

APRIL



**IT'S APRIL
DO THIS**

Survive and Reset.



BUILD YOUR BOOKKEEPING PRACTICE

SCALE WITH PROVEN SYSTEMS

A top-down view of a wooden desk. In the upper left, a silver laptop is open. To its right is a small potted succulent. In the center, a white smartphone lies flat. Below the phone, a hand holds a black pen over an open notebook. In the bottom right, a white coffee cup sits on a saucer. A wooden tray with coffee beans is also visible on the left side of the desk.

APRIL Checklist



Triage the Final Emergencies

You cannot fix everything.

- Prioritize by legal deadline
- Prioritize by paid scope
- Prioritize by long-term client value

Say yes only to what you can complete without trashing your health.



Do a Post-Mortem on Your Season

Right after the rush:

- What went well
- What broke
- Where did you underestimate time
- Which clients ignored every request

Write it down now. You will not remember in July.

Because by July, you're going to have **THIS** year's year end strategy in place!!



Update Your Boundaries and Policies

Based on what you just lived through:

- Adjust cut-off dates for receiving client data
- Add rush fees where you absorbed chaos for free
- Clarify communication channels and response times

If you never change the rules, you are training clients to repeat the same behavior next year.



Refresh Your Systems and Templates

Use April's memory to:

- Update your year-end checklist templates
- Refine your CPA packet format
- Improve your onboarding emails for new clients

Every frustration should either become a script, a template, or a system.

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Protect Time Off

- Book at least one long weekend or a few lighter days.
- recovery time is not indulgent. It is personal maintenance.

Maven Tip - March

Maven App users know that you can keep an abundance of client notes at your fingertips, not just track deadlines and tasks! So be sure to check it out for yourself!

You keep the notes about the hiccups in each client's history, so when next year comes, your future self has a playbook instead of vague memories.

Maven App is also where you store business and owner/officer data, log ins, PWs, etc., at your fingertips with the confidence of bank level encryption with AWS.

April is not just about surviving the deadline. It is about using what you just learned to improve the rest of the year.

Need help with the climb?

That's what Maven is built for.

Visit www.mavensystems.us to see where you are — and where to start.