

Document It Before You Need It

A practical guide to protecting your business and your peace of mind, one written record at a time



PAY IT FORWARD
with
Bethany Bell

There's a rule I carry with me from the first part of my career:

If you didn't write it down, it didn't happen.

That's not a business slogan for me. It's something I learned working back of house in healthcare, where documentation isn't optional. When I started my own business, I brought that rule with me, and it's shaped almost everything about how I run things, from client agreements to personal to-do lists.

This guide isn't about becoming rigid or overly formal. It's about building a habit that protects you before you ever need protecting.

The lesson that made it real

Early in my business, I had an issue with a client where I didn't have certain things written into my agreement. I was new. I thought I had everything covered. I didn't.

That experience sent me back to basics: document things properly, every time.

Later, a different issue came up with another client. This time, I had it all. Not just the agreement, but the emails, the back and forth conversations, everything laid out clearly: what I could do, what I couldn't do, what we'd already discussed. Because of that, we were able to work it out. The documentation is what made the difference between the two outcomes.

That's the moment this habit stopped being theoretical for me and became something I trust completely.

Agreements that cover what happens when things go wrong

Most agreements focus on what you'll do when things go right. Fewer cover what happens when they don't.

I try to look at agreements from every angle, both the client's side and mine. What happens if a client doesn't hold up their end? What happens if something changes on my side? Building that into the agreement upfront means you're not scrambling to figure it out in the moment, when things are already tense.

Write down how you do things, even if it's rough

SOPs are another piece of this. Maybe not the first or second time you do something, but no later than the third time, start writing it down.

It doesn't have to be perfect or fancy. It just has to be something you can follow consistently. And it's not a one-time task. Every time you come back to a process, you fix it, modify it, update it. To this day, there are things I do regularly, but not every day or every week, and I'll still go back and check myself against what I've written just to make sure I haven't missed anything.

Every phone call deserves a follow-up email

If I have a phone call with a client instead of handling something over email, I always follow it up with a short email. It keeps us both on the same page, and it means there's a written record if I need to reference the conversation later.

Clients appreciate it too. It shows you're organized and that you take the relationship seriously. And practically speaking, it's timestamped, so it's another form of documentation you already have without extra effort.

Document before you need it

This is the piece I'd underline for anyone starting something new. If you're about to offer a new service or start something you haven't done before, write down what you think you'll need to know before you're in the middle of it.

Your head is clearer now than it will be later, when you're actually in it. Having that written down means you can go back to it and remember what you were thinking when things were less chaotic.

It's not just a business habit

This carries into my personal life too. When I'm too jumbled up in my head to figure something out, I write it down. It doesn't have to make sense right away. Getting it out of my head and onto paper is what makes it clearer.

I use a digital list for things I need to do, because I always have access to it and it automatically carries incomplete tasks over to the next day. But I still write things down by hand as well. There's real evidence behind this: the act of physically writing something down helps it stick in your head better. So for anything I really want to remember or follow through on, I do both, digital for access, pen and paper for it to actually stick.

Pitfalls to avoid

(General guidance, not specific to any one experience)

Waiting until something goes wrong to start documenting, instead of building the habit early

Treating SOPs as one-and-done instead of something you revisit and update

Skipping the follow-up email because a call "felt clear enough" at the time

Relying only on digital tools when a habit isn't sticking, without trying a different format

Assuming documentation only matters for client-facing situations, when it applies just as much internally and personally

How to apply this in the next 7 days

Exercise

- DAY 1** Pick one client agreement and check whether it addresses what happens if something goes wrong, for both sides.
- DAY 2** Choose one process you repeat often and write down the steps, even roughly.
- DAY 3** Review that write-up. Fix or clarify anything that's unclear.
- DAY 4** After your next client call, send a short follow-up email confirming what was discussed.
- DAY 5** If you're considering a new service or offering, write down what you think you'll need to know before you start.
- DAY 6** Try writing one task or goal down by hand instead of only adding it to an app.
- DAY 7** Look back at everything you wrote this week. Notice what already feels more secure.

You don't need a perfect system. You just need to start writing things down before you need them, and keep coming back to update what you've written.

Summary - At a glance

- *If you didn't write it down, it didn't happen*
- *Agreements should cover what happens when things go wrong, from every angle*
- *Start writing down your SOPs no later than the third time you do something*
- *Follow up every client call with a short email*
- *Document new services or offerings before you're in the middle of them*
- *Writing by hand helps things stick, even if you also keep a digital system*