How to "Excel Your Profits" and manage your money without adding hours to your day with Janet Ickes

with Janet Ickes · Hosted by Kathi Burns, CPO®, Business FLOW Strategist

Janet Ickes is a QuickBooks ProAdvisor who spent more than 20 years in corporate accounting and payroll before helping small business owners set up simple money systems.

- [ ] Write down what you want your money system to accomplish before you pick any tool.
- [ ] List the features you need, such as inventory, invoicing or receipt capture, before choosing bookkeeping software.
- [ ] Ask someone who has used a program before you buy, instead of guessing at the level you need.
- [ ] Start at the software level you need now, learn it, and add on only when you need more.
- [ ] Snap receipts with your phone as you go so you aren't hunting for them at tax time.
- [ ] If you track your books on paper, try moving to a spreadsheet first.
- [ ] Set a quarterly check-in on your numbers instead of waiting until the end of the year.
- [ ] Color code your calendar into blocks for visionary work, client work and marketing, and let clients book only inside client blocks.
- [ ] Add a 15-minute buffer between appointments and treat each block like a doctor's appointment.

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