

FEELING OVERWHELMED RUNNING YOUR BUSINESS? START HERE.

A practical guide to finding clarity, reducing pressure,
and choosing your next sensible step.

CLEAR BOOKS. CALM OPERATIONS. CONFIDENT DECISIONS.

Business Operations & Bookkeeping Support



You Do Not Have to Fix Everything at Once

When a business feels heavy, it is rarely because one single thing is wrong. More often, it is the accumulation of unfinished decisions, recurring tasks, unclear numbers, scattered information, follow-up, and responsibilities that keep finding their way back to the owner.

This guide is designed to help you slow the noise down long enough to see what is actually creating pressure. You are not trying to reorganize your entire business today. You are simply identifying what deserves attention first and choosing one sensible next step.

How to use this guide

Set aside 20-30 minutes. Answer quickly and honestly. Do not try to make every answer perfect. At the end, you should have a clearer picture of where the pressure is coming from, what can wait, what should change, and what you can do next.

A note from Kathy

I have spent much of my career helping leaders and business owners make sense of busy environments, protect the details that matter, and keep important work moving. My hope is that this guide gives you a little more breathing room and a clearer place to begin.

— *Kathy Griffiths*

STEP 1

The Business Pressure Check

Rate each area based on how it feels in your business today.

Area	Mostly Clear	Some Friction	Needs Attention
Bookkeeping and financial records	☐	☐	☐
Knowing what the numbers are telling me	☐	☐	☐
Recurring admin and back-office tasks	☐	☐	☐
Processes and workflows	☐	☐	☐
Follow-up and communication	☐	☐	☐
Finding important information quickly	☐	☐	☐
Priorities and project coordination	☐	☐	☐
Delegation and ownership	☐	☐	☐
Growth initiatives and new ideas	☐	☐	☐
My own workload and mental load	☐	☐	☐

What stands out?

Which two or three areas are creating the most pressure right now?

What Is Actually Creating the Pressure?

Write down the things taking up space in your head. Include tasks, decisions, problems, follow-up, unfinished projects, or anything you keep reminding yourself not to forget.

What is weighing on me?	Urgent	Important	Noise	Not sure
	☐	☐	☐	☐
	☐	☐	☐	☐
	☐	☐	☐	☐
	☐	☐	☐	☐
	☐	☐	☐	☐
	☐	☐	☐	☐
	☐	☐	☐	☐
	☐	☐	☐	☐

A useful distinction

Urgent means it truly needs attention soon. Important means it matters but may not need action today. Noise feels loud but contributes little. “Not sure” is allowed – uncertainty is information too.

The Clarity Sort

Now sort the work into four practical buckets. You do not need to solve each item yet.

MUST HAPPEN

Time-sensitive, financially important, client-critical, compliance-related, or blocking other work.

SHOULD HAPPEN

Important improvements that will make the business easier to run, but do not require immediate action.

COULD HAPPEN

Useful ideas or enhancements that can wait without creating meaningful risk.

SHOULDN'T BE MINE

Work that does need to happen, but does not require your judgment, authority, or personal ownership.

Find the Friction

Friction is often more useful to look for than failure. A business can be successful and still contain unnecessary repetition, unclear ownership, scattered information, and tasks that rely too heavily on memory.

- ☐ What do I repeatedly put off because it feels harder than it should?
- ☐ What do I have to remember every single time instead of relying on a process?
- ☐ Where am I recreating information that should already exist somewhere?
- ☐ What tends to fall through the cracks when business gets busy?
- ☐ What work am I doing simply because nobody else clearly owns it?
- ☐ Where do I regularly have to chase information, approvals, receipts, updates, or decisions?
- ☐ What part of the business feels most dependent on me being available?

My biggest source of friction is:

Choose Your One Next Step

The goal is not to leave this guide with a longer to-do list. Choose one improvement that would create meaningful relief, clarity, or momentum.

My one next step:

Why this matters	
What 'better' would look like	
Who needs to be involved	
The first action I will take	
When I will take it	

Keep it small enough to start
A useful next step can be as simple as reconciling one account, documenting one recurring process, creating one shared information location, delegating one responsibility, or scheduling one conversation.

Your 30-Day Clarity Plan

Move only the most useful actions forward. Everything else can stay parked for now.

Timing	Action	Owner	Next checkpoint
THIS WEEK			
THIS WEEK			
THIS MONTH			
THIS MONTH			
LATER			
LATER			

At the end of 30 days, I want to feel:

- ☐ Clearer about my numbers and priorities
- ☐ Less dependent on memory
- ☐ More confident that important details are handled
- ☐ Less personally responsible for work someone else could own
- ☐ Other: _____

When Support Might Help

Sometimes the next step is something you can address internally. Sometimes the real issue is that the business needs more consistent support behind the scenes. Use this page as a diagnostic, not a sales checklist.

Support area	You may notice...	The aim
Professional Bookkeeping	Records are behind, inconsistent, hard to trust, or taking too much owner time.	Accurate records, reconciliations, reporting support, and a clearer financial picture.
Business Operations Support	Workflows are unclear, information is scattered, or recurring tasks create friction.	Clearer processes, documentation, coordination, and practical day-to-day structure.
Executive Business Support	Priorities, communication, meetings, projects, and follow-through are competing for attention.	A dependable right-hand partner who helps protect priorities and keep important work moving.
Back Office Operations	Administrative foundations are fragmented or overly dependent on the owner.	Better records, recurring processes, workflows, and administrative structure behind the scenes.
Business Growth Support	New initiatives are adding complexity faster than the business can absorb it.	Practical coordination and support around projects, systems, and growth priorities.

You do not need to know which service you need.

A good starting conversation is about what is happening in the business, what feels heavier than it should, and what you would like to feel more confident about. The right support can be worked out from there.

A Little More Clarity Is a Good Place to Begin

If this guide helped you identify one pressure point, one piece of friction, or one next step, it has done its job. You do not need a perfectly organized business before you ask for support. In fact, the messy middle is often exactly where a thoughtful outside perspective is most useful.

If you would like to talk through what is happening in your business, a Discovery Call is a simple place to start. There is no pressure and no complicated pitch — just a useful conversation about what feels heavy, what could be clearer, and what would make the business easier to run.

SCHEDULE A DISCOVERY CALL

MKG Legacy Ledger

Business Operations & Bookkeeping Support

Clear Books. Calm Operations. Confident Decisions.

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