1. How Trevor Sheffield Streamlined His Business Operations with Bench and FreshBooks - YouTube

<https://www.youtube.com/watch?v=4hvQfrRKzp4>

Transcript:

[Music] foreign is pretty much working with small businesses on doing their visual advertising across you know primarily Google whether it's Google ads or doing search engine optimization you know SEO um I don't really dabble in social media at all but yeah my primary focus is just small businesses and doing digital advertising [Music] started with freshbooks first and since I'm a technology person I spent a lot of time evaluating my options because I knew from my background and like a digital operations position at a

large corporation that I didn't want to spend a lot of time switching back and forth between Services because there's a lot of lost energy and time and money and doing that so for me it was like I really wanted to start off on a strong Foundation one point they sent me an email saying you know hey we've opened up this integration in the bench we're a partner of ours and that got my attention and I was like well let me check this out because like I knew that accounting was really important and

make sure that my books were in order and it's honestly personally something that I just do not like I don't want to spend time on it it was something I was very eager to just Outsource and be like I will gladly pay someone a reasonable sum to just make sure my books are good as soon as I could I immediately jumped on bench and I was like okay I've got six months of like back books that needed to get done please help me with that and and they did that and help me get ready for everything in order for

taxes [Music] I wanted that peace of mind of being like I can just hand this off and not have to worry about it you know um and so that was the main thing and that has been the case ever since like every once in a while you know they ask me questions like hey is this um you know how should this be classified or whatever um but I love that it was all online like I didn't want to have to deal with going to somebody in person I didn't want to have to deal with uh phone calls and meetings and all that kind of stuff

it was all just like a live chat interaction of course I could schedule a meeting if I wanted to but for me it was just the the Simplicity and the Streamline like digital process of everything um that really failed to me [Music] one thing that's really useful to me is the p l right so like pricing is such a critical part of what I do initially I began as just like well here is what my hourly rate was at my previous employer and as time has gone on I've learned a lot more about how well if I reference my p l data

which is accurate because I have good bookkeepers that are staying on top of it every month then I can look at that from like a monthly quarterly an annual perspective with this information I can now forecast and be like well if I want to well a do I need to change my pricing and have that based off of actual expenses and then build in profits and any like future planning like oh I want to add in this additional service or I want to hire somebody or I want to do this other thing then that for me is so pretty cool

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