

SmartBooks Client Bill of Rights

Empowering Healthy Business™

Our Core Values

BE CURIOUS

We ask the right questions to understand your business so we can deliver a solution that helps you achieve your goals.

BE ACCOUNTABLE

You can count on us to deliver on our commitments and be a reliable extension of your team. We get things done!

DELIVER SCALABLE SOLUTIONS

We implement solutions that meet current needs and future needs, using a combination of people, technology, and process.

ENJOY THE RIDE

Our people are fulfilled and enjoy working with you. You didn't start your business to manage finances. Thankfully for you, we did!

What you should expect from us

- We understand your business and your goals.
- We give you information and support to run a healthy business, providing information in a way that is understandable to you.
- We clearly communicate when and what information is needed from you in order to deliver on our contractual commitments.
- We provide deadlines for our deliverables and we meet our commitments to you. If we are unable to meet our commitment, we notify you in advance.
- We approach solutions through a lens of what is repeatable and scalable.

What we need from you

- Be receptive and open to adopting the systems and proven processes that have been successful with other businesses. We can't guarantee our commitments without using our systems and processes.
- Clearly communicate your goals and expectations and be responsive to our requests for information.
- Be respectful of our time, as we are different from your full-time employees.
- Participate in Business and Financial review calls so we can stay abreast of your needs and put solutions in place to meet them.
- Share your feedback, good and bad.

Satisfaction Guarantee

If we fail to meet expectations, and you have met yours, let us know and you will receive a \$500 credit on your next invoice.