

Must-do Tips No 83 - Best Practice Billing

One of the things that used to annoy a lot of clients was sloppy billing practice from their professional advisers - it still does*.

To your average professional, billing is often the *humdrum* (and, in some branches, *embarrassing*) *bit* that follows the *interesting bit* - doing the work. To the client, it is the ever *important bit*, by which a significant part of their job performance is evaluated (i.e. the efficient management of budgets). This perceptual disjoin is at the heart of much of the problem.

Allowed to build up over time, annoyance can turn to something much more damagingly serious to the relationship, so below we have three quick, practical things for you or your professionals to do to keep the client billing-happy ;-).

* Billing is one of the issues also covered in **Must-do Tips No 66 - The Good Housekeeping Guide**: to be found at <http://www.peoplescope.com/must-do-tips.php>.

Tip 1 – DON'T delegate!

We spend quite a lot of time encouraging senior professionals to delegate more of their work appropriately - for good leverage's sake. However, one of the rule-breaking exceptions is when preparing and issuing bills. Why? Because getting a bill from someone who you don't know and looks like they don't know your transaction can be interpreted as rude and uncaring by the recipient. Staying with a matter from start to finish and devoting a sensible amount of time to the bill yourself will mean fewer such problems and a smoother client relationship.

Tip 2 - be a flexible friend

Do you always present bills in the firm's 'house style'? If you do, unwittingly, you may be creating a source of additional effort and trouble for some clients as they have to unpick the firm's data and re-present it internally in ways that their organisations better understand. The smart relationship managers recognise this issue and ask clients up-front how they would like their bills to be presented. Even if it requires a bit more effort on our part, it's well worth it for the goodwill that is generated..... as is ensuring that other parts of the firm do likewise if they also work for the client.

Tip 3 - avoid the sausage factory look

Related to Tip 2, there is an interesting aspect of billing psychology we have come across that's well worth remembering.



Bills that look like they have come off a production line tend to invite more scrutiny - and thus the greater risk of write-offs or delayed payment - because some clients say that they mistrust such systematic treatment. To overcome this, find simple ways to personalise the invoice - e.g. by adding manuscript amendments or a signed personal note - so that they know you are still involved and in control.

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Best regards.

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