

Sending Invoices

Hi all - I am a true newbie at being solo, and am just now sending out my first two invoices (yay!)! I am using MyCase so it has a built-in feature to print invoices, but when sending the invoice should I include anything else? A brief letter just stating that the enclosed is their invoice? A return envelope for payment? Anything else I'm not thinking about?

Thanks!

Take it as an opportunity to update the client about their matter - a brief note should be sufficient. You could also thank them for the opportunity to represent them.

Walter D. James III, Texas

The sending of an invoice is not a billable event so do not include any case related materials. Pay the additional postage and send the case related postage in a different envelope so that the contents may be billed.

Send bills on at least a monthly basis. For those who are not maintaining their retainer or are complainers, bill more frequently. Make the bill informative so that the client can see what you are doing for them. For instance:

0.3 Telephone conference with client. Requested client forward financial documents including federal tax returns for the past three tax years and most recent four paystubs for all employers. Discussed the importance of these documents in establishing client's earning capacity.

Rather than "0.3 Called client."

Billing time and expenses should be easy if they are spelled out in the written representation agreement (e.g., one-tenth of an hour increment, expenses/costs are all out-of-pocket expenses including but not limited to...).

One theory is that clients pay faster when they have to do less work. This is where the self-addressed, stamped return envelope comes in. Try it and see if it works for you. This was popular in the past, before online bill paying. Many clients have automatic pay or online bill paying and you making them write the check is out of the norm anyway. If you accept credit cards it may be more effective (less overhead) to simply place a statement at the bottom of the bill stating that the bill can be paid via credit card by calling your office (provide the number). Some people have ditched the envelop idea due to the rising cost of postage and envelopes as well as the difficulty in getting people to pay in the first place. Your signature block does not state where you are from so I cannot comment on the likelihood of success based upon your geography. Like marketing, it is a cost-benefit analysis. Try it and see if it is effective. You may decide it works on some clients (and continue) where it does not on others (stop using it on them).

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I hope this is helpful.

Very truly yours,
Bill

William M. Driscoll, Massachusetts

Nothing else is really required. I would be a little careful about establishing a precedent here. While it is one thing to include a note about the status of their case and an envelope for only two bills, this can quickly become onerous with a higher volume of invoicing.

Just as with training puppies, what you do early on will determine the expected behavior later.

Nancy Duhon, Georgia

I will not comment on what else to do as I am not an attorney and the others have already covered it all. I would suggest to you that if you have not enabled an online credit card payment feature to accompany your invoices, that you investigate that option and enable it to electronically transfer with the invoice. Giving clients the ability to pay online immediately at the receipt of the invoice can get you paid faster!

*Lyza L. Sandgren, Paralegal (not an attorney), Georgia

It is exciting to send out an invoice for sure. I do not send a letter, just the invoice with a return envelope. I like to use brightly colored ones so the client doesn't lose it and I can see it easily in the mail each day. Even better, however, is to make arrangements for payment up front so you don't have to wait to be paid. Time will teach you what works best for you.

Eliz. C.A. Johnson, California

Great advice everyone - thanks. It's all definitely helpful and I appreciate your time!

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The silliest thing about cover letters is that generally they are ignored. Nothing is sillier than say enclosed please find my 400 page breif proving we win.

Seriously they just fished out the cover letter and now need to go back and root around for what you sent them.

I figure hey you're a smart guy If the document heading says Death Warrant it's not good news and you'll figure out what to do about.

Your invoices should be similarly self explanatory. If not you need a redesign ASAP. I think Jay Foonberg wrote a book on billing *I think.*

John Davidson, Pennsylvania

Wait.....

We need to send bills? Since when? Is THAT what I've been forgetting to do?

WHY DOESN'T ANYONE TELL ME THESE THINGS????

Greg Zbylut, California

LOL - now I have to clean some Textbook cabernet from my computer screen . . . !!

WDJiii

Walter D. James III

I also use MyCase. I usually include something in the notes section like thanks for your business or stick with your payment plan or I'll talk to you next week.... Something simple like that. I used to include a letter, but it started to take up too much time and I had to stop. I do sign my first name on each invoice though to give each one some personalization.

Letisha Luecking Orlet, Illinois

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Try to get your money in advance so you need not bill and request payment. This is no good. Get Foonberg's book. Old, Outdated, Invaluable for starting out.

Just bill to show transfer from trust to operating. I wait a week to actually cash the check.

I use mycase also but liked better that quickbooks allowed a canned note or statement such as "Thanks for your business." If mycase has this - I'd love to know.

Good Luck!

P. Jayson Thibodaux, Washington
