

The Business Startup Toolkit

Everything you need
to set up your
business back office
— the smart way.

Done-for-you systems • Trusted experts • Real support

www.shbooks.ca



SH
Books
BOOKKEEPING
SERVICES



Welcome from Shannon

Starting a business?

You don't need to guess your way through it.

You've got a big idea — and maybe a few sticky notes and receipts to go with it. But let's be real:

- ☞ You're not sure which tools to use
- ☞ You don't know what to automate
- ☞ You're trying to Google your way to financial systems

STOP. You don't need to “figure it all out.” That's what I do.

I'm Shannon, founder of SH Books. I've spent over 20 years helping business owners like you ditch the chaos and get clean, confident systems in place — and this guide is your shortcut.

Use it to set things up right. Or? Let me do it for you.





STEP 1:

Choose Smart Software

Still using Excel? It's time to upgrade.

1. Spreadsheets slow you down.
2. Tools like QuickBooks Online, Dext, and QBO Payments automate your accounting and save HOURS.
3. We'll help you choose the right tech stack and set it up for you — fast.

✓ Stop guessing. Start using the right tools.

Let us do the setup → SHBooks.ca

SH
Books
BOOKKEEPING
SERVICES



STEP 2:

Automate With AI

Let AI take over the boring stuff.

A: You weren't born to sort receipts or chase invoices.

B: We use AI + automation tools (QBO, Dext, custom flows) that literally do the work for you.

C: You focus on your zone of genius. We'll build systems that run in the background.

⚡ Your business deserves tools that work while you sleep. Let us do the sorting for you.

Book a Done-For-You consult → SHBooks.ca





STEP 3:

Store Receipts (The Smart Way)

Shoeboxes aren't a system. Let's fix that.

A: Receipts in your purse? Inbox? Glove box?

B: With tools like Dext, and cloud drives, everything's scanned, sorted, and shared with your accountant.

C: We'll build you a system that works, and show you how to keep it clean.

 Paperless. Painless. Audit-proof.

Ask Shannon to build your setup → SHBooks.ca

SH
Books
BOOKKEEPING
SERVICES



STEP 4:


Build a Trusted Team

You don't need to do this alone. Seriously.

A: Wearing all the hats? That's a one-way ticket to burnout.

B: You need a team: Bookkeeper  HR  Accountant 

C: We're connected to pros we actually trust — and we'll connect you, too.

 The right people make everything easier.

Let Shannon's team connect you → SHBooks.ca





STEP 5:

Build Your Online Presence

If they can't find you, they can't hire you.

A: Your business needs more than word-of-mouth.

B: Website, SEO, email list, Google profile — it matters.

C: We'll help you build a presence — or connect you to trusted pros who will.

🌐 Need a designer, social media expert, or SEO help?

We know someone. Just Ask Shannon → SHBooks.ca



You can try to figure it all out...

Or just let us do it for you.

If this checklist feels like a relief — imagine having it DONE. No late nights. No guessing. Just systems that make you feel like a real business owner.

Here's what we offer:

- ✓ Bookkeeping system setup
- ✓ Done-for-You monthly support
- ✓ Trusted expert referrals
- ✓ Business automation flows
- ✓ One-time setups or long-term support

◆ Ask Shannon Now → [SHbooks.ca/contact](https://shbooks.ca/contact)

📍 [SHBooks.ca](https://shbooks.ca)

✉ shannon@shbooks.ca

🔗 [Facebook](#) | [LinkedIn](#)

© SH Books Bookkeeping Services


SH
Books
BOOKKEEPING
SERVICES

Not ready yet?


Start with The Organized CEO.

The Organized CEO is our blog — packed with no-fluff advice to help you:

- ✓ Understand your business finances
- ✓ Build smarter systems
- ✓ Organize the chaos without burning out

 Sign up for updates, tips, and resources that'll keep you moving — even if you're not ready to hire just yet.

 Visit SHBooks.ca/blog to get started.

 Join our mailing list for fresh tips, tool recommendations, and time-saving strategies — sent right to your inbox. → Sign Up for Updates **HERE!**

SH
Books
BOOKKEEPING
SERVICES