

# The One Page Business Reset

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One sheet that shows where the money actually came from, and what to change before the next quarter starts.

How to use this sheet

Most people who work for themselves know how busy the last three months were. Very few can say which part of that work paid, which part only felt like work, and which client they would quietly rather not repeat. This page asks for the four facts that answer all three at once.

- Fill it from records, not from memory. Memory rewards whoever shouted loudest, not whoever paid best.
- One line per job that was paid for, not per task you did.
- Answer the last column honestly. It is the column that changes what next quarter looks like.
- Twenty minutes, once a quarter. Longer than that and it stops happening.

| THE FOUR FACTS          | WHY THIS ONE                                                             | WHAT IT CHANGES            |
|-------------------------|--------------------------------------------------------------------------|----------------------------|
| What they bought        | The name of the service is rarely what the buyer thinks they bought      | How you describe the offer |
| What it paid            | Revenue per job, not revenue per month, is where the pattern hides       | What you charge            |
| How they found you      | One channel usually carries most of the work and gets none of the credit | Where the next hour goes   |
| Would you take it again | The work you dread is the work that quietly caps the business            | What you stop selling      |

# Where The Money Came From

TRIAD WELLNESS BALANCE

|               |                    |
|---------------|--------------------|
| QUARTER _____ | FILLED IN ON _____ |
|---------------|--------------------|

| CLIENT OR JOB | WHAT THEY ACTUALLY BOUGHT | PAID | HOW THEY FOUND YOU | AGAIN |
|---------------|---------------------------|------|--------------------|-------|
|               |                           |      |                    |       |
|               |                           |      |                    |       |
|               |                           |      |                    |       |
|               |                           |      |                    |       |
|               |                           |      |                    |       |
|               |                           |      |                    |       |
|               |                           |      |                    |       |
|               |                           |      |                    |       |
|               |                           |      |                    |       |
|               |                           |      |                    |       |
| TOTAL         |                           |      |                    |       |

| BEFORE YOU CLOSE THE QUARTER                | YES                      | NO                       |
|---------------------------------------------|--------------------------|--------------------------|
| Every job above was invoiced                | <input type="checkbox"/> | <input type="checkbox"/> |
| Every invoice above was actually paid       | <input type="checkbox"/> | <input type="checkbox"/> |
| I know which channel brought the most money | <input type="checkbox"/> | <input type="checkbox"/> |
| There is work here I will not take again    | <input type="checkbox"/> | <input type="checkbox"/> |

THE ONE THING TO CHANGE BEFORE THE NEXT QUARTER

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

ONE MORE THING

## When this sheet runs out of room

The rest of the shelf picks up where this page stops: onboarding, pricing, invoices, projects and the week. Same grid, same two paper sizes, same ink saving version.

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