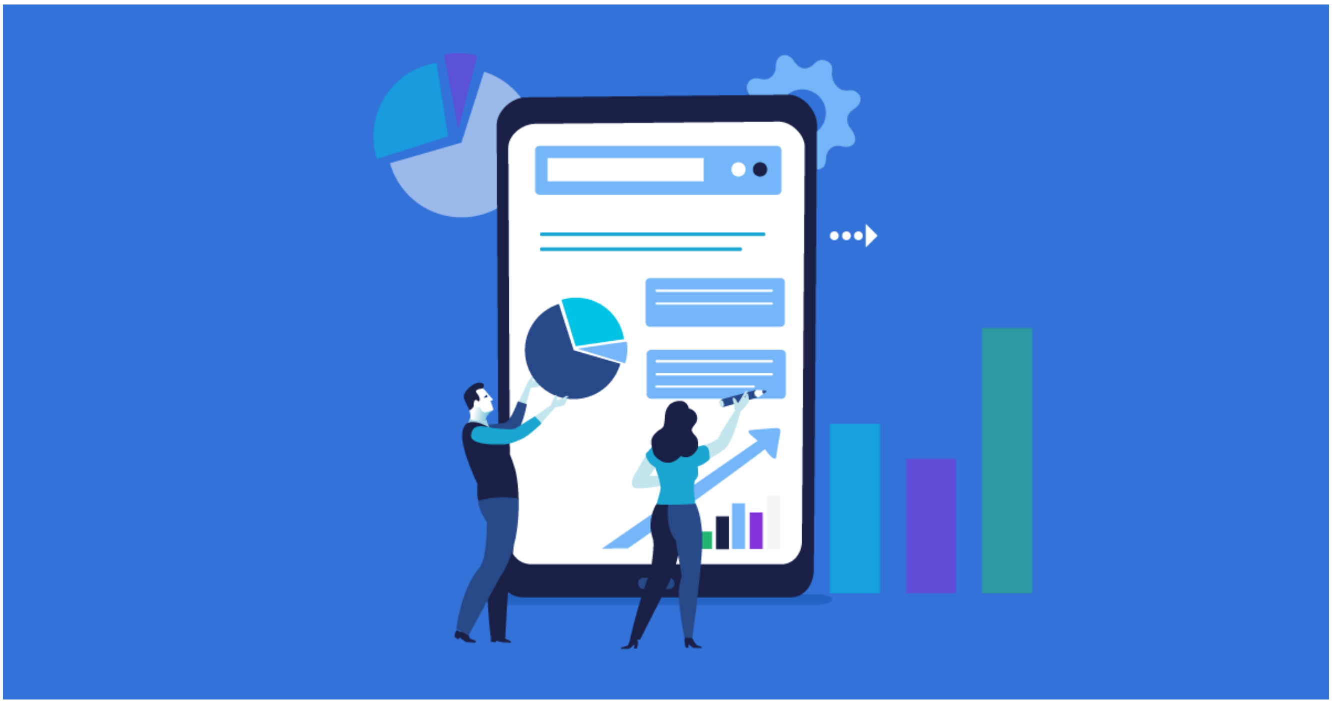
How To Best Handle Multiple Contacts for Invoices



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Your client has an inconvenient request.

They want you to send invoices to multiple contacts. It's inconvenient, messy and confusing. Does this mean you'll need to accept payment from each of these contacts?

What about payments?

Are you expected to chase each contact for payment as each contact tells you to "*speak with someone else?*" It's a hassle you'd rather not deal with. Why do you need to deal with these issues?

Your client *expects* you to, that's why

Isn't that the real reason?

Clients expect you to accommodate their every need. If you can't do it you may not get paid. Or, they may decide to find someone else.

Which is frustrating.

It's the old adage, whoever has the gold makes the rules. And your clients seem to be making all of the rules at the moment. Clients aren't really all that focused on what you need at the moment, right?

Wait a minute.

What if we're wrong about our client's motives? What if there are other *legitimate* reasons for your client's outlandish requests?

Why is that important?

Asking *why* gives you intel about the "*what*" and "*how*"

You need the why.

The why gives you a clear indication of your standing with clients and how to best approach the relationship. Let's look at a few scenarios to show you what I mean.

Scenario #1: Budgeting

You've just landed a new corporate client. You're working with a specific division. You're doing great work, your client is pleased. They've requested your help on more complex matters. Your retainer has grown three times.

Then you're hit with the usual request.

Please send a copy of the invoice to *Jan* the CEO, *Marshall* in accounting, or *Howard* in legal (who you're working with).

Is this cause for alarm?

What happens if I can't get Mitch to pay the invoice? Do I reach out to Jan? Or do I go to see Harrison? Is this simply because Jan wants to be in the loop? Or is this a control issue?

How to handle it:

This situation is straightforward yet delicate. Handle it wrong and you may burn bridges with people looking for a reason to replace you. How do you handle this situation properly? You ask each contact specifically about what they're looking for.

Hi [client],

I noticed that you requested a copy of the invoices. Did you want a copy of just this invoice or all invoices moving forward? If you're looking to stay in the loop I can also forward you the statement at the end of each month?

Let me know,

[your name]

Attorney

You can send a similar email to each of the contacts who've requested a copy of the invoice including Harrison in legal (your original point of contact).

Here's why this works.

This is a direct approach. It's not manipulative or dishonest. You're upfront about what you're looking for but you're also providing each recipient an incentive to share. If specific recipients just want to be in the loop they'll clarify their needs.

What if they don't?

They'll ignore you or give you a less than adequate answer, at which point you know. There's a problem and it's time to do some digging.

Scenario #2: Policy

You're working with a corporate client that has a specific policy mandate. You're working with multiple divisions in the company and you're expected to keep multiple contacts in the loop as a matter of policy. Your client wants you to exclude each division from being listed directly and just wants the company name on the invoice.

How to handle it:

This situation is fairly straight forward. You keep each contact in the loop and you treat them as a single client on paper. You verify the person that's actually responsible for paying the invoice. Then you treat each division as a separate client in practice.

What do I mean by that?

You cultivate a relationship with each of the people in your division. You provide them with the information they need. You go above and beyond, working to serve the team in each division. Then you work to expand the value you provide to each division.

Scenario #3: Flexibility

Your boutique firm has just been hired by a larger law firm. There are eight partners in the firm, and they all want copies of your invoice. You're expected to go to accounting for payment, but every once in a while one of the partners pays the invoice.

Then the inevitable happens.

You send a payment reminder to accounting and you get the runaround. "*Go see Gerald*" So you go to Gerald. "*Alison should be able to take care of that for you*." Your clients, the partners, they all love your work. But they seem to be completely disinterested in handling the minutia of *paying for your services*.

It's a difficult position to be in.

This has to be handled gently and with care. When clients don't pay, anger and frustration is a natural response to the problem.

But it's an unproductive one.

You'll need to determine the kind of client you're dealing with. Are you dealing with a client who is actually a deadbeat or are they simply a delinquent? Is it possible you're dealing with an avoider?

Remember our terms?

1. These are the clients who, for whatever reason, decide they don't want to talk about money. They may decide against "the talk" ahead of time or when it's time to pay. They may be embarrassed to discuss a financial problem, ashamed of something in particular or desperate to save face.

2. These clients may be confused about the payment terms. Or, they may stop paying when they run into trouble. These clients often demand favorable billing terms (e.g. net 30, net 60) if they're in dire straits, further complicating your cash flow dilemma. If they're mistaken for deadbeats the client/firm relationship may sour.
3. These clients have decided they'll accept your hard work but they won't pay your invoices. It could be an immediate problem but it's more likely to become a gradual one. These clients respond to consequences, not empathy. They're not interested in negotiating, they're focused on evasion.

You'll need to ask questions to identify the answer.

Here's a simple strategy you can use to flush out an answer from your cagey clients. You ask group questions to everyone on your contacts list, like this:

Hi everyone,

I wanted to thank each of you for your help with getting me the necessary items I need for the deposition in March. I'm confident we're set on that front.

I need help with a particular issue.

We reached out to accounting last week re: the outstanding invoice but we were told to check with the partners. I reached out each of you last week but I wasn't able to get a conclusive answer on payment. Who should we contact about this invoice and all other invoices moving forward?

I'm looking for a single point of contact on this.

Best,

[your name]

Attorney

If you're dealing with a group of avoiders, you'll need to press firmly for a commitment. If you're dealing with a delinquent, you may need to reach out to their support staff for more details. If you're dealing with a deadbeat you may need to establish penalties for non-payment.

These aren’t the only reasons for multiple contacts

But it’s all about the why.

Multiple contacts exist for a reason. You’ll need to flush out the *why* to get to the *what* and *how*. If you want to know how to handle these issues, you’ll need an answer to the why question.

Clients aren’t always forthcoming.

They aren’t always eager to share this important information. It’s up to you to find the answer. Your client has an inconvenient request.

They want you to send invoices to multiple contacts.

Your clients expect you to accommodate their every need. They expect you to provide more value for less. The implicit statement is clear. If you can’t do things the way they need you to, you may not be paid on time. Your clients may decide to find someone else.

Start with why.

With the right approach and a bit of digging, you’ll uncover the why. Ask why and you’ll have the intel you need to handle the what and how.

Try Bill4Time for free.