

THE WEEKLY BUSINESS CHECK-IN

A simple 15-minute weekly rhythm to clear the noise,
protect priorities, and decide what matters next.

CLEAR BOOKS. CALM OPERATIONS. CONFIDENT DECISIONS.

Business Operations & Bookkeeping Support



Fifteen Minutes to See the Week More Clearly

A busy week can make everything feel equally important. This check-in gives you a short, repeatable pause to see what moved, what is stuck, what needs your attention, and what can wait.

Use it at the end of the week to close loose ends, at the beginning of the week to set direction, or at the same time every week to create a dependable operating rhythm.

Keep it short

Set a 15-minute timer. Answer in plain language. Do not turn this into a full planning meeting. The goal is to leave with a clearer head and three meaningful priorities.

Before you begin

- ☐ Open your calendar and current task/project list.
- ☐ Have your most important financial or sales snapshot available if useful.
- ☐ Capture loose thoughts rather than trying to remember them.
- ☐ Focus on decisions and next actions - not perfect documentation.

1. Look Back Before You Look Forward

What moved forward?	Wins, completed work, decisions made, progress worth noticing.
What did not get done?	Anything that slipped, stalled, or keeps moving from one week to the next.
What is creating friction?	A process, person, decision, missing information, recurring issue, or something taking too much effort.
What is still occupying my head?	Loose ends, follow-up, worries, reminders, or decisions I have not captured elsewhere.

2. Check the Business Pulse

- ☐ Cash / money: Is there anything unusual, overdue, or requiring attention?
- ☐ Customers / clients: Is anyone waiting on us, at risk, or needing follow-up?
- ☐ Team / support: Is anyone blocked, overloaded, or unclear on ownership?
- ☐ Operations: Is a recurring process creating avoidable friction?
- ☐ Priorities: Has anything changed that should alter what matters next?

3. Choose the Three Priorities That Deserve Attention

If everything is a priority, nothing is. Choose the three outcomes that would make the coming week feel meaningfully better.

Priority	Why it matters	Next action	Owner
1			
2			
3			

4. What Should NOT Stay With Me?

Look at the coming week and deliberately move work away from yourself where appropriate.

Task / follow-up	Delegate to	What they need	Check-in

5. What Can Wait?

Name something you are consciously NOT carrying this week:

6. Decisions and Follow-Through

Decision / follow-up	Next step	Owner	By when

7. Finish With One Sentence

At the end of this check-in, the most important thing for me to remember is:

A good weekly check-in should leave you with less to hold in your head
You should know what matters, what is waiting, who owns the next move, and what you have deliberately decided not to carry this week.

The 15-Minute Weekly Snapshot

Use this page on its own once the weekly rhythm becomes familiar.

WIN	What moved forward?
FRICTION	What is harder than it should be?
MONEY	Anything unusual, overdue, or needing attention?
PEOPLE	Who is waiting, blocked, overloaded, or unclear?
TOP 3	What three outcomes matter most next?
DELEGATE	What should not stay with me?
PARK	What am I deliberately not carrying this week?

WEEK OF: _____

Clarity Comes From a Regular Pause, Not a Perfect Week

A weekly check-in will not remove every surprise from running a business. What it can do is reduce the number of priorities, follow-ups, and decisions that remain invisible until they become urgent.

Over time, this simple rhythm can help you notice recurring friction, delegate earlier, protect important priorities, and make decisions with more confidence.

When support may help

If your weekly check-in repeatedly surfaces the same unfinished follow-up, unclear ownership, scattered priorities, or back-office friction, the issue may be less about personal productivity and more about operational capacity. Business Operations or Executive Business Support can help create a steadier rhythm behind the scenes.

SCHEDULE A DISCOVERY CALL

MKG Legacy Ledger

Business Operations & Executive Business Support

Clear Books. Calm Operations. Confident Decisions.

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