

The Profit Protection Templates™

Ready-to-Use Tools That Make The Do It Now Profit System™ Work Immediately

Stop Building From Scratch (That's Just Another Way to "Figure It Out Later")

Let me guess what happened when you finished The Do It Now Profit System™. You were excited. You totally got it. You understood the revenue-cost-profit connection, you saw exactly how this would transform your financial clarity, and you thought, "Okay, I'm going to set this up tomorrow."

Except tomorrow came, and you opened a blank spreadsheet, stared at it for three minutes, got overwhelmed trying to figure out the formulas, and thought "I'll finish this on the weekend when I have more time."

Yeah. I've seen this movie a thousand times in my 12 years as a bookkeeper.

Here's what I've learned: The difference between coaches who actually implement profit visibility systems and coaches who just think about implementing them isn't motivation or knowledge. It's friction. Every single thing you have to "figure out" or "build from scratch" is another opportunity to defer implementation.

And deferring implementation of financial systems? That's just the same "figure it out later" mentality with better intentions.

The Profit Protection Templates™ eliminate that friction completely. Every tracker, template, and tool from The Do It Now Profit System™ is pre-built, pre-formatted, and ready to use right now. No formulas to figure out. No layouts to design. No "I'll set this up when I have time."

Just copy your information into the fields and immediately see your profit picture.

This isn't a different system or additional approach — it's the exact same Do It Now framework, except instead of building everything yourself, you're getting the professional-quality tools I've refined over 12 years of implementing these systems with hundreds of clients.

Within 24 hours of getting these templates, you'll have your complete profit tracking system built and operational. Not "mostly set up" or "I'll finish it this weekend." Actually working. Actually showing you real numbers.

Because here's what I know after cleaning up thousands of dollars worth of financial messes: The fastest way to turn good intentions into expensive problems is adding setup delays between decision and action.

Let's eliminate those delays right now.

What The Profit Protection Templates™ Actually Do

Remember the core insight from The Do It Now Profit System™? That breakthrough moment when you finally understood that every client engagement has three financial components: what they paid you, what it cost you to deliver, and the actual profit left over?

That connection is simple to grasp. But tracking it consistently? That's where most coaches stumble.

Not because it's complicated. Because building tracking systems from scratch creates just enough friction to make you put it off.

The Profit Protection Templates™ eliminate that friction by giving you every tool you need, ready to use right now:

Client Project Financial Tracker — The exact template for connecting revenue to costs for each client engagement. Fill in the fields as you work, and the profit calculation happens automatically. No formulas to figure out. No layout to design.

Monthly Profit Dashboard — Your complete profit picture on a single page. Pre-formatted with the categories coaches actually need, not generic business categories that don't match your work.

Expense & Bill Management System — An organized structure for tracking what you spend and what you owe, designed around the reality of coaching businesses. Software subscriptions, contractor payments, platform fees — the actual expenses you deal with.

Invoice Follow-Up System — Templates for getting paid faster without the awkwardness, plus a tracker showing exactly who owes you what and when to follow up.

Professional Handoff Package — The documentation your bookkeeper or accountant will actually thank you for, formatted exactly how financial professionals expect to receive information.

Quick Reference Guides — One-page summaries of the key concepts from The Do It Now Profit System™, designed to keep you on track when you're implementing mid-project and can't remember exactly what goes where.

Every template follows the same principle: Remove the delay between "I should track this" and actually tracking it.

Here's what I've learned after 12 years of working with coaches: The difference between maintaining profit visibility and slipping back into shoebox mentality usually comes down to about 48 hours. That's how long it takes for "I'll set this up properly this weekend" to become "I'll deal with this at tax time."

These templates protect your profit by protecting your implementation.

The Client Project Financial Tracker

Your Revenue-Cost-Profit Connection, Pre-Built

This is the centerpiece of The Do It Now Profit System™ — the tool that finally shows you whether that client you just finished working with was actually profitable or just felt successful because the invoice looked good.

The concept is simple: Track what they paid you, track what it cost you to deliver the work, see the real profit. But building this tracker from scratch? That's where coaches get stuck. Which categories do you need? How do you handle costs that spread across multiple clients? What about those subscription costs — do they count for this client or overall business?

I've answered these questions literally hundreds of times. So I built the tracker that already has the answers.

What's Actually In The Template

The Client Project Financial Tracker is formatted as a single-page document you fill out for each completed client project. Here's what it captures:

Revenue Section:

- Primary service fee (the main deliverable they paid for)
- Additional services or add-ons
- Reimbursable expenses they covered
- Total project revenue (auto-calculated)

Direct Cost Section:

- Contractor or vendor payments specific to this client
- Tools or software purchased for this project
- Advertising or lead costs if tracked per client
- Materials or resources specific to this deliverable

Allocated Cost Section:

- Your time investment (hours × your target hourly value)
- Portion of ongoing software and tools (calculated by usage percentage)
- Administrative time (client communications, invoicing, scheduling)

Profit Calculation:

- Total Revenue - Total Costs = Actual Profit
- Profit Margin Percentage (auto-calculated)
- Profit per Hour of Your Time (auto-calculated)

The template includes the exact formulas you need, pre-built. You just enter your numbers in the designated fields, and the calculations happen automatically.

How to Use It (Without Overthinking It)

When you complete a client project — whether that's a one-time intensive, the end of a monthly retainer period, or finishing a package of sessions — you fill out one tracker. Takes about 10 minutes if you've been capturing expenses as you went (which The Do It Now Profit System™ taught you to do).

For coaches working primarily with retainer clients: Fill out a tracker at the end of each month for each active retainer. This shows you whether that monthly fee is actually profitable or just consistent.

For consultants doing project-based work: Fill out a tracker when you deliver the final component and send the final invoice. This captures the complete picture before you move on to the next project.

For coaches with a mix of offerings: Use judgment about what constitutes a "project." A six-week group program? One tracker at completion. Monthly one-on-one clients? One tracker per month per client. The key is capturing complete revenue-cost cycles, not tracking every individual session.

Here's the thing: If you're working from home using mostly software tools you already own, your allocated costs will be fairly consistent across clients. The first time you fill out the tracker, you'll do some calculation to determine "what percentage of my Zoom subscription should I allocate to this client who used 4 hours of my 100 available monthly hours?" But then you'll have a standard approach you can replicate.

After you've completed three client trackers, you'll spot patterns immediately. "Oh, intensive VIP days are way more profitable per hour than ongoing monthly clients," or "Hmm, that group program I thought was my cash cow is barely profitable once I account for my time."

That's the entire point. See the truth so you can make better decisions.

What This Actually Looks Like

Client Project Financial Tracker — Part 1: Revenue & Direct Costs

Client Name: _____

Project Type: _____

Completion Date: _____

REVENUE:

Primary Service Fee: \$_____

Additional Services: \$_____

Reimbursable Expenses: \$_____

TOTAL REVENUE: \$_____

DIRECT COSTS:

Contractor/Vendor Payments: \$_____

Project-Specific Tools/Software: \$_____

Advertising/Lead Costs: \$_____

Materials/Resources: \$_____

Client Project Financial Tracker — Part 2: Allocated Costs & Summary

Client Name: _____
Project Type: _____
Completion Date: _____

ALLOCATED COSTS:

Your Time (_____ hours × \$_____ /hr): \$_____

Software/Tools (_____ %): \$_____

Administrative Time (_____ hours × \$_____ /hr): \$_____

TOTAL COSTS: \$_____

ACTUAL PROFIT: \$_____

Profit Margin: _____ %

Profit Per Hour: \$_____

Notes/Observations:

Just fill in the blanks. The math happens automatically in the spreadsheet version.

The Monthly Profit Dashboard

Your Complete Financial Picture on One Page

The Do It Now Profit System™ taught you to do quick weekly profit checks — that 15-minute Friday review where you verify you're capturing everything and staying on track. That's essential for building the habit.

But you also need a monthly view that shows your complete financial picture at a glance. Not just "did I make money this month?" but "where did my profit actually come from, and what's the trend?"

The Monthly Profit Dashboard gives you that view without requiring an accounting degree to interpret it.

What The Dashboard Actually Shows

This is a single-page monthly summary that takes about 20 minutes to complete at month-end. It pulls data from your individual Client Project Financial Trackers plus your ongoing expense tracking.

Here's what it captures:

Revenue Summary:

- Total revenue by offering type (VIP days, monthly retainers, group programs, etc.)
- Number of clients/projects completed
- Average revenue per client/project

Cost Breakdown:

- Total direct costs (things you paid specifically for client delivery)
- Total allocated costs (your time, ongoing software, administrative overhead)
- Cost categories as percentages of total costs

Profitability Metrics:

- Total profit for the month
- Profit margin percentage
- Profit per client/project
- Comparison to previous month (up/down/flat)

Cash Flow Reality Check:

- Outstanding invoices (money you're owed)
- Unpaid bills (money you owe)
- Actual cash available

The dashboard uses simple visual indicators — arrows for trends, basic percentage breakdowns — so you can understand your financial situation in under 60 seconds. When you're running a coaching business, you don't have time to analyze complex financial reports. You need to glance at a page and know: Am I profitable? Is the trend good? Do I need to adjust anything?

Why This Matters More Than You Think

Here's what I see constantly: Coaches track revenue but not profit, so they have big revenue months that feel successful but are actually less profitable than smaller revenue months because of how the costs lined up.

Let me paint you a picture. You do three VIP intensive days in a month — high revenue, fairly low time investment. The next month, you deliver two group programs — decent revenue, but massive time investment. The group program month might show higher revenue, but when you account for your time as a cost, the VIP month was significantly more profitable.

Without the monthly dashboard, you think "I should do more group programs because the revenue looks good." With the dashboard, you see "Wait, my profit per hour is three times higher on VIP days."

That's a business-changing insight. It's sitting right there in your numbers — you just need to see it clearly.

Using The Dashboard For Decisions, Not Just Tracking

The real power isn't just knowing your numbers. It's using them to make better decisions about what work to pursue.

After three months of dashboard data, you can answer questions like:

- Which offering should I promote more heavily?
- What should I price that new service at to maintain my profit margins?
- Can I afford to hire help, and what tasks should I delegate first?
- Am I better off taking on more clients or increasing prices?

These aren't theoretical questions you answer based on hunches. You're looking at actual data from your actual business.

Here's the key: You can show this dashboard to a financial professional and they'll immediately understand your business. Instead of paying them to figure out your profit picture, you're paying them to help you optimize it. That's the difference between expensive cleanup and strategic advice.

Monthly Profit Dashboard Summary

Category	This Month	Last Month	Change
Total Revenue	\$_____	\$_____	____%
Total Costs	\$_____	\$_____	____%
Actual Profit	\$_____	\$_____	____%
Profit Margin	____%	____%	____%
Active Clients	_____	_____	_____
Avg Profit/Client	\$_____	\$_____	____%

Fill this in monthly using data from your Client Project Financial Trackers, and you'll spot trends immediately.

The Expense & Bill Management System

Stop Losing Receipts and Forgetting What You Owe

The Do It Now Profit System™ introduced you to the 2-minute rule for expenses: When you spend money on the business, capture it immediately. Take a photo of the receipt, note what it was for, move on with your day.

But capturing expenses is only half the system. You also need somewhere to organize them that actually makes sense for a coaching business.

The Expense & Bill Management System is that somewhere.

The Problem With Generic Expense Categories

Most expense trackers are designed for generic businesses, which means they have categories that don't match how coaches actually spend money. "Office Supplies" and "Equipment" sound reasonable until you realize that as a coach, you're not buying filing cabinets — you're managing fifteen different software subscriptions at \$15-\$50 each.

This system uses categories that reflect coaching business reality:

Platform & Software Costs:

- Coaching platform subscription
- Video conferencing tools
- Email service provider
- Scheduling software

- Payment processing fees
- Client management system
- Any other monthly software costs

Professional Development:

- Certifications and training programs
- Conferences and events
- Mastermind memberships
- Books and courses

Business Operations:

- Virtual assistant or contractor payments
- Bookkeeping services
- Legal or accounting fees
- Business insurance
- Bank fees

Marketing & Client Acquisition:

- Advertising spend (Facebook, Google, etc.)
- Website hosting and maintenance
- Lead generation tools
- Content creation costs

Client Delivery Costs:

- Materials or workbooks for clients
- Gifts or client appreciation
- Specialized tools for specific programs

The Expense Tracker Template

For each expense, you'll capture:

- Date of expense
- Vendor/who you paid
- Amount
- Category (from the list above)
- Which client it's associated with (if applicable)
- Payment method (business credit card, bank account, etc.)
- Status (paid immediately vs. billed and due later)

The template is set up as a simple running log. Each time you spend money or receive a bill, you add a line. At the end of the month, you can sort by category to see where your money went.

For expenses you pay immediately (like buying a course or paying for software): Record it the day you pay it, note "Paid" in the status column.

For bills you receive but pay later (like contractor invoices or monthly subscriptions): Record it when you receive the bill with "Due [date]" in the status column. When you pay it, update the status to "Paid [date]."

This simple distinction prevents the nightmare scenario where you think you have more cash available than you actually do because you forgot about bills due next week.

The Bill Payment Tracker

This is a separate tool specifically for managing what you owe and when it's due.

Here's what I see happen constantly: Coaches track expenses they've already paid, but they don't track bills coming due until they're overdue and vendors are sending reminders.

Late payment fees are a stupid tax. Don't pay it.

The Bill Payment Tracker shows:

- Vendor name
- Amount owed
- Due date
- Payment method you'll use
- Status (Pending, Paid, Late)
- Notes (like payment terms or confirmation numbers)

Each month starts with a fresh tracker. At the beginning of the month, you list all known bills coming due that month. As new bills arrive, you add them. As you pay bills, you mark them paid.

This takes about five minutes at the start of each month and prevents hundreds of dollars in late fees annually. If you think I'm exaggerating, add up what you paid in late fees last year. I'll wait.

Integration With The Profit System

Remember how The Do It Now Profit System™ teaches you to connect revenue with costs? These expense trackers make that connection visible.

When you're filling out a Client Project Financial Tracker, you'll reference your expense log to pull the costs associated with that client. Having everything organized by category and client makes that process take minutes instead of hours of hunting through bank statements.

And when you're completing your Monthly Profit Dashboard, you'll use the expense tracker's category totals to understand where your money is actually going. Maybe you'll discover you're spending \$300/month on software tools you barely use. Or that your marketing costs are 40% of revenue, which explains why your profit margins are lower than you'd like.

These insights don't come from complex analysis. They come from simple, consistent tracking with categories that actually match your business.

[Error: Could not parse tracking-log format]

Capture every expense when it happens, not when you feel like updating your books.

The Invoice Follow-Up System

Get Paid Faster Without Being Awkward

The Do It Now Profit System™ teaches you to track costs and see profit clearly. But here's what often gets missed: actually collecting the money you're owed.

I've seen coaches with \$10,000 in outstanding invoices who think they're "having a slow month" because their bank account is lower than expected. That's not a slow month. That's a collection problem.

The Invoice Follow-Up System gives you ready-to-use templates and a simple tracking method that solves this.

The Reality of Payment Collection

Most coaches hate following up on unpaid invoices. It feels pushy or awkward, especially when you've built a relationship with the client. So you send an invoice, hope they pay it, and if they don't, you wait longer than you should to say something.

Meanwhile, the client didn't intentionally ignore you — they just forgot, or the email went to spam, or they meant to pay it and other things took priority.

The solution isn't being more aggressive. It's being more systematic.

When you have a clear follow-up schedule and professional templates, you're not making up what to say each time or wondering "is it too soon to follow up?" You're just following your system.

The Invoice Tracking Template

This tracker shows every invoice you've sent that hasn't been paid yet:

- Client name
- Invoice number and date sent
- Amount owed
- Payment due date
- Last follow-up date
- Follow-up stage (First reminder, Second reminder, Final notice)
- Status (Sent, Overdue, Paid)
- Payment received date

Update this weekly during your Friday profit check. It takes about three minutes and prevents you from forgetting who owes you what.

The Follow-Up Email Templates

These are pre-written emails for each stage of follow-up. You fill in the specific details (client name, invoice amount, due date) and send them according to your schedule.

Friendly Reminder (Sent on due date if not yet paid):

"Hi [Name], just a friendly reminder that invoice #[XXX] for \$[amount] was due today. If you've already sent payment, please disregard this message! If not, you can pay via [payment method] at your convenience. Let me know if you have any questions. Thanks!"

Second Follow-Up (One week after due date):

"Hi [Name], I wanted to follow up on invoice #[XXX] for \$[amount], which was due on [date]. I haven't received payment yet, so I wanted to check if there were any issues or questions about the invoice. Please let me know how I can help get this resolved. Thanks!"

Final Notice (Two weeks after due date):

"Hi [Name], Invoice #[XXX] for \$[amount] is now [X] days overdue. I need to receive payment by [specific date] to avoid late fees and keep your account in good standing. Please let me know when I can expect payment, or if there's an issue we need to discuss. Thank you."

Notice the progression: friendly assumption of good faith, then direct inquiry, then clear consequences. This matches how most client relationships actually work — they didn't mean to be late, but you do need to get paid.

Your Follow-Up Schedule

Here's the system that works for most coaching businesses:

Day invoice is sent: Note the due date in your tracker (typically 7-14 days from send date, depending on your payment terms).

Day before due date: Check if payment has arrived. If not, prepare to send the first reminder tomorrow.

Due date (if unpaid): Send the friendly reminder email.

3 days after due date: Check again. If still unpaid, note "First reminder sent" in your tracker and set a calendar alert for one week out.

7 days after due date: Send the second follow-up email. Update your tracker with "Second reminder sent."

14 days after due date: Send the final notice with a specific deadline and consequences. If this doesn't produce payment, it's time for a phone call or a more serious collection approach.

This schedule is firm enough to get paid but gracious enough to maintain relationships. Most invoices get paid after the first or second reminder — clients genuinely forgot or the email got lost.

The small percentage that don't? Now you know you have a real issue that requires direct conversation, not just another "checking in" email.

Impact on Your Profit Picture

When you track and follow up systematically, you typically see two immediate improvements:

Faster payment cycles: Clients who might have paid 30+ days after invoice start paying within 7-14 days because you're following up promptly.

Clearer cash flow: You know exactly what's coming in and when, rather than being surprised when someone finally pays an invoice you'd forgotten about.

Here's why this matters for profit visibility: Outstanding invoices are part of your financial picture. They're money you've earned but haven't received yet. The Invoice Tracking Template integrates directly with your Monthly Profit Dashboard, showing you the difference between "profit earned" and "cash in hand."

That distinction matters when you're deciding whether you can afford to hire help or invest in a new program. Earned but not yet collected doesn't spend the same as cash in the bank.

The Professional Handoff Package

Make Your Bookkeeper or Accountant's Job Easier (and Cheaper)

The Do It Now Profit System™ gets your finances organized so you're not paying professionals to untangle chaos. But there's a level beyond "not a mess" — you can actually deliver your financial information exactly how bookkeepers and accountants want to receive it.

When their job is easier and faster, your bill is smaller. More importantly, they're giving you strategic advice instead of cleanup services.

The Professional Handoff Package is what financial professionals actually want from you, formatted exactly how they want it.

What Financial Professionals Actually Need

I've been on the receiving end of client handoffs for 12 years. I know exactly what makes me smile versus what makes me sigh when I open a new client's files.

What makes me smile:

- Clear, consistent organization — everything in predictable locations
- Business and personal expenses separated (not hunting through charges asking "which dinner was business?")
- Categorized expenses with quick notes when the purpose isn't obvious
- Complete documentation organized by month — receipts, invoices, bank statements all there
- A summary document explaining the business model and revenue streams

What makes me sigh:

- Shoebox of unsorted receipts with no context
- Bank statements with handwritten margin notes
- Personal and business transactions mixed together with no indication which is which
- Missing documentation ("I know I have that receipt somewhere...")
- Vague expense descriptions ("What's this \$500 charge to 'J. Smith Consulting'?")

The difference between these two scenarios? Typically 5-10 hours of billable work.

At \$100-150/hour for bookkeeping services, that's \$500-1,500 in fees you're either paying or not paying based purely on how organized you are.

The Professional Handoff Package puts you in the "makes them smile" category every single time.

The Package Components

Business Overview Document:

This one-page summary explains your business model, revenue streams, and typical expense categories. It gives your bookkeeper or accountant context for understanding your numbers.

Includes:

- Business name and structure (sole proprietor, LLC, etc.)
- Primary services and how you generate revenue
- Typical expense categories specific to your business
- Any unusual transactions they should understand
- Your fiscal year and tax filing details

Monthly Financial Summary:

This template organizes all your financial activity for the month in the format bookkeepers expect:

- Revenue by category (pulled from your Client Project Trackers)
- Expenses by category (from your Expense Tracker)
- Outstanding invoices (from your Invoice Follow-Up System)
- Unpaid bills (from your Bill Payment Tracker)

- Month-end bank balance and reconciliation notes

Document Organization Guide:

Clear instructions for how you've organized receipts, invoices, and statements — whether you're delivering physical or digital files.

For digital delivery:

- Folder structure by month, then by category
- File naming convention (Date_Vendor_Amount_Category)
- Cloud storage or file transfer method

For physical delivery:

- Envelope system by month
- Separation of receipts (expenses) from invoices (revenue)
- Note system for any unusual items

Questions and Notes Section:

A simple template for noting anything you're unsure about or that needs professional judgment.

Example questions:

- "Is this training program fully deductible or does it need to be depreciated?"
- "I used my personal credit card for a business expense — how should I handle this?"
- "Client paid late with penalty interest — how do I categorize that?"

Instead of interrupting your bookkeeper mid-work with questions, you compile them here for efficient batch answering.

When and How to Use This

If you're working with a bookkeeper monthly, you'll hand off these materials each month. Takes about 15 minutes to compile everything you've already tracked throughout the month.

If you're doing your own bookkeeping but having an accountant review quarterly or annually, you'll hand off multiple months at once. Each month is independently organized using the same system.

Here's what this does: Your bookkeeper can work through your information without constantly stopping to ask clarifying questions or hunt for missing pieces. That's what saves you hours of billable time.

But here's the bigger benefit — when financial professionals aren't spending time figuring out what your transactions mean, they have time to give you strategic advice.

"Have you considered structuring this differently for tax purposes?"

"Based on these patterns, here's what I'd recommend for next quarter."

That's the difference between paying for cleanup and paying for strategy.

Integration With Your Profit System

Notice how the Professional Handoff Package uses the exact same tracking tools you're already using for your own profit visibility:

- Client Project Financial Trackers provide the revenue breakdown
- Expense Tracker provides the categorized costs
- Invoice Follow-Up System shows outstanding receivables
- Bill Payment Tracker shows outstanding payables
- Monthly Profit Dashboard summarizes everything

You're not creating separate documentation for your bookkeeper. You're using your own profit tracking system and sharing it in professional format.

This matters: Financial professionals want to see the same information you need for running your business. There's no conflict between profit visibility for you and professional-ready books.

It's the same thing, organized clearly.

Quick Reference Guides & Implementation Support

Keep The Core Concepts Accessible When You Need Them

You understand The Do It Now Profit System™ — the revenue-cost-profit connection, the 2-minute expense capture rule, the weekly profit check, the monthly dashboard review. The concepts make sense.

But here's the thing: Understanding a system and remembering every detail while you're in the middle of client delivery are two different things. You're going to have moments where you think, "Wait, which category does this expense go in?" or "How do I handle costs that spread across multiple clients?"

The Quick Reference Guides solve this. They distill the key concepts into one-page summaries you can glance at without re-reading the entire system.

The Transaction Connection Quick Guide

This one-pager reminds you of the core insight: Every completed client interaction has three financial components.

When you see revenue, ask:

- What did they pay me? (Primary service fee)
- What additional revenue came from this? (Add-ons, upgrades, reimbursables)
- What's the total they paid for this complete interaction?

When you track costs, ask:

- What did I pay someone else specifically for this client? (Direct costs)
- What portion of my ongoing expenses should be allocated here? (Software, time, admin)
- What's the total it cost me to deliver this?

When you calculate profit:

- Revenue - Costs = Actual Profit
- Actual Profit ÷ Revenue = Profit Margin %
- Actual Profit ÷ Hours Invested = Profit Per Hour

That's it. Those three questions capture the entire system. When you're filling out a Client Project Financial Tracker mid-month and get confused, this guide gets you unstuck in 30 seconds.

The Expense Category Guide

This is your reference for "where does this expense go?" decisions.

Pre-written guidance for common coaching expenses:

- Software subscriptions → Platform & Software category, allocated across clients by usage
- Training programs → Professional Development, full cost in month purchased
- Contractor payments → Client Delivery Costs if project-specific, Business Operations if general
- Your time → Always allocated as a cost, calculate based on target hourly value
- Meals and entertainment → Only client-related meals count, track which client
- Marketing costs → Track by campaign when possible to assess ROI

The guide also includes the decision tree for "is this a direct cost or allocated cost?"

Direct cost criteria:

- I wouldn't have paid this without this specific client
- It was purchased specifically for delivering this client's work
- It's a one-time expense tied to this project

Allocated cost criteria:

- I pay this regularly regardless of specific clients

- Multiple clients benefit from this expense
- It's part of ongoing business operations

When you're capturing an expense and wondering how to categorize it, this guide gives you the answer without re-reading the entire methodology.

The Weekly Profit Check Checklist

This is your Friday 15-minute review process in checklist format:

Weekly Profit Check Checklist

Date: _____

- All expenses from this week captured in tracker
- All bills received added to payment tracker
- All invoices sent added to invoice tracker
- Any payments received marked in invoice tracker
- Any bills paid marked in bill payment tracker
- Quick review: Completed projects need Project Tracker?
- Quick review: Any overdue invoices needing follow-up?
- Quick review: Any bills due next week needing attention?

Notes or Issues for Next Week:

Print this and keep it visible on Friday afternoons. Just work through the checklist — takes 10-15 minutes, keeps you current.

The purpose isn't creating perfect books. It's maintaining consistent awareness of your financial picture. When you do this weekly, the monthly dashboard completion is easy because nothing's been forgotten for weeks.

The Automation Setup Guides

These are step-by-step instructions for setting up common automation that makes the Do It Now system even easier:

Receipt Capture Automation:

- Using phone camera and cloud storage
- Email-to-folder automation for digital receipts
- Auto-forwarding for subscription receipts

Bill Payment Reminders:

- Calendar automation for recurring bills
- Bank account alerts for low balances
- Vendor payment portal setup

Invoice Follow-Up Automation:

- Email scheduling for payment reminders
- Calendar triggers for follow-up dates
- Payment confirmation automation

Each guide includes multiple tool options — doesn't require specific software. The focus is on using free or low-cost solutions you likely already have access to.

First Week Implementation Checklist

This guide shows you exactly where to start with all these templates:

Day 1:

- Set up your expense tracking template
- Create your first bill payment tracker for this month
- Set up your invoice tracking template

Day 2:

- Create folder structure for receipt organization
- Set up automation for receipt capture
- Fill out Business Overview for Professional Handoff

Day 3:

- Complete your first Client Project Financial Tracker for most recent completed client
- Review the profit numbers — this is your baseline

Day 4:

- Set up your Monthly Profit Dashboard
- Fill in with current month data so far
- Note any gaps in your tracking

Day 5:

- Do your first Weekly Profit Check using the checklist
- Address any overdue invoices or bills
- Set Friday calendar reminder for weekly checks

By the end of week one, you have every template operational and have experienced the complete system. You're not still "planning to set this up" — you're using it.

Making This Actually Work (Not Just Collecting Templates)

Let me be direct about something: You now have every template, tracker, and tool from **The Do It Now Profit System™** in ready-to-use format. This is exactly what you need to maintain clear profit visibility without building anything from scratch.

But having tools and using tools are different things.

I've given these exact templates to hundreds of coaches over 12 years. Some implement them immediately and transform their financial clarity within weeks. Others download them, feel excited about finally getting organized, and then never actually fill them out.

The difference isn't motivation or knowledge. It's momentum.

The 24-Hour Commitment

Here's what works: Commit to implementing these templates within 24 hours of getting them. Not "I'll do this on the weekend when I have time." Not "Let me finish this client project first."

Within 24 hours.

That doesn't mean completing every single template perfectly. It means:

- Setting up the files and folders
- Filling out your first Client Project Financial Tracker for your most recent completed client
- Adding your current bills to the Bill Payment Tracker
- Listing your outstanding invoices in the Invoice Tracker

Those four actions take maybe 45 minutes total, and they create immediate momentum. You see actual numbers in the templates. You experience how the system works. You're not "planning to implement" — you're using it.

Then the next day, you capture expenses as they happen instead of letting them pile up. You check your bill tracker before paying bills instead of paying randomly. You follow your invoice follow-up schedule instead of hoping clients remember to pay.

Momentum builds from action, not planning.

The Friday Non-Negotiable

The Weekly Profit Check is your anchor. Friday afternoon, 15 minutes, non-negotiable.

I don't care if you've had a chaotic week and didn't track anything properly. That's exactly when you most need the Friday check — to catch everything that slipped through before it becomes a bigger mess.

Treat this like a client appointment you would never cancel. It's that important.

Because here's what I've observed: Coaches who do the Friday check consistently stay current with their tracking. They catch issues early. They maintain profit visibility even during busy periods.

Coaches who skip the Friday check "because it's been crazy" slide back into chaos. Two missed Fridays becomes four becomes "I'll catch up at month-end" becomes "Oh god, it's tax time and I have no idea what happened."

Don't be that coach.

When You Fall Behind (Because You Will)

Let's be realistic: You're going to have a week where you forget to capture expenses or skip the Friday check or lose track of which client paid what invoice.

This doesn't mean the system failed. It means you're human.

Here's how to recover without spiraling:

If you miss a Friday check: Do a catch-up session Monday morning. It'll take 30 minutes instead of 15, but you'll be current again.

If you forget to track expenses for a week: Spend 20 minutes with your bank statement and credit card records. You'll remember what the charges were for. It's annoying but not impossible.

If you let invoices pile up without follow-up: Don't try to send every overdue reminder at once. Just get current with where everything stands, then resume normal follow-up schedule going forward.

The key is treating recovery as normal maintenance, not evidence of failure. You're not "restarting" the system. You're just catching up after a busy period.

This happens to everyone. The difference between coaches who maintain profit visibility long-term and those who slip back into chaos is how they handle recovery.

Support Without Adding Complexity

These templates are designed to work without additional software, special tools, or complicated setups. You can implement everything with:

- A spreadsheet program (Google Sheets, Excel, whatever you already use)
- Your phone camera (for receipt capture)
- Your email (for invoice follow-up)
- A folder system (physical or digital)

If you want to use specialized bookkeeping software later, great. These templates will make migration to any system easier because you'll understand what data needs to be tracked.

But you don't need specialized software to get started. You need consistent implementation of simple tracking, and these templates give you that.

The Real Goal Here

Remember what **The Do It Now Profit System™** is actually solving: You're a successful coach or consultant who's been operating blind to your actual profitability. You can quote your gross revenue but you're guessing at profit margins. You're making business decisions based on hope instead of data.

These templates eliminate that blindness. Within a month of using them consistently, you'll know:

- Which clients or projects are genuinely profitable versus just busy
- Where your money is actually going each month
- Whether you can afford decisions you're considering
- What your bookkeeper or accountant needs to help you strategically

That's not theoretical financial knowledge. That's practical business intelligence you'll use every single week.

And it comes from doing the same simple tracking repeatedly until it becomes automatic. Not complicated analysis. Not hours of financial study. Just consistent use of these ready-to-use tools.

You've already invested in **The Do It Now Profit System™**. You understand the methodology. Now you have every template pre-built and ready to implement.

The only thing standing between you and complete profit clarity is actually using them.

So open the files. Fill in the first tracker. Set your Friday calendar alert. Start now.

Because "figure it out later" just became "figured out right now."

