

A FIELD GUIDE

The One-Person Back Office

The back office of a one-person service business, set up one job at a time



How to use this guide

This guide is for people who work alone: house cleaners, detailers, lawn crews of one, handymen, pressure washers, mobile groomers. You're good at the job. The paperwork is what piles up.

It has 18 chapters. The first ten cover the back-office jobs from the first message a customer sends to the weekly hour where you keep everything current. The other eight are for later. Each chapter is short enough to read on your phone between jobs.

Start here: one free evening

Don't try to set up all ten core chapters. Do these four, in this order. Each ends with a result you can see.

1. Chapter 1. Make your inquiry list and set up your missed-call message. Done when every unanswered inquiry is on the list with a next step and a date.
2. Chapter 3. Set up the daily check for inquiries and quotes waiting for a reply. Done when you've run it once.
3. Chapter 4. Put your jobs on one calendar and write your confirmation message. Done when your upcoming jobs are entered.
4. Chapter 6. Decide how customers pay and what happens when they don't. Done when every unpaid invoice is on a list with its amount and due date.

Bring your unfinished work: open inquiries, quotes, jobs and invoices. Old records can wait.

Two exceptions. If an invoice is unpaid or tomorrow's job is unconfirmed, start with chapter 6 or 4. If you're about to send a new quote and haven't worked out your costs, read chapter 2 first. Keep receipts, invoices and payment records from today on (chapter 7).

Put two things on your calendar: a daily follow-up check, and a weekly look at the parts you've set up. Chapter 10 builds that weekly time out later.

Chapters 2, 5, 7 and 9 can follow over the next weeks. Chapter 8 can't wait if you're unsure whether you need a license, a permit or insurance: read it before your next job. For a day-by-day order, use the 30-day setup plan at the back.

How each chapter works

Chapters 1 to 10 have the same parts:

- What this job is. The job, and what it costs you when it slips.
- The \$0 setup. Numbered steps using things you already have: your phone, a free calendar, a free spreadsheet. "\$0" covers software and organizing. Card fees, license fees, insurance and a professional's time cost extra.
- When to pay for a tool. The sign you've outgrown the free setup, and the kind of tool that helps. Prices are on one page at the back, with the date checked.
- Checklist. Boxes to tick.
- AI prompts. Optional copy-and-paste prompts for an assistant such as ChatGPT, Claude or Gemini. Fill in the [BRACKETS]. Each ends with what to check in the answer.

If a calendar, list or tool you already use meets a chapter's checklist, keep it.

Using the AI prompts

Check every answer an assistant gives you before you use it.

Assistants get facts wrong, especially prices, laws and fees. Each prompt tells the assistant not to invent them and lists what to check. If you can't fill in a bracket, write "unknown" and tell the assistant to ask you instead of guessing.

Never paste card numbers, bank details, passwords or ID numbers into an assistant. Say "the customer" instead of a name, and leave out street addresses, phone numbers, gate codes and alarm instructions. Some AI services have people

review conversations, so check your assistant's privacy settings first. Chapter 11 explains more.

What this guide is not

It isn't legal, tax or financial advice. Where a chapter touches those areas, it explains the common options and the questions to ask. Then it sends you to the right professional: a lawyer for legal questions, an accountant for taxes, a licensed insurance agent for coverage. Your state's small-business office can point you to requirements and referrals, but it can't advise on your case.

It has no trade price lists and no promises about income. Chapter 2 shows you how to work out prices from your own costs.

You can skip a setup step that doesn't fit your trade, but note that you skipped it. Don't skip a license, tax, insurance or agreement question that way. If you're not sure it applies, mark it "needs checking" and ask.

The back-office map

Chapters 1 to 10 are the core setup: ten jobs that keep a one-person service business running, in the order to set them up. "Start here" says which come first.

1 Catch every inquiry

Record every inquiry in one list, whether it comes by call, text or DM.



2 Price and quote

Work out your costs and your floor price, then write a quote that says what's included and what it costs.



3 Follow up

A daily check of unanswered inquiries and quotes waiting for a reply.



4 Book and schedule

One calendar, clear confirmations and reminders, and rules for cancellations.



5 Do the job right

A checklist per job, before and after photos, and a written change order when the scope shifts.

6 Get paid

Invoices, payment methods and what they cost, and what to do when a payment is late.



7 Money basics

A separate account, saved receipts, simple books, and money set aside for taxes.



8 Paperwork and protection

Business structure, licenses, insurance and a plain service agreement.

9 Reviews, repeat work and referrals

Asking at the right moment, and reminding customers to rebook.

10 The weekly back-office hour

One routine that keeps jobs 1 to 9 current.

Chapters 11 to 18 are for later. Come back to them once the core runs, or when a problem shows up: a helper to hire, a disputed payment, a slow season.

11 Working with AI assistants
What they do well, what to keep out of them, and how to check their work.

12 Your business brain
One page of facts that an assistant starts from.

13 AI routines and agents
Weekly drafting routines, and the rule that you send, book and pay yourself.

14 Know your numbers
A monthly look at what your jobs earn and what's left in the bank.

15 Get found
Your Google profile and the other places customers look.

16 Write it down
How-tos for your jobs, and terms for repeat customers.

17 Your first helper
Whether to bring in help, what the law may call it, and the first day.

18 When things go wrong
Unhappy customers, disputed payments, scams and account break-ins.

At the back

- The 30-day setup plan: one task a day, about 30 minutes each.
- Templates: quotes, messages and agreements to copy and fill in.
- The tool-costs page: example tools for each job, with price and date checked.
- Checklists: setup and weekly hour, on one page.



Follow up

What this job is

Someone asks for a quote. You send it. Then you go back to work, and they go back to their life. Nobody says no. Nobody says yes. A week later you've both stopped thinking about it.

That's usually how a quote goes cold, and you rarely learn why.

The fix is one rule: every open inquiry has a next step and a date for it, written down where you'll see it. This chapter gives you a spreadsheet that checks the rule every time you open it, and the words to send when someone is waiting on you.

The \$0 setup

Get the tracker

1. Download the free tracker: solobackoffice.com/follow-up-tracker/ It's a free Excel file with three tabs: Leads, Summary and How to use. It's made for Microsoft Excel.
2. Open the Leads tab. Its first eight columns, A to H, are the same as the inquiry list from chapter 1, so you can start here now or copy your chapter 1 rows over later. It comes with 14 made-up inquiries so you can watch it work. Set the first row's Next step date (G2) to today and Due shows Today. Set it to yesterday and it shows Overdue.
3. When you're done, select A2:H15 and use Clear Contents. That clears the made-up inquiries and keeps the formulas in columns I and J. Don't delete the rows.

4. Add one row per inquiry. You fill in columns A to H, from Name to Status. Status is a dropdown: New, Quoted, Booked, Won or Lost. Columns I and J (Due and Days since contact) fill themselves in.
5. Always type a real date in Next step date, like 10/28/2026. A date typed as words, like "Tue", can't be counted.
6. The tracker holds 200 inquiries, rows 2 to 201. When it's full, save a new copy and start again.

The six Due flags

The Due column checks every row that has a name. It shows one of six flags, or nothing.

Flag	When it shows	What you do
Overdue	The next step date has passed	Do the step today, then write the next step and its date
Today	The next step is due today	Do it today
Next 2 days	Due tomorrow or the day after	Read the next step and prepare if needed
Needs next step	Next step is blank	Decide what happens next and write it down
Needs date	There's a next step but no date	Pick a date and type it
Fix date	The date was typed as words	Retype it as a real date

Overdue, Needs next step, Needs date and Fix date turn the row orange. Today turns it yellow.

Three rules sit behind the flags:

- Won and Lost don't hide unfinished work. A row keeps its flag while it has a next step or a date. A cancelled job may still owe a refund.
- Winning a job doesn't finish it. For a won job that still needs an invoice, write "Send invoice" and the date you plan to send it. It shows Overdue once that date passes. After you send it, update the row, or clear both cells if nothing is

left. Reviews and rebooking are next steps too. A promotional email can fall under marketing-email rules, such as an opt-out, so check them (chapter 9).

- A job is finished when its Status is Won or Lost and both Next step and its date are cleared. Then it shows nothing.

Your daily 5-minute check

The tracker sends no reminders. Due only changes while the file is open. Pick one time you'll always open it (before your first job, or at lunch) and put it on your calendar.

1. Open the file and set a five-minute timer. Add anything new that came in since yesterday, with its next step and date.
2. Use the filter arrow on the Next step date header to sort by date. Start with the rows that hold a promise to a customer: Overdue, then Today. Then fix the housekeeping rows.
3. For each row, read the latest conversation first, then do the step or send the message from the next section. Update Last contact after any message or call. Then write a specific next step and its date, such as "Final quote follow-up". Anything that still needs action leaves with both; when nothing is left, use the closing rules above.
4. Open the Summary tab. The line "Missing next step or date" should read 0. Save and close.

If the list is longer than five minutes, finish the customer promises first. Then put a time on your calendar to come back to the rest.

Messages for common tasks

Read the latest conversation and your Next step before you send anything, in case the customer has already answered. Use a message only when the situation in parentheses matches.

If a customer declines or asks you to stop, stop the follow-ups, set Status to Lost, and don't send the closing message. Clear Next step and its date unless you still owe them something, like a refund. If they ask you to check back later, use that date.

Reply the way the customer asked you to, or in the same conversation (Came in via shows how they first reached you). Include your name and business if they might not recognize you. Fill in the brackets.

A quote you sent, with no reply:

Hi [first name], it's [my first name] from [business]. Checking in on the quote for [job]. Any questions I can answer? If your plans have changed, no problem.

Send the quote:

Hi [first name], here's the quote for [job]: [what's included and the price]. It's good through [date]. If you'd like to go ahead, reply here and we can talk about available dates.

Confirm a call or visit the customer has already agreed to:

Hi [first name], I'm planning to [call / stop by] on [day] about [job]. Is [time window] still good for you?

If you only proposed the visit, ask first: "Would [day] between [times] work for a [call / visit] about [job]?" It isn't booked until they say yes.

Resume a conversation you left unanswered:

Hi [first name], sorry I didn't get back to you sooner about [job]. Would you still like me to [next step, such as send a quote or come by]? If not, no problem.

If you promised them something, send it with this message. Then write the next step and its date in the tracker.

Needs date and Fix date need no message. They're housekeeping. If you're waiting on the customer, the date to type is the day you'll check in, not the day you hope they'll answer.

The last message. Decide now how many follow-ups you'll send before you let a lead go, counting this one. Two is a reasonable number to start with: one check-in, then this. Use the customer's timeframe if they gave one, and never send several missed follow-ups at once. Send this as your final follow-up, then set Status to Lost and clear Next step and its date:

Last note from me on [job]. I won't send any more follow-ups about it. If you'd like to revisit [job], just reply here.

For a won job that is overdue because you haven't invoiced, there's no message yet. Send the invoice (chapter 6).

What the tracker does and doesn't do

- A finished job (Won or Lost, with Next step and its date cleared) drops off the flags. A row with an invoice or refund still to do stays flagged until you clear it.
- A date typed as a word, like "Tue", shows Fix date instead of hiding the row.
- A lead with no next step or no date shows Needs next step or Needs date, and the Summary counts them.
- It prints sideways, one page wide.
- It sends no reminders. Due updates when you open the file, so open it daily.
- It won't collect inquiries for you. You type them in.
- The sample dates age, so clear the sample entries (A2:H15) before real use.
- It's made for Microsoft Excel. If you open it in another spreadsheet app, check the Due column against the six flags before you rely on it.

When to pay for a tool

It may be time to compare tools when one of these is true:

- You forget to open it. A tool that sends a reminder to your phone may help.
- Inquiries arrive faster than you can type them in. A tool that collects texts, calls and form entries into one list may help.

- You have more than 200 rows. The tracker's formulas cover 200.
- Someone else needs to work from the same list.

The kind of tool to look at is a simple customer-contact manager (a CRM) with reminders and a phone app. Before paying, check that it handles the reminder or channel you need. Prices for a few are on the tool-costs page, with the date each was checked. Until one of these signs shows up, the spreadsheet is enough.

Checklist

- ☐ Download the tracker and open it
- ☐ Try the sample rows, then clear them (select A2:H15, Clear Contents)
- ☐ Add every open inquiry, each with a next step and a real date, and update Last contact when you reply
- ☐ Put the daily 5-minute check on your calendar
- ☐ Write the follow-up messages in your own words and save them somewhere you can paste from
- ☐ Decide how many follow-ups you'll send, the closing message included, and stop if a customer says no
- ☐ Clear Next step and its date on a Won or Lost row only when nothing is left to do
- ☐ Check that "Missing next step or date" reads 0 before you close the file

AI prompts

PROMPT Follow-up texts in my voice

I run a one-person [TRADE] business. A customer asked for a quote on [JOB] [NUMBER] days ago. I sent the quote and heard nothing.

Write [TOTAL NUMBER] follow-up texts. Make the last one a polite closing message, counted in that total. Keep each under 300 characters, friendly, with no pressure and no discounts. Call the customer [CUSTOMER FIRST NAME] and sign as [MY FIRST NAME].

Don't invent prices, deadlines, policies, discounts or openings in my schedule. If a message needs one, put it in [BRACKETS] for me to fill in.

Check the answer for: invented offers, deadlines or openings, messages over 300 characters, and wording that doesn't sound like you.

PROMPT Turn my notes into tracker rows

I keep a follow-up spreadsheet for my [TRADE] business. Today is [TODAY'S DATE, MM/DD/YYYY]. Below are my notes on open inquiries.

Make a table with these columns: Name, Phone or handle, Came in via, What they want, Last contact, Next step, Next step date, Status.

- Name is a first name only. Leave Phone or handle empty.
- Came in via must be one of: Text, Call, Facebook, Email, Web form, Referral, Other.
- Status must be one of: New, Quoted, Booked, Won, Lost.
- Write every date as MM/DD/YYYY.
- Use only what my notes support, in every column. If my notes don't give a value (including Status, Came in via, Last contact, Next step or a date), or it's ambiguous, leave that cell empty and don't guess. Afterward, list those rows under "Needs your decision".
- If you worked out a date from a weekday or a phrase like "last Friday", list it under "Dates to confirm" with the words I used.

My notes:

[PASTE YOUR NOTES: first name, what they asked for, when you last talked, what you promised to do next. No addresses.]

Check the answer for: dates it worked out on its own (compare with your notes), a Status or Came in via value outside the lists, and any cell it filled in that your notes don't support.

Get the full guide

You have read the complete follow-up chapter from *The One-Person Back Office*, including its checklist and AI prompts. The full guide has all 18 chapters, each with its \$0 setup, a checklist and copy-and-paste AI prompts, plus the pages at the back.

solobackoffice.com/back-office-guide/

The core setup

- 1 Catch every inquiry
- 2 Price and quote
- 3 Follow up
- 4 Book and schedule
- 5 Do the job right
- 6 Get paid
- 7 Money basics
- 8 Paperwork and protection
- 9 Reviews, repeat work and referrals
- 10 The weekly back-office hour

For later

- 11 Working with AI assistants
- 12 Your business brain
- 13 AI routines and agents
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- 15 Get found
- 16 Write it down
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- 18 When things go wrong

At the back

The 30-day setup plan

Templates

Checklists

Tool costs, checked October 2026

