SMART WEBSITE DESIGNERS
www.smartwebsitedesigners.co.uk

1:1 MENTORING · SESSION GUIDE

From Enquiry to Invoice

Join up quote, job, invoice and payment reminder, so nothing is typed twice and nobody forgets to chase.

DURATION	FORMAT	INVESTMENT	INCLUDES
90 minutes	1:1 on Zoom or in Swansea	£175	Written action plan

For example: An electrician sends quotes, invoices and payment reminders without retyping a customer's details.

Who this session is for

- You type the same customer details into several places
- Invoices go out late, or not at all
- You hate chasing people for money

By the end, you will

- Map how a job moves through your business, from first call to payment
- Cut out the steps that are typed twice
- Send invoices the day the job is done
- Chase late payments automatically and politely

What we will cover in 90 minutes

Every session is built around your business. Timings are a guide, and we always go at your pace.

0–10 mins	**Welcome and how a job flows now** From the first call to getting paid.
10–25 mins	**Mapping your customer journey** We draw the steps together and spot the time-wasters.
25–45 mins	**Choosing your tools** Job and invoicing tools that talk to each other.
45–65 mins	**Joining it up** Simple automations, with no code and no fuss.
65–80 mins	**Getting paid faster** Automatic invoices, polite reminders and card payments.
80–90 mins	**Your action plan and questions** Agree what you will try this week and ask anything you like.

What to bring

- A laptop or tablet
- A recent quote and invoice
- Logins for any invoicing or accounts software you use

What you will take away

- A simple map of your customer journey
- A list of the steps you can automate
- At least one automation set up or planned
- Your written action plan



YOUR MENTOR

Ian Brealey

Ian is a qualified tutor and Internal Quality Assurer (IQA) and a former Head of Training at Gower College Swansea. He has run Smart Website Designers for 10 years and uses AI and automation every day in his own business. He helps tradespeople, shop owners and service businesses save hours every week, and explains everything patiently, in plain English, at your pace.

How booking works

1

Book a free chat

A free 30-minute call to make sure the session is right for you.

2

Pick your date

Choose a time that suits you from Ian's live calendar.

3

Meet with Ian

On Zoom from anywhere, or in person in Swansea.

4

Get your plan

Receive your written action plan after the session.

Ready to book? smartwebsitedesigners.co.uk/business-mentoring

Questions first? Email ian@smartwebsitedesigners.co.uk or call 07305 319667

This is practical business mentoring. It is not financial, legal or tax advice; for those matters, please speak to a qualified adviser.