

One of my very first clients, let's call him MARLON, is a local tradesman with a successful and growing business.

I've been working with him for over a year now, sometimes every week, sometimes every month or so, depending on his schedule, which can be manic.

At the beginning, he was spending his evenings and weekends sending out quotes, invoices, etc. and trying to keep tabs on what he was spending. In all honesty, he had no idea which invoices had been paid or what he was spending every month, and was exhausted from having very little down time.

At first it took a while to get everything into a format which he could just hand over to his accountant. Before long, he had spreadsheets in place which tracked his paid and outstanding invoices and how much he was spending every month, and what he was buying. From this it was easy for his accountant to prepare a detailed cash flow forecast so Marlon now has a better idea of where he stands financially, not to mention in which areas he can try to reduce costs.

Of course, there are mobile apps available now which can help you reconcile your income and expenditure, such as Xero™. These are great, but often people don't have the time to learn new software and really only want to see the bottom line and then leave the rest to their accountant.

Now Marlon is more comfortable with the state of his finances, we can focus our attention on other elements of his business!

... don't forget, I offer a #twohourfreebie to small business owners interested in seeing how a Virtual Assistant can add value to their business.

