated or duplicate business files instead of leaving them in active folders

SERVICE-BASED VS. PRODUCT-BASED TIP

Service-based: Operations, Clients, Finance, Sales & Marketing, Legal, Templates.

Product-based: Operations, Inventory & Suppliers, Finance, Sales & Marketing, Legal, Templates.

Use whichever set matches how you actually work - or blend both.

REFLECTION PROMPT

Choose one business file you often need to find quickly. Where should it live, and what naming rule would make it easier to find next time?

MY BUSINESS NOTES / STANDARDS

Capture folder names, file-naming conventions, archive rules, or files that still need a clear home...

Naming rule for your source of truth: when the same document exists in more than one place (a downloaded invoice, an email attachment, a signed copy), decide which folder location is the one you'll trust, and treat every other copy as a duplicate to archive.

DAY 3 Create a Business Inbox Workflow

25-35 min

Use your business inbox for communication and move files and action items to the systems where they belong.

TODAY'S BUSINESS CHECKLIST

- ☐ Create a simple processing structure: Action, Waiting, Reference, and Archive
- ☐ Unsubscribe from low-value business newsletters and promotional email
- ☐ Archive or delete messages you no longer need for business records
- ☐ Move follow-up commitments into your task manager or CRM
- ☐ Set one or two intentional times each workday to process business email

REFLECTION PROMPT

Think about the last few emails that required action. Where did you track those follow-ups? What would make that process more reliable?

MY BUSINESS NOTES / STANDARDS

Note your email processing times, folder/label rules, follow-up workflow, or unsubscribe targets...

DAY 4 Audit Business Apps, Notifications & Access

20-30 min

Review the apps, alerts, and access points that interrupt your work or make it harder to know which tool to use.

TODAY'S BUSINESS CHECKLIST

- ☐ Turn off non-essential notifications in business apps and collaboration tools
- ☐ Identify overlapping software and choose the primary tool for each function
- ☐ Clear business files from your Desktop and Downloads folder into their proper homes
- ☐ Organize business browser bookmarks into a few clearly labeled folders
- ☐ Use a password manager and confirm that critical business accounts have secure, backed-up access

REFLECTION PROMPT

Which app or notification interrupts you most often during the workday? What can you turn off, consolidate, or change today?

MY BUSINESS NOTES / STANDARDS

Record apps to remove or consolidate, notification changes, bookmark categories, or access/security follow-ups...

Pace note: if a password manager isn't set up yet, treat that item as its own follow-up task rather than finishing it inside today's time window - secure account access is worth doing right, even if it spills into another day.

DAY 5 Create Reusable Business Templates

25-30 min

Create a few reusable templates for work you do often, so you are not starting from scratch each time.

TODAY'S BUSINESS CHECKLIST

- ☐ Create a reusable client inquiry or discovery follow-up email
- ☐ Create or refine your core sales document (see tip below)
- ☐ Create a standard client/project (or order/product) folder template with repeatable subfolders
- ☐ Create one recurring checklist or SOP for a common business process
- ☐ Store all approved templates in one clearly labeled Templates folder

SERVICE-BASED VS. PRODUCT-BASED TIP

Service-based: A proposal, estimate, or service agreement template.

Product-based: An order confirmation, shipping/return policy, or product listing template.
Pick whichever document you rewrite most often from scratch.

REFLECTION PROMPT

What document, email, or process do you recreate most often? Which one would be most useful to turn into a reusable template first?

MY BUSINESS NOTES / STANDARDS

List templates to create, naming/version rules, repeatable checklists, or SOPs you want to document...

DAY 6 Set Up Your Weekly Business Review

30-45 min

Build a weekly review you can realistically maintain to stay on top of leads, client work, finances, files, and priorities.

TODAY'S BUSINESS CHECKLIST

- ☐ Block a recurring 30-45-minute Weekly Business Review on your calendar
- ☐ Review active leads, client commitments, and outstanding follow-ups
- ☐ Check your bookkeeping/invoicing system for payments due, sent, or overdue
- ☐ Close or archive completed projects and file final documents
- ☐ Choose your top three business priorities for the coming week

REFLECTION PROMPT

What is most likely to slip through the cracks in a busy week - a lead, invoice, deadline, file, or follow-up? Add that item to your weekly review.

MY BUSINESS NOTES / STANDARDS

Note your review day/time, recurring checkpoints, overdue follow-ups, or rules for choosing weekly priorities...

DAY 7 Review, Reset & Decide What Comes Next

20-30 min

Review what has changed, close any loose ends, and decide which business system needs attention next.

TODAY'S BUSINESS CHECKLIST

- ☐ Review Days 1-6 and finish any business system decisions that remain open
- ☐ Write down the one change that reduced the most friction during this reset
- ☐ Identify the next business workflow that needs better structure
- ☐ Choose one process to standardize, automate, or delegate next
- ☐ Schedule a recurring monthly Business Systems Reset on your calendar

REFLECTION PROMPT

What is noticeably easier or clearer in your business now than it was at the start of this reset?

MY BUSINESS NOTES / STANDARDS

Capture the system that helped most, remaining friction, and what you will standardize, automate, or delegate next...

Monthly Business Systems Check-In

Use this single page for your recurring monthly Business Systems Reset, once you've completed the full workbook at least once.

Day	Focus	One thing to check monthly
1	Business Anchors	Any anchor now marked CONSOLIDATE or NEEDS A DECISION?
2	Folder Structure	Anything sitting outside its proper folder or unarchived?
3	Inbox Workflow	Is Action/Waiting/Reference/Archive still being used?
4	Apps & Access	New overlapping tools or notifications to silence?
5	Templates	Any new recurring document worth turning into a template?
6	Weekly Review	Still on the calendar? Still being kept?
7	Next Priority	What's the next workflow to standardize, automate, or delegate?

MY BUSINESS NOTES / STANDARDS

This month's monthly-reset notes - what changed, what still needs attention...

You Have a Clearer Digital Foundation

The goal is not to add more technology.

It is to make your existing systems easier to understand and use.
Keep what is working, improve what is not, and revisit your systems as your business grows.

END-OF-RESET BUSINESS REFLECTIONS

What system now makes your business easier to run?

Which workflow needs more structure as your business grows?

What does your bookkeeping/invoicing system help you see more clearly now?

What will you standardize, automate, or delegate next?

YOUR NEXT STEPS

- Keep your monthly Business Systems Reset on the calendar
- Add important invoice and payment dates to the calendar or reminder system you already use
- Revisit this workbook when a process starts feeling harder than it should
- Write down important system decisions before adding another tool



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