

THE BACK-OFFICE RESET

A practical reset for the systems, information, and recurring work
that keep your business running behind the scenes.

CLEAR BOOKS. CALM OPERATIONS. CONFIDENT DECISIONS.

Business Operations & Bookkeeping Support



When the Back Office Feels Heavy, Start With Structure

The back office is everything that quietly keeps a business moving: records, recurring tasks, information, follow-up, files, workflows, access, and administrative routines. When those pieces are scattered or depend too heavily on memory, the owner becomes the system.

This reset is designed to help you identify the friction, simplify what can be simplified, and create a more dependable foundation. You are not rebuilding your business in one sitting. You are deciding what needs a home, an owner, a rhythm, or a clearer process.

How to use this reset

Work through one section at a time. Mark what is already working, circle what creates friction, and choose only a few improvements to act on first. The goal is a calmer operating rhythm, not a perfect back office.

What a healthier back office should give you

- ☐ Important information is easier to find.
- ☐ Recurring work happens without constant reminders.
- ☐ Ownership is clearer.
- ☐ Fewer tasks live only in the owner's head.
- ☐ The business can keep moving when one person is unavailable.
- ☐ Follow-up and handoffs are easier to see.

The Back-Office Pressure Check

Rate each area based on how reliably it works today.

Area	Working Well	Some Friction	Needs a Reset
Shared files and folders	☐	☐	☐
Customer/client information	☐	☐	☐
Vendor information	☐	☐	☐
Passwords and account access	☐	☐	☐
Recurring administrative tasks	☐	☐	☐
Invoices, receipts and financial documents	☐	☐	☐
Calendar and recurring deadlines	☐	☐	☐
Email and follow-up	☐	☐	☐
Standard templates and documents	☐	☐	☐
Processes and handoffs	☐	☐	☐
Project/action tracking	☐	☐	☐
Backup coverage when someone is away	☐	☐	☐

The three areas creating the most friction:

Give Important Information a Home

If important information can live anywhere, people spend time searching, asking, recreating, or relying on memory. Choose a dependable home for each category.

Information	Current location	Best home	Owner
Customer/client records			
Vendor records			
Contracts/agreements			
Financial documents			
Policies/SOPs			
Templates			
Project files			
Meeting/action notes			
Passwords/access records			
Tax/compliance records			

One-home rule

For each important category, decide where the current version belongs. Links can point to it from elsewhere, but the business should have one dependable source of truth.

Make Recurring Work Visible

Recurring work should not depend on someone remembering that it is time to do it.

Recurring task	Frequency	Owner	Trigger / due date	Where tracked

- ☐ Monthly bookkeeping preparation
- ☐ Billing/invoicing
- ☐ Vendor payments
- ☐ Payroll inputs
- ☐ Customer follow-up
- ☐ Reporting
- ☐ License/insurance renewals
- ☐ Routine file/record maintenance
- ☐ Regular team or client communications

Clarify Ownership and Handoffs

A task can be documented and still create friction if nobody is sure who owns the next move.

Which recurring tasks still come back to me even when someone else could own them?

Where do two people assume the other person is handling something?

Which handoffs regularly require chasing or reminders?

What work stops when one specific person is unavailable?

A useful ownership test

For important recurring work, someone should be able to answer three questions: Who owns it? What tells them it is time to act? How does the next person know it is complete?

Simplify One Process That Creates Friction

Choose one process that feels unnecessarily complicated, inconsistent, or dependent on memory.

Process to reset:

What starts the process?	
What happens now?	
Where does it usually get stuck?	
What information or tool is needed?	
What could be removed, combined, templated, or automated?	
What should the simpler version look like?	

- ☐ Write the new process in plain language.
- ☐ Assign one owner.
- ☐ Choose one place to track it.
- ☐ Test it before adding more complexity.

Do a Practical Digital Reset

You do not need a perfect folder tree or a new software platform. Start by reducing obvious digital friction.

- ☐ Archive or remove clearly obsolete shared files.
- ☐ Create a simple top-level folder structure people can understand.
- ☐ Rename vague files so their purpose is clear.
- ☐ Move current templates into one shared location.
- ☐ Confirm key business accounts have appropriate access and recovery information.
- ☐ Remove access for people who no longer need it.
- ☐ Document where passwords/access credentials are managed securely - do not store passwords in this worksheet.
- ☐ Create one place for current SOPs/process notes.
- ☐ Reduce duplicate versions of the same working document.
- ☐ Decide where action items and follow-up are tracked.

Keep security separate

This worksheet is for identifying where access is managed, not for writing down passwords, recovery codes, banking credentials, or other sensitive information.

Your 30-Day Back-Office Reset

Choose a small number of changes that will remove the most friction. Do not turn the reset into another overwhelming project.

Priority	Change	Owner	By when	Done
1				☐
2				☐
3				☐
4				☐
5				☐

What I am deliberately NOT fixing this month:

Protect the reset from scope creep

If a change does not improve clarity, ownership, consistency, or access to information, it probably does not belong in the first 30 days.

What Should Feel Different After the Reset?

- ☐ I know where important information belongs.
- ☐ Recurring work is visible and has an owner.
- ☐ Fewer tasks rely on memory or repeated reminders.
- ☐ At least one frustrating process is simpler.
- ☐ Shared files and templates are easier to navigate.
- ☐ Access and backup coverage are clearer.
- ☐ I have fewer loose ends living in my inbox or head.
- ☐ I know which back-office improvements can wait.

The biggest improvement I want to protect:

The next back-office area I will revisit later:

A Better Back Office Should Make the Business Easier to Run

The back office does not need to be elaborate. It needs to be dependable. When information has a home, recurring work has a rhythm, and ownership is clear, the business becomes less dependent on constant owner intervention.

If your reset reveals that the real issue is capacity - not just organization - that is useful information too. You may not need another system. You may need consistent support to maintain the systems you already have.

When support may help

Back Office Operations or Business Operations Support can help when records, recurring processes, workflows, administrative structure, and follow-through need a more dependable owner behind the scenes.

SCHEDULE A DISCOVERY CALL

MKG Legacy Ledger

Business Operations & Back Office Support

Clear Books. Calm Operations. Confident Decisions.

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