

✦ Creative Business Essentials Checklist ✦

 (Organized by Notion Dashboard Sections)

Planning & Scheduling

- ☐ Weekly Planner — Plan your days, to-dos, and priorities
- ☐ Monthly Overview — Track deadlines, launches, and project milestones
- ☐ Content Calendar — Schedule your social media, blog, newsletter, etc.

Client & Project Management

- ☒ **Client Pipeline Database**
 - ☐ Client contact info
 - ☐ Project details
 - ☐ Status (lead / in progress / completed)
 - ☐ Feedback & testimonials
 - ☐ Follow-up reminders
- ☒ **Project Dashboard**
 - ☐ Active project list
 - ☐ Deadlines & deliverables
 - ☐ Creative brief / reference links
 - ☐ Status tracking (e.g., to do / in progress / done)

Finance & Admin

- ☒ **Invoice & Quote Tracker**
 - ☐ Invoice number & date
 - ☐ Client name & project
 - ☐ Amount
 - ☐ Status (sent / paid / overdue)
 - ☐ PDF file attached
- ☒ **Accounting Notes**
(if done manually, you can still link a scan)
 - ☐ Income tracker
 - ☐ Tax preparation notes

Business Strategy

- ☒ **Business Dashboard**
 - ☐ Annual goals
 - ☐ Brand deck
 - ☐ Mission & vision
 - ☐ Legal documents (e.g. contracts, terms, etc.)
 - ☐ Pricing strategy

Content Creation

- ☒ **Content Dashboard**
 - ☐ Newsletter drafts & schedule
 - ☐ Social media content planner
 - ☐ Blog article tracker
 - ☐ Script writing or captions
 - ☐ Analytics overview *(optional)*

Shop & Product Management

- ☒ **Product Database**
 - ☐ Product name & description
 - ☐ Launch dates
 - ☐ Inventory tracking
 - ☐ Order status
 - ☐ Production files & mockups

Creative Flow & Ideas

- ☒ **Brain Dump Space**
 - ☐ New project ideas
 - ☐ Inspo links or moodboards
 - ☐ Random thoughts / future plans
 - ☐ Wishlist of future offers or products

Optional Extras

- ☐ Moodboard Page (visuals and branding inspo)
- ☐ Reading/Resource (business creative dev)
- ☐ Client Questionnaire Template to duplicate
- ☐ Recurring Tasks Database (habits, weekly admin)

More on emelinepommery.com

What matters most isn't which app you choose, but that it actually **works** for your brain and workflow.

Start with the basics — planning, tracking clients and finances, and a way to store your creative ideas — and build from there.

But First, Coffee!



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Art Business Toolkit: The Software I Use to Run My Creative Business

