



**Controllership Agreement
between
(Company)
and
Kris Freeberg, Economist, of [Making End\\$ Meet](#)**

Duties. Effective _____, Economist Kris Freeberg agrees to perform the following Controllership Duties for (Company):

1. Prepare and maintain a household [Lifetime Savings Plan](#).
2. 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. Techniques will be based in part on Greg Crabree's excellent work in his book [Simple Numbers, Straight Talk, Big Profits](#).
3. Revenue and Expense Planning ([budgeting](#)), including savings and taxes.
4. [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
5. 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.
6. CRM system assistance.
7. 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.
8. 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, Kanban style work flows, Whole Day Time Keeping, expected-versus-actual comparison reporting, and integrations with accounting, email, DocuSign, and similar popular tools & platforms.
9. 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.

10. KPI (Key Performance Indicator) definition and tracking based in part on Greg Crabtree's excellent work in his book [Simple Numbers, Straight Talk, Big Profits](#). In particular:
 - o Labor Efficiency
 - o Accounts Receivable DSO (Days Sales Outstanding)
 - o Core Capital (2 months expenses in cash reserves and no debt)
 - o Salary Cap
11. Assisting the pursuit (both internal development and external acquisitions) of new lines of business that may support your growth objectives.
12. 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.
13. Curation: email, files & folders on both computer & cloud, Internet browser content, data backup.
14. 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.
15. Growth support, relieving “bottle necks” and constraints as they arise, as discussed in Eli Goldratt's classic book, [The Goal](#).
16. [Lean](#) assistance and support.
17. [Investment research](#), [portfolio tracking](#), and [ROI optimization](#) assistance.
18. [Family Office](#) development.
19. Exit Strategies, and their execution, including facilitating [sale of your business](#) by making it as “turn-key” as possible.

~~~

**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).

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

**Agreed:**

\_\_\_\_\_ (Company) \_\_\_\_\_ Date

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