P-2 Who to send us

Backlog Controller runs the monthly close for construction contractors. The books close by the tenth business day of the following month, in the contractor's own system (QuickBooks, Sage or Foundation), with a WIP schedule tied to the balance sheet and, from the Close + Cash level, a 13-week cash forecast, so the surety, the bank and the year-end CPA work from the same file.

Who fits

Specialty trade contractors and small general contractors with $3 million to $20 million a year in revenue: mechanical, electrical, plumbing, concrete, steel, site work, commercial interiors, where jobs run long enough for percentage of completion to matter. Most are bonded or want to be, have a bank line with covenants to report on, and have books kept by a bookkeeper or a family member who does careful work but cannot produce a WIP schedule.

Send us a contractor when the surety asked for a WIP schedule and got a spreadsheet nobody could tie out, or when the year-end statements took until summer because the books needed rebuilding first.

Not a fit

- Under about $3 million in revenue, or work that is mostly short service calls. A good bookkeeper is the better answer.
- Anyone who wants us to do their taxes. That stays with their CPA, and the commitment in P-3 says so in writing.
- An owner who wants data entry only. The work is the monthly close and the numbers behind it, and a bookkeeper does data entry for less.

What happens when you refer someone

1. We call them within one business day.
2. A free diagnostic: two hours with read-only access to their books, and a one-page list of what we found. They keep it whether or not they hire us.
3. If it is a fit, a fixed monthly fee and a one-time onboarding fee, both set after the diagnostic, and the first close in 30 days when the books are current.
4. We tell you whether they signed on, with their permission.

No referral fees in either direction.

Backlog Controller
office@backlogcontroller.com
backlogcontroller.com