

The perfectionist



Perfectionists are process-driven people, who sometimes seem to be looking for reasons not to pay. Perhaps your invoice is missing the PO number. Perhaps it's in the wrong format. They're only small things, but they seem to make a big difference to this individual.



Getting the perfectionist to pay on time

It can feel like this customer is trying to catch you out. However, more often than not, there are good reasons that they're asking you to work in a certain way.

The best solution is to really get under the skin of their processes – to understand what they need and to minimise invoice errors. We've put together a few suggestions about how you can do this.

But it's not all about your invoices. It's also important to build a little rapport. We've got some tips for that too.

Before you accept the job

Being clear on your terms is especially important when you're working with a perfectionist. Ask them about their processes before you start work.

Do they have any feedback on how you submitted your invoice last time? Or is there a particular time of the month when they normally pay their suppliers? That will help you know when to chase them and when to leave it.



During the job

If you're being paid by the same person who requested your services or product, check that they're happy with what you're delivering throughout the project.

This demonstrates that you value their opinion and are responsive to their needs. The more you can build up good will at this stage, the more reluctant they will be to push back on your invoice when the project is over.

Just before you finish the job

Nudge, a book by Richard Thaler and Cass Sunstein, explores the idea that small and apparently insignificant things can have a big impact on people's decisions.

"By knowing how people think, we can make it easier for them to choose what is best for them, their families and society."¹

If we apply this theory to invoices being paid, it suggests that you should be in regular contact with your customers to 'nudge' them towards paying.

So just before you complete your work or deliver your product, remind your customer of your payment terms.

If you're dealing with a perfectionist, you might also want to play their processes back to them. Send them an email, mentioning how you will submit the invoice and what it will include so that they have the chance to flag any misunderstandings sooner rather than later.

1. Richard Thaler and Cass Sunstein, Nudge (Penguin, 2009)



When you send the invoice

Some accounting softwares will automate parts of the invoicing process, minimising the need for manual data input and the room for error. Another way to reduce mistakes is to create a checklist of the things you know your customer wants.

Once you've had one invoice accepted by the perfectionist, you can save the successful document as a template and edit it for your next job. Alternatively, look for accounting software that will let you replicate and edit invoices.

When you let your customer know that it's time to pay, it's a good idea to reference the recently completed work – perhaps commenting on how you feel the project went and offering to tie up any loose ends.

This reminds them of the value of the relationship and makes the communication feel like it isn't all about you and being paid.



When you send the invoice

If you're going to see your customer, take a copy of the invoice with a 'thank you' gift. This is usually a low-value item with your branding on it. The idea is that it's regularly seen by the customer and keeps your company on their mind.

Here are a few ideas of gifts that you could have branded: USB, notepad, portable phone chargers, fridge magnets, jam or marmalade.

If you're not going to see your customer face-to-face, you can email them and post the gift.

Avoid referencing the amount of money due in the subject line as it can trigger their spam filter to send your email to the Trash folder.

But do include the invoice number in the subject line. This makes it easy to search for and is the kind of detail perfectionists appreciate.



One week after invoicing

We recommend contacting your customer once a week after you've sent the invoice, so you can continue to 'nudge' them towards making a payment.

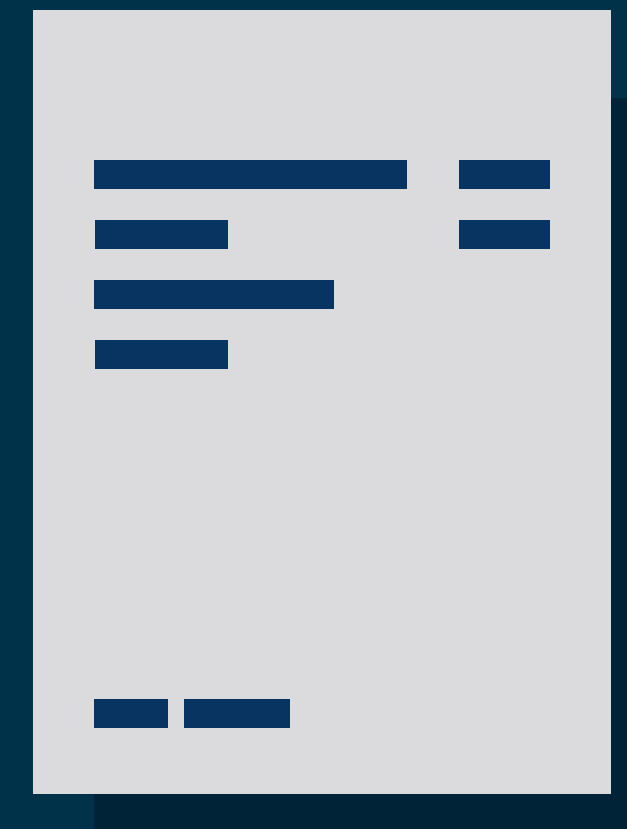
If you're dealing with a perfectionist, it might be best to say that you're "checking that everything is ok with the invoice", rather than making it sound like you're chasing them.

Two weeks after invoicing

Perfectionists can come across as very formal, but mimicking this tone in your responses will only make the situation worse. Go for a friendly writing style that's professional and clear, without sounding stiff or frustrated.

You can also keep things friendly by visiting them when you get the chance and inviting them to any industry events you're attending. After all, they might become a business advocate in the future.

If you can't understand what's wrong with the invoice you submitted, it might be that they have cash flow issues themselves and are stalling for time. Try gently asking if they'd like a payment plan.



Three weeks after invoicing

If you're struggling to get through to the individual you need to speak to, here are a few tricks to have up your sleeve:

Search for them on LinkedIn, add them as a connection and send them a message.

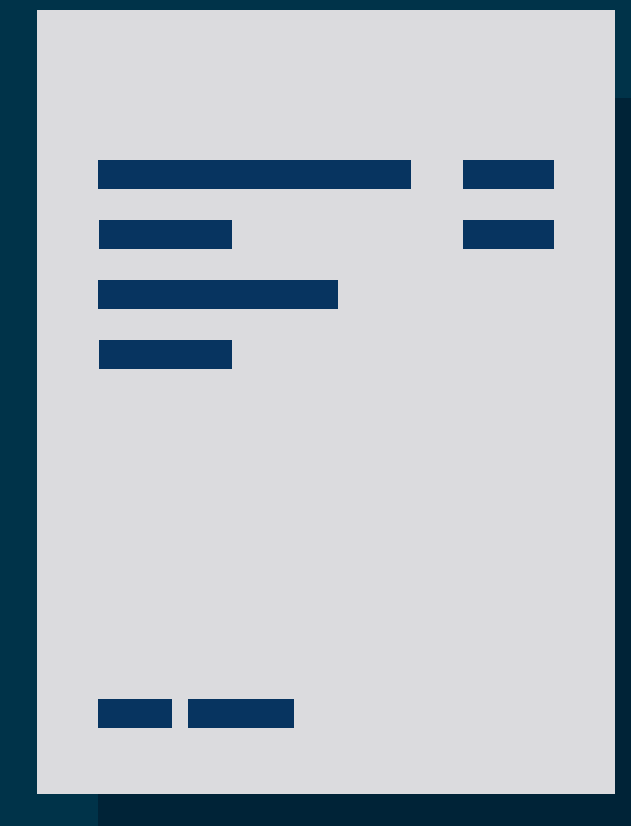
If you're contacting a small business, ask to speak to Accounts Receivable rather than Accounts Payable. They are highly likely to be looked after by the same person, but it makes you sound like you're trying to pay them, rather than asking for payment.

Four weeks after invoicing

Unless your payment terms state otherwise, customers have thirty days to pay you.

If they still haven't paid after this time, and you have made all of the edits to your invoice that they requested, you might want to consider some of these 'last resort' tactics.

Any one of them could be the 'nudge' your customer needs to make that payment. It's also important to state clearly that they are in breach of your payment terms.



Last resort tactic **one**

Add receipts to your emails so you can see if the recipient opened them. If you're using Outlook, simply go to File > Options > Mail. The option to add a delivery receipt is under Tracking.

Last resort tactic **two**

For smaller businesses, you may wish to be lenient. You could offer to split the invoice over two months to help with their cash flow. You could also remind them that they can pay in the way that suits them.

Last resort tactic **three**

For bigger businesses, try sending them an audit of all outstanding invoices.

Appeal to your customer's better nature. Explain that you're a small business and that having payments made on time is crucial.

Whilst this might feel like you're revealing too much, it is possible that someone who works for a larger organisation simply hasn't thought about the impact not paying will have on your cash flow.



After they've paid

No matter how late the payment is, send a thank you note to let your customer know that the payment has been received and that you appreciate it. Perfectionists will particularly appreciate this kind of clear communication.

Find out more

Powered by Stripe, our new invoice payments features make getting paid faster, clearer and simpler than ever before. It means no more late nights chasing invoices, and more time spent doing what you love.

[See the features](#)