



Because shit hits the fan, I don't expect operational perfection. That's why I help clients build systems with overlap.

Let's face it, life and business get chaotic every once in a while, and you're probably going to miss an invoice here and there. Its not a crisis if we put a system in place where we can track potentially lost revenue.

So here are my two requirements that my clients aren't really allowed to deviate from if they want to work with me every month.

My first requirement is that you need to use a merchant card processor that automatically records client names. With more and more people paying with credit cards, it is imperative that you can collect this data with no effort. Just trust me on this.

My second requirement is to pay for job-related materials, you should be using a Line of Credit with your vendors instead of credit cards. I like using this tool because when you set it up, you can require that either an invoice number or a client name is provided before you can leave with your materials. This is huge, especially when you start hiring people.

These lines of credits are the last chance we have to catch any revenue that was possibly missed.

I'll give you an example:

Very often, someone from our church would call my husband to do something small for electrical work. They never called the office to schedule an appointment, they'd always call his personal number. My husband wouldn't create an invoice because he usually squeezed them in between regular client calls and was in a rush to get going.

-So right there, I don't have any idea that he's performed work for somebody. But its okay, because I've got a system in place.

-There's was no payment collected because the person in charge of maintenance isn't necessarily in charge of making payments. This happens regularly.

-But, because my husband ran to Home Depot and made a charge on the Line of Credit for our church, I'm able to catch that he did in fact perform work for our church and I can send an invoice and collect money after the fact.

Basically, if we spend a minimal amount of time setting up a simple system that requires no maintenance from you, we've got ways to make sure that you don't miss out on any revenue you've earned.