



FREE CHECKLIST

monday.com for SMBs: Smart Setup Checklist

What to decide and check when you set up or clean up monday.com, so your team actually uses it and the data stays useful.

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HOW TO USE THIS CHECKLIST

Most monday.com accounts don't fail because of the platform. They fail because boards multiply without a plan, columns mean different things to different people, and nobody owns the setup after launch.

Use this checklist when you first set up monday.com, or when you clean up an account that has grown messy. Work through the areas in order: the early decisions make the later ones easier. Tick what's done, and write a name next to anything that needs an owner.

Tip: features, limits and admin controls vary by plan, and the platform changes often. Before you design around a feature, confirm it's included in your plan and check monday.com's own help documentation for how it works today.

1. Plan before you build

- ☐ We've listed the two or three processes monday.com will run first (for example sales pipeline, client projects, onboarding).
Start narrow. Add departments once the first boards work well.
- ☐ Each process is mapped on paper: the stages, who does what, and what "done" means.
- ☐ We've named an account owner (admin) and a backup.
- ☐ Each first process has a business owner who decides how its board works.
- ☐ We know which existing tools monday.com replaces, and which it needs to connect to.
- ☐ We've agreed what leadership needs to see, so boards capture the right data from day one.

2. Workspace and board structure

- ☐ Workspaces follow a simple pattern, such as one per department or one per major function.
- ☐ Folders inside each workspace group related boards so people can find them.
- ☐ Each process has one main board, not a copy per person or per month.
Use groups, filters and views to slice one board instead of cloning it.
- ☐ Groups reflect something stable, such as stage, quarter or team.
- ☐ Columns are limited to what the team will actually fill in and use.
- ☐ Each column type matches its data: status for stages, dates for deadlines, people for owners, numbers for amounts.

- ☐ Board templates exist for anything you create repeatedly, such as a new client project.
- ☐ Saved views are set up for common needs: "my work," "due this week," "overdue."

3. Naming conventions

- ☐ Workspaces, folders and boards follow a written naming pattern (see the starter below).
- ☐ Item names follow a pattern too, so search and sorting work. For example, client name then project.
- ☐ Status labels are the same across similar boards, with the same colors meaning the same thing.
- ☐ Column names are plain and specific ("Contract signed date," not "Date 2").
- ☐ Archived or old boards are clearly labeled or archived, not left looking active.

Naming convention starter

Level	Pattern	Example
Workspace	Department or function	Sales · Delivery · Operations
Folder	Area within the workspace	Sales › Pipeline and Clients
Board	Function – Purpose	Delivery – Client Projects
Item	Client or subject – Short description	Example Co. – Website migration
Status labels	Same set and colors on similar boards	Not started · Working on it · Waiting · Done

4. Permissions and guests

- ☐ Only a small number of people hold admin rights.
- ☐ Each board has a named owner responsible for its structure.
- ☐ Board privacy is set on purpose for each board, using the options your plan provides.
Decide which boards everyone can see and which are limited to a team.
- ☐ Sensitive data (pay, HR matters, client financials) sits on restricted boards, or stays in the system built for it.
- ☐ Guests (clients, contractors) see only the boards they need, and we've checked what a guest can see before inviting one.
- ☐ There's a routine for removing people and guests when they leave or a project ends.

- ☐ Login security, such as single sign-on or two-factor authentication, is set up as your plan allows, with your IT or security provider involved.

5. Automations and integrations

- ☐ Each automation solves a specific, repeated manual step. If nobody can say what it saves, it doesn't need to exist.
- ☐ Start with simple automation recipes: notify an owner, move an item when its status changes, set a due date, create a follow-up task.
- ☐ Automations are listed somewhere the team can see: what each does, on which board, and who owns it.
- ☐ Integrations with email, calendar, CRM, accounting or forms are planned so each piece of data has one source of truth.
Decide which system wins when the same data lives in two places.
- ☐ For multi-step workflows across several systems, you've considered a dedicated integration platform rather than stacking many board automations.
- ☐ Usage limits on automations and integrations for your plan are known and checked monthly.
- ☐ Each automation and integration was tested with real examples before the team relied on it.
- ☐ Any integration that shares client or confidential data has been reviewed with your IT or security provider.

6. Dashboards and reporting

- ☐ Each dashboard answers specific questions for a specific audience (leadership, a team lead, a client).
- ☐ Dashboards pull from the main boards, not from side copies.
- ☐ Metric definitions are written down: what counts as "won," "late" or "active."
- ☐ Leadership has one dashboard they check weekly, and it's reviewed in a standing meeting.
- ☐ Unused dashboards are archived so the useful ones stay easy to find.

7. Data hygiene

- ☐ Required columns (owner, status, due date) are filled in on every active item.
- ☐ Forms or integrations bring new requests in, instead of people retyping emails.

- ☐ Duplicate items and boards are merged or archived on a regular schedule.
- ☐ Finished items are moved to a "done" group or archived so active views stay short.
- ☐ Data imported from spreadsheets or old tools was cleaned before import, not after.
- ☐ Someone runs a monthly check: items without owners, overdue items, stale boards.
- ☐ Data you need to keep is exported or backed up in line with your records rules.

8. Training and adoption

- ☐ Each team gets a short session on its own boards, not a general tour of every feature.
- ☐ A one-page guide per board explains what it's for, the columns and the rules.
- ☐ New hires learn the boards as part of onboarding.
- ☐ Updates and comments happen on items in monday.com, instead of in side email threads.
- ☐ Each team has a go-to person for questions.
- ☐ Leaders use the boards in meetings. When the boss asks "what does the board say?", adoption follows.
- ☐ After the first month, you've asked users what's awkward and fixed it.

9. Governance

- ☐ There's a simple rule for who can create new workspaces and boards, and how requests are made.
- ☐ Changes to shared boards, columns or automations go through the board owner.
- ☐ The account owner reviews structure, users, guests and automations every quarter.
- ☐ Licenses are reviewed regularly so you pay only for active users.
- ☐ The setup decisions in this checklist are written down and kept somewhere the team can find them.

Common setup mistakes

A board for everything

Dozens of near-identical boards. Nobody knows which one is current, and reports don't add up.

Copying the old spreadsheet

Moving every column across as-is. Rebuild around the process, not the old file.

Automating too soon

Adding automations before the process settles. Run it by hand for a few weeks first.

Guests seeing too much

Inviting clients without checking what's visible to them. Test with a guest account first.

No owner after launch

The person who built it moves on, and the setup drifts. Name owners for the account and each board.

Training on features, not work

Teaching every option instead of how this team does its job. Train on the team's own boards.

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Want your monday.com setup to fit the bigger plan?

monday.com works best when it fits how the business runs and connects cleanly to your other systems. As your Managed Technology Provider (MTP), Balancelogic helps you design the structure, automations and integrations around your processes, so the platform supports the wider technology function.

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