

In Case Of Emergency...Trust Your Procedure

By: Kariné Macri

There is nothing like peace of mind, especially when you have a business that serves as an ambassador to your profession. I am a Writing + Language Specialist. That means, when my clients reach out to me, I must be absolutely certain that I have my administrative affairs in order BEFORE I even think of glancing at the work ahead. This concerted effort to create a practice out of procedure allows me to be creative, focus on my work and give my clients the quality service and integrity they deserve.

Peace of mind is not bought; it is created through practice and procedure. Here are some basics that I have used, continue to use with positive results and advise others to employ:

1. Have your Tax ID No. handy. I keep it with my digital profile stored on my phone so when I give out my contact information, my client's have the number handy. If you don't have one and are considering going into business for yourself you can get sorted out rather quickly and simply from the IRS (<http://www.irs.gov/businesses/small/article/0,,id=102767,00.html>)
2. Have all the formalities of incorporation safely stored in a hard-shell binder and keep a copy in a safe deposit box at the bank. Most small businesses/sole proprietorships are based out of private residences, the liability for fire, theft or damage extends to your business as well. Make sure all the work you put in does not go up in flames, literally. You'll thank me later.
3. Ensure you've dotted all your "i"s and crossed all your "t"s when it comes to formalizing the incorporation process. Since, every State has different regulations, make sure you comply with the mundane but necessary points in order to validate your business as a legitimate entity; e.g., After completing all the necessary paperwork with the courts, I also had to place a small advert in two separate newspapers announcing the establishment of my business (there was a small fee associated with this print). The business is not considered legitimate until after the adverts are run. You don't want to do all the heavy lifting and then fall short of a minor but important detail like this. Create a check-list of what actions must be taken to get from zero-business and check them off as you complete them. You'll thank me later.
4. Set up a preliminary Letter of Agreement (LOA) and a Non-Disclosure Agreement (NDA) if necessary. Both documents provide peace of mind for yourself and your client simply by outlining what work will be completed, how much the client will pay and how none of the details will be shared by anyone without formal agreement on both ends. They are not difficult to write and if you ask around you will find fellow business owners who can share their copy to use as a template. Don't worry if you don't get it right the first time; this doesn't require a law degree; it just concretizes the basics of what each party can expect during the business transaction. Keep in mind, nothing is chiseled in stone and you can always adapt these letters to fit the client. Even a poorly written contract has a better chance of getting you paid in court than no contract. You'll thank me later.
5. Make sure your clients provide you with their VALID contact information. I learned the hard way. The last thing you want to do is wonder why you haven't gotten paid, dial your client's number and get the "*doo roo roo, the number you have dialed is no longer in service*" message. You'll thank me later.

6. Keep a regular list of clients to whom you've provided your services (even pro-bono) and send them an annual update (I usually write formal Christmas cards) thanking them for their patronage and letting them know about business goals for the next year. Make sure to not turn this into a full-blown marketing campaign because nothing says "desperate for business" like using the Good Lord Jesus' birthday as a platform for selling your product. People can smell a sale a mile away and you are not fooling anyone. Make sure the message is about gratitude, not about making a buck. Also, this is a business correspondence; please do not include photos of your nieces in their bunny outfits, even though I'm sure they are *sooo cute*. Keep the cutsie photos for your personal correspondence lists. Never, I repeat NEVER, mix these two lists. You'll thank me later.
7. Keep all your business letterhead, logos contacts, etc. in an organized system where you can readily reach them even at 3:00 AM when you barely have one eye open. Every business is only as good as its least efficient function; so don't start fumbling for invoices when a client calls up to request another copy. Remember YOU are the professional. Act like it. You'll thank me later
8. Have a weekly or monthly data purge. This is a holy ritual, never let up. Back up your data to servers that are NOT in your house and for those of you that don't have a lot of data to back up, put it on a thumb drive and back that puppy up every week. If you do end up missing a week and something DOES go wrong, you are only behind a week. Similarly, once a year, wrap up your accounts, books and whatnot and close out the year. This means putting away old files too. Create a spreadsheet and copy the files into this spreadsheet. Keep this spreadsheet in a page protector and put that little page protector into a reference binder for your business. You will feel like you are your own Personal Assistant when you reference file locations from your desk without having to go through any hardware. You'll thank me later.
9. Use encrypted data software and encrypted thumb drives like the ones at IronKey.com that self-destruct if someone types the incorrect password more than 10 times. You will look cool AND you'll thank me later.
10. Spend money on good business cards and make sure you put information that doesn't regularly change, i.e., phone number, email, and website. No need to put your home business address unless you need people to know where you live. Less clutter on a business card tends to attract more attention. You can thank me later at karine.macri@me.com