

One of my new clients, let's call her Ch**ARLO**tte, is a medical professional. She is also a mum and leads a very busy life, juggling her family and work commitments.

When I first start working with a new client, some are not sure exactly what they need, but they're pretty sure they're struggling to keep up.

Charlotte wasn't like this at all – I turned up for our first meeting and she had piles of stuff ready for me to start with. First of all, and most time sensitive for her, a comprehensive client database with all her patient's personal details in one place.

Charlotte had lost sight of her business finances and was concerned she was working very long hours but for what reward. So I put together some financial spreadsheets for her which detail her monthly income and expenditure, so now she can keep a closer eye on her finances to make sure her hard work is not in vain. This will also save her lots of time when it comes to the January self-assessment deadline as everything will be ready for her to hand over to her accountant!

I've also helped her with some family admin; all the school holiday dates are now in both her and her husband's online calendars, so they can see at a glance when they might need to arrange childcare.

Even a quick catch up over a cup of tea can spark new ideas. We were going through the client database and she realised how many patients were due their next appointment. That same day she called six patients and made four new appointments, how good is that?

When your admin builds up to the point that you are losing sight of your goals, then a little outside help can work wonders!

... and don't forget, I offer a #twohourfreebie to small business owners interested in seeing how I can help.



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