

# Finances & Metrics Systems

## Sample...

### Receipt tracking

- In-person receipts: put directly in envelope in purse
- Digital receipts: immediately move to "new receipts" folder

### Bookkeeping

- Monday mornings
  - Enter previous week's sales
  - Enter previous week's expenses
  - Move digital receipts from "new receipts" folder to "archived receipts" folder
  - Move physical receipts from envelope to folder in file cabinet
  - Compare totals to week before and same week of last month

### Quarterly Review (last day of quarter)

- Check numbers...
  - Gross
  - Net
  - Expenses
  - Rebooking Rate
  - Average Client Spend
  - Client Acquisition Cost
- Compare all numbers to last quarter and same quarter of last year
- Review and update business plan
- Review marketing results
- Build marketing strategy for next quarter
- Review services and pricing and update as needed
- Update digital presence to reflect any changes
- Set specific goals for next quarter

*Your turn...*

