

CHECKLIST

Bookkeeping Business Systems Checklist

Take a quick look behind the scenes of your bookkeeping business. Check what's working, notice where things feel harder than they need to, and choose a few systems to improve.

1. Client Management

Think about what happens from the time a client says yes through your ongoing work together.

- ☐ I have a consistent process for onboarding new clients.
- ☐ I know what information I need from each client and how I collect it.
- ☐ I have a reliable way to keep track of client details and information.
- ☐ Recurring client tasks follow a consistent process.
- ☐ I have a process for offboarding clients when needed.

One client process I could make easier: _____

2. Workflow & Organization

Think about how you keep client work moving and make sure nothing gets missed.

- ☐ I have one place to see the work that needs to be done.
- ☐ Recurring tasks and deadlines are tracked.
- ☐ I can easily see what has been completed and what is still outstanding.
- ☐ Client files and documents are easy to find.
- ☐ I have a process for following up on missing information.

One part of my workflow I could improve: _____

3. Communication

Think about the systems that help you stay in touch with clients.

- ☐ Clients know how and when to contact me.
- ☐ I have a consistent way to request information.
- ☐ Routine reminders and follow-ups have a clear process.
- ☐ Frequently used emails or messages are saved as templates.
- ☐ I have a way to stay in touch between routine requests.

One communication task I could simplify: _____

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4. Running My Business

Your own bookkeeping business needs simple systems too.

- ☐ I have a consistent process for invoicing and payments.
- ☐ Appointments and important dates are kept in one place.
- ☐ I have routines for recurring admin work.
- ☐ Important business information is easy to find.
- ☐ I regularly review what is working and what needs attention.

One business task I could make easier: _____

Your Systems Action Plan

Look back over your checklist and choose three small improvements that would make your business easier to manage.

1. Make this easier: _____

My next step: _____

2. Make this more consistent:

My next step: _____

3. Get this better organized: _____

My next step: _____

Choose one to start with. Small improvements can make your whole business run a little more smoothly.