

What I need from you

Payment Process Setup & Support

This list explains what I need for this service, why I need it and where you can usually find it. Send the information together where practical. Tell me straight away about anything unavailable or urgent. I will confirm when the essential information is complete and the delivery date is fixed.

Essential items are needed before the relevant work can proceed. Important items affect what I can conclude; optional items add useful context. If an item is missing, incomplete, unreadable or a different version from one already sent, identify it by its number and explain what you hold. I will tell you what replacement is needed, why it matters and any effect on the agreed work or date.

1. Every contract in use, with amendments ESSENTIAL

Why I need it. The process has to fit the contracts, not the other way round.

Where you'll find it. Whoever manages each contract, or the job's commercial folder. Send every contract you are paid under and every one you pay under.

Without it. The process gets designed without knowing what every contract actually requires, so it may not satisfy the one nobody sent.

2. An honest description of the current process IMPORTANT

Why I need it. What is happening now, as opposed to what is written down.

Where you'll find it. Written by whoever actually runs the cycle, not the person who wrote the procedure. A page or two is enough.

Without it. The map of what happens now rests on what people say in interview, with nothing written down to check it against.

3. The templates in use IMPORTANT

Why I need it. What the team already knows how to operate.

Where you'll find it. Whatever spreadsheet or document people actually use day to day, including anything kept on someone's own machine rather than the official version.

Without it. None of your existing paperwork is kept; the whole suite gets replaced rather than adapted from what people already know.

4. Who does what, by role IMPORTANT

Why I need it. A process with no owner per step is not a process.

Where you'll find it. A short list from whoever manages the team: who is involved by role, and who covers each role when that person is away.

Without it. A step nobody claims ownership of is mapped as having no owner at all, rather than being assigned to someone.

How to send it

Everything to contact@jackbutlerkettle.com. Original files rather than scans of printouts wherever you have them, and forwarded emails rather than text copied out of them, because the dates and the addressees travel with the original and they often turn out to matter.