

■ Welcome + Purpose

Welcome! This guide is meant to be a simple companion to your 80/20 worksheet—nothing fancy, just a helpful way to think through each step with a little more clarity.

If you've ever looked at your week and thought, "Why am I doing all this but still feeling behind?"—you're not alone. The 80/20 Rule serves as a reminder to focus on the small portion of work, clients, or services that generate the most significant results.

As you move through each step of the worksheet, this guide will help you reflect more deeply, stay grounded, and apply what you uncover in practical ways.

You don't need to have it all figured out. You just need to begin.

■ Step 1: Who Are Your Top Clients?

This step involves identifying the clients who make your work feel meaningful—and sustainable.

You're not just looking for who pays the most (though that's part of it). Think about the people who:

- Pay on time
- Communicate clearly
- Refer others
- Respect boundaries
- And yes, invest in your best work

Start with your gut—who comes to mind first? Then, use the worksheet table to jot down why each one stands out. You might be surprised by what patterns show up when you look at them side by side.

There's no "perfect client" box to check here. The goal is to spot the relationships that support your business and feel good about maintaining them.

■ Step 2: Which Services Bring the Best Results?

Not all services require the same time, energy, or effort, and not all deliver the same return.

This step helps you take a closer look at the services that work best for your business. That might mean:

- Higher profit margins
- Consistent demand
- Streamlined delivery
- Personal enjoyment

You don't need to run the numbers down to the penny (unless that's your thing). Instead, look for services that feel aligned—where strong results match your effort.

Use the worksheet to evaluate each service honestly. Sometimes, the most profitable ones are also the easiest to overlook because they're running so smoothly.

Once you've filled it out, ask yourself: *Which 1–2 services deserve more of your attention this year?*

■ Step 3: Where Does Your Week Go?

This step is just about noticing where your time goes—no pressure or judgment.

You're not trying to be perfect. The idea is to get a better sense of what's filling your days. Sometimes, it's surprising (and a little humbling) to see how much time gets eaten up by things that don't really move the needle.

Start by jotting down what a typical day or week looks like. Think about:

- Client work
- Admin tasks
- Communication (email, meetings, follow-ups)
- Marketing or content creation
- Personal or transition time

The worksheet includes a table to help you log what you're doing and when. As you go, note which tasks feel productive—and which ones just keep you busy.

When you're done, look at the big picture:

- What tasks create results?
 - Which ones could be delegated or simplified?
 - Where do you have room to reclaim some time?
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Step 4: What Can You Let Go Of?

Every business has things that used to make sense but don't anymore.

This step is your chance to look honestly at what's no longer serving you. That could be:

- A service that takes too much time for too little return
- A client relationship that feels heavy
- A task you keep doing out of habit, not necessity

Letting go doesn't always mean cutting something out completely. It could mean adjusting boundaries, raising prices, setting better expectations, or delegating parts of the process.

Use the worksheet to list what's no longer aligned. Don't be afraid to name it—this is where real clarity starts to emerge.

Once you've completed it, ask yourself:

What boundaries or changes would help you protect your time and energy moving forward?

Step 5: Refocus and Reinforce What Works

Now that you've had a chance to evaluate what's working (and what's not), this last step is about using that insight.

- What's worth giving more of your time and energy?
- What are you ready to say no to without second-guessing it?
- Which habits or services feel solid enough to lean into a little more?

You don't need to reinvent everything. This is just about making small, intentional changes that support your goals—and feel good along the way.

Use this space to name what you want more of—and what you're ready to release.

■ Closing Thoughts

You've taken time to examine what matters most in your business—and that's no small thing.

The 80/20 Rule isn't just about numbers. It's about working with more clarity, protecting your energy, and building something that genuinely works for you.

You don't need to apply everything all at once. Small shifts are powerful when they're rooted in the right insight.

Come back to this worksheet as often as you need—quarterly, after a busy season, or anytime things start to feel off.

And if you ever want a second set of eyes or a fresh perspective, we're here to help.



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