AUTUMN RIVER CO.

BOOKKEEPING & VA SUPPORT

The 15-Minute *Back-Office Reset*



Create a little breathing room in your business one simple system at a time.

A PRACTICAL PLACE TO BEGIN

Start with one small change

Choose one pain point today

You do not need a new app for everything. Pick the place where information gets lost most often: email, documents, tasks, scheduling, or receipts.

- ☐ **Inbox clutter:** create labels for Action Needed, Waiting On, and Reference.
- ☐ **Scattered documents:** create one consistent folder home for important business records.
- ☐ **Forgotten follow-ups:** maintain one visible task list with dates.
- ☐ **Scheduling back-and-forth:** use one booking link or shared availability system.
- ☐ **Missing receipts:** choose one capture method and a weekly review time.

Free and free-tier tools worth exploring

PROBLEM	TOOL	FIRST STEP
Documents	Google Drive	Create folders: Finance / Clients / Operations.
Tasks	Trello	Start one board: To Do / Doing / Done.
Appointments	Calendly	Create one simple meeting type.
Forms	Google Forms	Collect routine client information in one place.
Lists & tracking	Google Sheets	Track follow-ups and deadlines in one shared sheet.

Free-plan features and limits can change. Check the vendor's current terms before relying on a tool for your workflow.

MY FIRST SMALL CHANGE

The back-office task I will simplify: _____

My weekly check-in day: _____

A MANAGEABLE FIFTEEN-MINUTE PLAN

Your 15-minute reset

1. **Minutes 1–3:** choose one recurring administrative frustration.
2. **Minutes 4–7:** create one folder, board, list, or label to contain it.
3. **Minutes 8–12:** move five real items into your new system.
4. **Minutes 13–15:** set one weekly reminder to maintain it.

Keep the system sustainable

A simple system you maintain is better than an elaborate system you abandon. Write down where things go, who owns the next action, and when the system gets reviewed.

For financial or client records, consider privacy, access permissions, and retention requirements before sharing sensitive documents.

Signs it is time to delegate

- [ ] Routine email, scheduling, and document work competes with billable work.
- [ ] You repeatedly miss follow-ups even with reminders.
- [ ] You spend evenings recreating information already collected elsewhere.
- [ ] Your bookkeeping and admin tasks are bottlenecks rather than brief weekly routines.

A little breathing room for your business

You do not have to tackle every behind-the-scenes task alone. Autumn River Co. helps small business owners organize their books, establish practical systems, and stay on top of back-office work.

BOOK A FREE 30-MINUTE CALL

Educational resource only; not individualized tax, legal, or accounting advice. Do not change historical bookkeeping entries solely based on this guide.