



LET'S CHAT.

WE MEET IN PERSON, VIA VIDEO CHAT, PHONE, OR EMAIL.



IDENTIFY GAPS, CHALLENGES & GOALS

related to your financial management. We talk about where your pain points are related to the numbers. I learn more about your business and you learn about my methodology.

PROPOSAL

Based on our conversation, I draft a proposal outlining exactly what you're looking for. And, of course, **YOU ACCEPT!**

or we make changes as needed... I'm super flexible!

PROJECT PLAN & AGREEMENT

Once you accept the proposal, I'll put together a project plan with concrete deliverables and associated timeline, along with the information I'll need to get started. This is usually access to your accounting software, CRM tool, rate/revenue information, and background documents.

IMPLEMENTATION  
THE FUN PART!

INITIAL AUDIT

This critical stage helps shape my analyses

I spend the first part of the project in two phases:

1. The 30,000 foot view where I take an overall snapshot of your financials. and
2. Getting to know you and your organization. I dig deep into your numbers to understand revenue, expense, and cash trends, what a typical month or year looks like, and any anomalies.

SAMPLE PROJECTS

This is based entirely on your needs. I can help you:

- determine the right rates for your services
- develop a revenue pipeline so you can "see around the corner"
- generate useful and replicable financial statements and dashboards for an easy-to-understand picture of your organization
- create a cash flow forecasting tool
- prepare for an audit
- clean up any problem areas in your books
- review or create a finance manual
- implement efficiency tools

DELIVERABLES

WE MEET AGAIN TO REVIEW MY ANALYSIS, RECOMMENDATIONS, AND ANY TOOLS I'VE CREATED FOR YOU



ONGOING FINANCIAL SUPPORT

After we get to know each other through an initial project, let's continue the fun. We agree upon a set fee per month for as much access to me as you'd like.

OR FINAL INVOICE DUE

If we decide an ongoing relationship is not for us, your final invoice is due and we're on our way!