

back to basics #6

Client Management

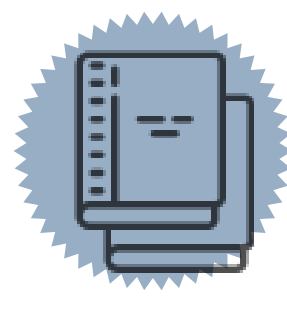
Client management is an important aspect of running a professional, organised business, and gives your clients peace of mind in the service you provide and the organisation of your yard.



Client Details

Knowing who your clients are

It's important to have details of your clients, and their horses. This can include their contact details, details of the horse, insurance and vaccination details, preferences for care, and next of kin. These should all be kept securely on file according to GDPR practices. Even requesting proof of ID and address is not unreasonable, and can be useful in the event of any issues arising. These details should be reviewed regularly and updated. If you offer anything more than pure DIY, you should also hold the Horse Passports on the yard.



Keeping Records

Staying up to date

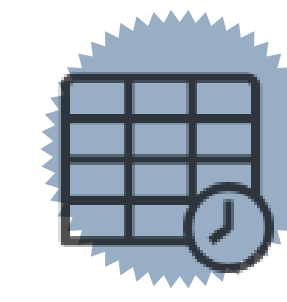
If you offer assisted services, keeping records of things such as farrier visits, vaccinations, worming programmes, and other aspects of routine care for the equines on the yard can be beneficial in ensuring their health and welfare, and also helps with the organisation and management of such services and procedures.



Livery Contracts

The basis of your services

Livery contracts should be issued to all clients, and a copy should be kept on file with the other client details. Livery contracts should be reviewed regularly to ensure they are still relevant to the services and facilities provided.



Facility Use

Manage your facilities too

If you require facilities- such as the arena- to be booked, then having a system to do this can be useful as well to communicate availability and, if necessary, allow appropriate charges to be applied. This applies not only to liveries but can also be used for external users for facility hire, or if the facilities are unavailable due to events or maintenance.



Pricing and Invoicing

Charge for the chargeable

Making sure you are pricing your services and invoicing correctly is key to a viable business. You should have suitable recording methods for billing livery packages and extras. Invoices should be issued promptly each month, with clear payment terms. You should have processes in your contract for late or missing payments, and should implement these when needed. Having an app or system to record billable services, which is linked to an accounting tool, or that allows automated billing can also save time each month, and ensure that nothing is missed.



Client Communication

Staying clear and professional

Direct communication with clients is key. It is important to remain professional at all times as this is a business arrangement, and consider language used. WhatsApp or Facebook, whilst useful for sharing general information and yard chat, should not be used as the main source of communication. Important communication, such as price increases or serving notice, should be done in writing directly to clients.



Extra Services

Keeping track of services and staffing

Having a simple, but effective, way for clients to request services or extras is also important, and helps when it comes to managing daily tasks. Especially if you have a high demand for additional services, or know that there are appointments to be arranged such as the farrier or vet, this can help you organise the correct staffing, save on unnecessary labour and mean everyone knows what needs to be done on a day-by-day basis. Having a clear system in place that is used by all will ensure that each and every extra is invoiced at the end of the month. You should also make sure that your service prices are updated regularly.