



Sample Controllership Agreement
between
(Business Name)
and
Kris Freeberg, Economist, of [Making End\\$ Meet](#)

Duties. Effective _____, Economist Kris Freeberg agrees to fulfill the following Controllership Duties for (Business Name).

1. Regular support keeping Cash Flow Projections up to date, that you might plan, agree on, and perform disbursements other than routine business expenses (buying assets, retiring debt, distributing profits, etc.) in a way that is predictable, calm, orderly, and constructive.
2. Revenue and Expense Planning.
3. [Marketing Plan](#), consisting of five elements:
 - A) Sales goal
 - B) Strategy (the underlying math for the sales goal – prices times quantities, across your product and service mix)
 - C) Target Market(s)
 - D) Channels, and
 - E) Tactics
4. Assistance executing the Marketing Plan, including as much hands-on help with your sales team as is necessary to get you on your desired sales trajectory.
5. CRM system assistance.
6. Accounting support, including but not limited to:
 - A) Understanding and working with your accounting in its current form;
 - B) Transitioning to a different, better accounting system at such a time as you choose;
 - C) Report design & interpretation;
 - D) Budget tracking, and
 - E) Bookkeeping staff training and supervision.
7. Management Information System support, refining and improving the “[How We Did App](#)” (“HWD”) according to your specifications, including, if you so desire, Gantt-style Project Management functionality, easier and more detailed staff time tracking, and expected-versus-actual comparison reporting.
8. Developing and supporting a systematic, rational, and fair incentive-based compensation plan for all personnel. My intention is to make it Contribution Margin (CM) based, configuring both the HWD App and your Accounting system to measure CM consistently and fairly. (We may want to consider using [Xactly](#) which appears to have set the standard in the Incentive Pay Space.)
9. API integrations between key applications using “Middleware” like [Workato](#) and [Zapier](#).
10. Assisting the pursuit (both internal development and external acquisitions) of new lines of business that may support your growth objectives.
11. Procedures documentation, as discussed in Sam Carpenter's book [Work the System](#) – the goal here being to decrease errors, simplify and expedite training, liberate your time for growth and business

development, and make (Business Name) more turn-key for both present and future partners.

12. Sales support, according to principles like those I've mentioned in books like [The Conversion Code](#), [the works of Jeff Fox](#), and [The One Thing](#), as well as your own preferences.
13. Growth support, relieving "bottle necks" and constraints as they arise, as discussed in Eli Goldratt's classic book, [The Goal](#).
14. [Lean](#) assistance and support.
15. [Investment research](#), [portfolio tracking](#), and [ROI optimization](#) assistance.
16. [Family Office](#) development.

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**Compensation.** Mr. Freeberg's compensation shall consist of:

- A Base, for growth preparation and administrative support, and
- A Share of Contribution Margin (CM) to encourage growth in sales and profits.

The Base shall be \$\_\_\_\_\_ annually, paid \_\_\_\_\_ (weekly or monthly) via auto bank transfer, beginning \_\_\_\_\_.

The CM Share shall be \_\_\_\_% after annualized sales have exceeded \$\_\_\_\_\_, paid \_\_\_\_\_ (monthly or quarterly).

This agreement is annually renewable, reviewable, and negotiable. Additionally, it depends on the continual mutual satisfaction of both parties and is renegotiable and revocable at will by either party at any time after reasonable notice.

**Agreed:**

***For (Business Name)***

***For Making End\$ Meet***

\_\_\_\_\_  
Owner Name                      Date

\_\_\_\_\_  
Kris Freeberg                      Date