



PROFITABLE TRADIE.



PROFITABLE TEAM WORKBOOK

Contents Page

HOW TO ATTEND A ONE DAY INTENSIVE.....	4
TIMELINE FOR THE DAY.....	5
MODULE 1. HOW TO OPERATE WHEN TRADESMEN ARE AS SCARCE AS HEN'S TEETH.....	7
DEFAULT DIARY.....	13
TRADIES LADDER.....	15
KNOW YOUR NUMBERS.....	16
HOW MUCH SALES CAN A TRADESMAN GENERATE (EXERCISE).....	17
PRODUCTIVITY HACKS (EXERCISE).....	18
MODULE 2. CLIENT OF THE QUARTER	21
INTERVIEWS WITH THE 3 TOP CLIENTS FROM THE PAST 90 DAYS	
MODULE 3. HOW TO HIRE THE RIGHT PEOPLE	25
YOUR UNIQUE HIRING PROPOSITION (EXERCISE).....	31
STAFF HIRING PROCESS.....	33
JOB SPECIFICATIONS.....	34
TRADEME JOB ADS.....	40
NEWSPAPER AD.....	42
FACEBOOK AD.....	43
REFERRAL EMAIL.....	44
PHONE INTERVIEW TEMPLATE.....	45
FACE TO FACE INTERVIEW TEMPLATE.....	47
PRE-EMPLOYMENT CHECKS.....	49
REFERENCE CHECKING TEMPLATE.....	50
MODULE 4. CREATE A HIGH PERFORMING TEAM.....	53
QUALITY ASSURANCE CHECKLISTS.....	56
CORE VALUES (EXERCISE).....	58
RULES OF THE GAME.....	59
TOP 5 RULES OF THE GAME (EXERCISE).....	60
MEETING FORMAT.....	61
CLIENT SURVEY.....	62
PERFORMANCE REVIEW.....	63
TEAM INCENTIVE PROGRAM.....	66
MODULE 5. LEADING FROM THE FRONT	71
CAUSES OF POOR PERFORMANCE (EXERCISE).....	76
MODULE 6. GUEST SPEAKER – RICHARD PETRIE	77
MODULE 7. BUILDING YOUR PLAN	81
TOOLBOX CHECKLISTS.....	82
TOP 10 PROJECTS FOR NEXT 90 DAYS (EXERCISE).....	85
90 DAY PLAN (HOMEWORK EXERCISE).....	86
HIGHLY RECOMMENDED READING LIST	90

How To Attend a One-Day Intensive

The average (growing) Plumber or Electrician spends \$958 a year on some form of self-improvement. Seminars, books, CD's, DVD's, Software systems or courses to make themselves better people and better business people, in short: to make more money.

Seminars and courses are the best opportunities because they're live performances. They offer "in your face" information that is timely—which makes you evaluate the information in terms of what you are doing "right now".

Business people go to live seminars eager to get more information, but few know how to attend for maximum benefit. Here are few guidelines and ideas I've compiled from both seminar leaders and seminar attendees - These tips will ensure you walk away with the gold:

1. **Lower your sensitivity meter - or better yet, turn it off.** You're here to get information not be offended by a remark or word.
2. **Self-evaluate it, don't "I know it".** When you hear a fact that will make you better, don't tell yourself "I know that" rather ask yourself, "how good am I at that?" Self-evaluation is the only way to get better.
3. **Search for idea-gold.** Look for what you don't know - not what you do know. Try to walk away with 6 things you can use tomorrow.
4. **Listen with the intent to understand.** Don't cut off the thought too soon. Stick with it...listen all the way out. Don't be smarter than the presenter - just listen with the intent to learn and get better.
5. **Don't do it like they do it. Do it like you do it.** Adapt the seminar leader's concepts and words to your personality and style.
6. **Ask anything any time.** Challenge anything any time. If you don't understand, ask why. Write down questions as they occur to you and ask them at the first appropriate moment.
7. **All information won't work all of the time.** So what? Pick out what WILL work and concentrate on that.
8. **Take the general information and adapt it to your situation.** Think, "how will this work in my business?" Try to adapt the principle as soon as you hear it.
9. **Don't criticise the presenter - instead listen for the one or two gems that may impact you forever.**
10. **Your objective is to make yourself better.** That's why you came in the first place. Don't strut what you already know. Find the "BFOs (Blinding Flashes of the Obvious)" and convert them to your world. Leave with new things that will help you, not the same information you came with.
11. **Sit with someone you don't know -Stay away from the people you came with. Make new friends. Look for a potential new customer or contact.**
12. **Take great notes and record them at the end of the event.** Too many times great ideas go fallow before they have a chance to be implemented. All great seminar ideas fall victim to the every day work that awaits you after the event. If you record your notes and listen to them every day for two weeks, you are more likely to do the things you would have put off for a month, maybe forever.

Today's Timeline

**Million Dollar Tradie –Team Intensive
Friday 2nd September 2016**

9:00am

Introduction

9:30am

How To Operate When Tradesmen Are As Scarce As Hen's Teeth

10:30am

Morning Tea

10:50am

Client of the Quarter

11:20am

How To Hire The Right People

12:20pm

Lunch

1:10pm

Create A High Performing Team

2:00pm

Leading From The Front

3:00pm

Afternoon Tea

3:30pm

Guest Speaker –Richard Petrie

4:30pm

Building Your Plan

5.00pm

Finish – Snacks & Drinks

PROFITABLE TRADIE.

Specialist Business Training for Plumbers and Electricians

Module 1

How To Operate When Tradesmen Are As Scarce As Hen's Teeth



Team Boot Camp

Notes

**Million Dollar
Plumber Ladder**



Leverage



Build a Strong Margin



Improve Retention



Maximise Productivity



Notes

**Lengthen Working
Hours**



**Match Work With
Skill**



Action Steps

Backburners

Default Diary Example

Scheduled in "wife / Family" time
 Proactive Marketing Activity

Quadrant 2 activities would be better earlier in the week and earlier in the day

Default diary	Monday	Tuesday	Wednesday	Thursday	Friday	Task
7.00am						
8.00am	Team Meeting	Administration	In Office Pricing	Administration	Administration	Team Management
9.00am	Administration	On Site Quoting		On Site Customer Meetings	Health and Safety	Administration
10.00am	In Office Pricing				Gas Compliance	In Office Pricing
						On Site Quoting
						On Site Customer Meetings
						Health and Safety
						Gas Compliance
						Business Development
						Gym
						Total
1.00pm	Lunch	Lunch	Lunch with Nadine	Lunch	Business Development	44 hrs
2.00pm	In Office Pricing	In Office Pricing	In Office Pricing	On Site Quoting		44 hrs
3.00pm						6 hr
4.00pm						4 hr
5.00pm						0 hr

could be more specific

Group site visits/ quoting together to reduce travel logistics & breaking up day

Default Diary Template

PROFITABLE
TRADIE.

Default Diary Template

	Mon	Tue	Wed	Thu	Fri	Sat	Sun
6.00am							
7.00							
8.00							
9.00							
10.00							
11.00							
12.00pm							
1.00							
2.00							
3.00							
4.00							
5.00							
6.00							

THE MILLION DOLLAR TRADIE LADDER

SYMPTOMS

Freedom Time & Money. Exploring Other Ventures

Released....Almost. Struggling to Train the Team & System

Profitable but Burnout. Business Dependant on Owner. Lacking a Management Team

Steady but Stuck. Need Systems Both Onsite & in Office. Unreliable Sales & Marketing

Stressed & Keen to Grow. Managing Cash Flow. Staff Headaches

Excited but Overwhelmed. Needing a Plan

CRITICAL SUCCESS FACTORS

Employ a General Manager & Board of Directors. Grow Wealth Through Other Business Activities. Exit Strategies...

Provide Guidance to Management Team. Build Key Client Relationships.

Develop Management Team & System to Achieve Leverage.

Create Onsite Systems to Free up Time & Improve Quality of Work. Know your Numbers

Get More Work. Hire Staff. On The Tools

Manage Jobs & Own Projects



PROFITABLE TRADIE.

Know Your Numbers

Extra Tradesmen (Sales) \$ _____

Gross Profit Margin _____ %

= Gross Profit (sales x gross profit margin) \$ _____

Office Manager

Break Even = $\frac{\text{Fixed Cost}}{\text{Gross Profit Margin}}$

\$ _____ (Office Manager Salary)
% Gross Profit Margin

Sales Required to Break Even

= \$ _____

How Much Sales Can a Tradesmen Generate

A series of horizontal dashed lines for writing.

Exercise

Productivity Hacks

A series of horizontal dashed lines for writing notes.

Exercise

PROFITABLE TRADIE.

Specialist Business Training for Plumbers and Electricians

Module 2 Client Of The Quarter



CLIENT
— OF THE —
QUARTER

Team Boot Camp

PROFITABLE TRADIE.

Specialist Business Training for Plumbers and Electricians

Module 3

How To Hire The Right People



Team Boot Camp

Market Your Job



Phone Interviews



**Face to Face
Interviews**



**Pre Employment
Checks**



Notes

A series of horizontal dashed lines for taking notes.

Personality Test (DISC)



Reference Checking



Job Test



Notes

Action Steps

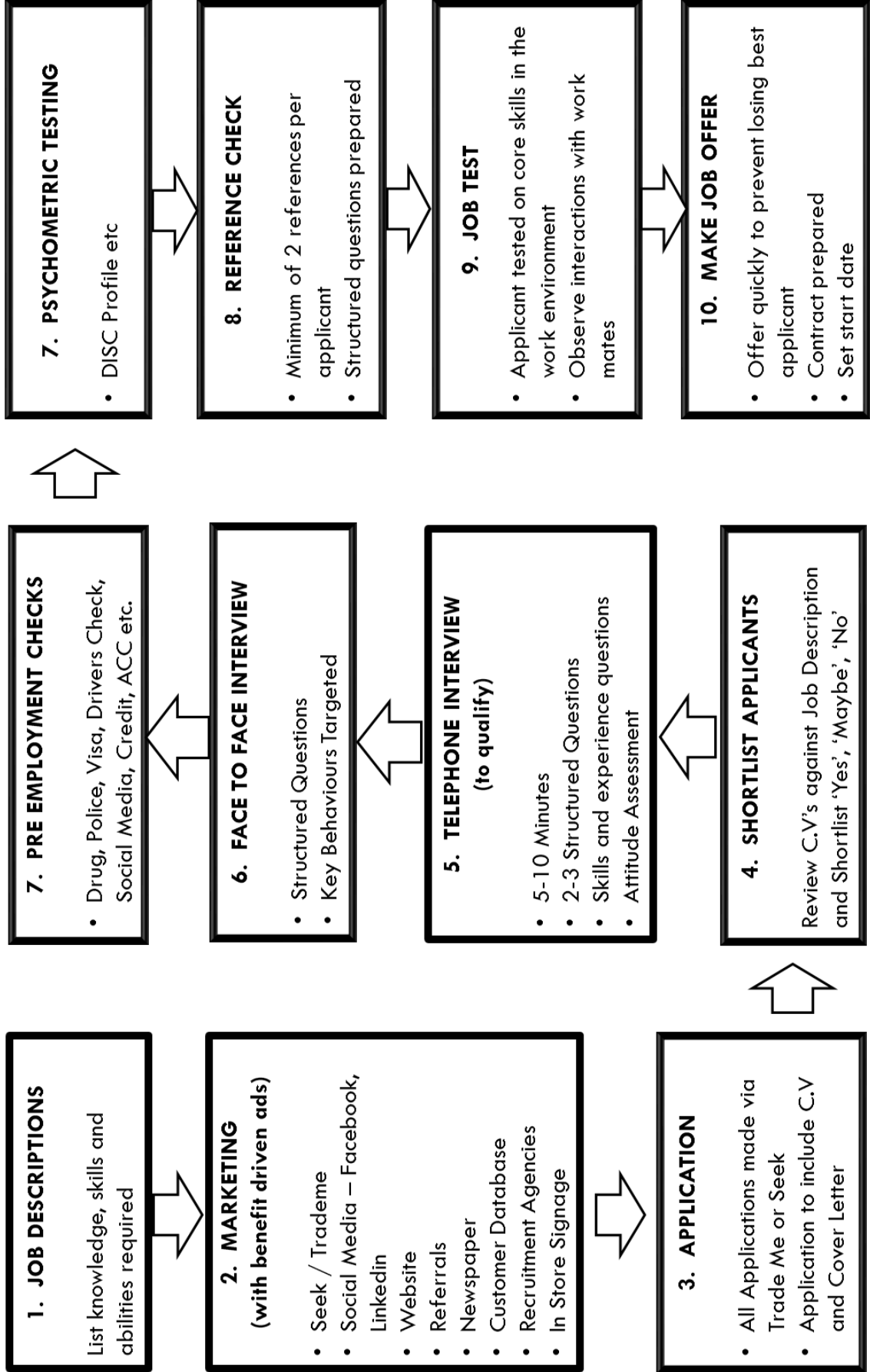
Backburners

Your Unique Hiring Proposition

A series of horizontal dashed lines for writing.

Exercise

Staff Hiring Process



Job Specification

XYZ Plumbing - Job Description – Plumber/Gas Fitter

Overview: -

We are excited about providing the highest quality service in all our plumbing, drainlaying, gas and solar projects from maintenance work through to construction.

We aim to employ only highly motivated team members where the overall quality and pride in our work are the key factors to providing this service.

Position Overview: -

- Position Status: Plumber/Gas Fitter
- Reporting Relationships: Director/Owners - Frank and Debra Thomas, Supervising Project Manager – Jared Stevens, Project Manager – Dylan Haywood.
- Liaise with: Office staff and other team members and clients.
- Expected hours of work: 7.30 - 5pm. However, the nature of this position may often require time outside of standard hours, these being paid at normal rate.
- Expected Contract Rate: Negotiable, dependent upon demonstrated ability and previous experience.

Role: -

To be able to undertake any Plumbing and/or Gas work assigned by the Director and/or Project Manager in a positive efficient and productive manner with pride, excellent workmanship and quality.

Responsibilities: -

1. Turn up to work at the correct time.
2. Be well presented in regard to clothing and personal grooming at all times and wear the allocated XYZ attire as directed.
3. Be polite, courteous and friendly at all times and refrain from bad language and excessive noise from such things as vehicles and radios.
4. Observe instructions/direction for job allocations and requirements, be clear on the specific details and carry out duties in a professional tradesman like manner. Strive towards producing the highest quality work.
5. Communicate clearly with all customers in terms of job commencement, work-in-progress matters and job completion at all times. Also communicate clearly with colleagues and management on all relevant matters.

Job Specification

1. Carry out all work as instructed by the Project Manager in the expected time frame.
2. Have your own basic kit of tools and work towards acquiring more tools as appropriate.
3. Ensure that your tools and those belonging to XYZ Plumbing are kept maintained in good working order so you can produce quality work. Including all Machinery.
4. Keep your van clean and tidy, check oil and water weekly and replenish if needed.
5. Let office staff know when your van has had a WOF (for the new due date).
6. If any tools or equipment are broken notify your Manager immediately so it can be fixed promptly.
7. Make sure that your site is safe at all times, (according to OSH regulations and XYZ Plumbing Health and Safety Policies).
8. It is expected that you will abide by the 'House Rules' and the 'Rules of the Game' of XYZ Plumbing.
9. Have fun, enjoy and be proud of what you achieve in your working day.
10. If needing to return to a job at another time, liaise with client and your Manager.
11. Upon completion of all jobs leave the site/property in a very clean and tidy manner.
12. Communication is paramount, do not hesitate to report any concerns immediately.
13. If you need time off, then you must give 2 weeks' notice minimum to your Manager.
14. If you are sick, contact your Manager before 7.00am.
15. You are encouraged to participate in team meetings and contribute to the overall team spirit. Your input, ideas and openness is encouraged and valued.
16. Be willing to share expertise with other staff members, especially apprentices.
17. Ensure quality control measures are carried out on jobs that are your responsibility.

Key Performance Indicators: -

1. Complete all time on jobs in Fergus, with the correct job number and accurately taking account of materials that need to be ordered.
2. All credits are accounted for and photo of packing slip is entered into 'Merchant Documents' under the correct job number.
3. Be punctual at all times when arriving at work and on client jobs. You will provide a high level of customer service at all times.
4. Client satisfaction will be assessed through feedback from clients.
5. Time on Fergus to match the GPS readings.
6. All and any accidents reported to your manager immediately.
7. All broken/damaged equipment is reported immediately to your manager. (There is a whiteboard in the workshop also to make a record of these.)

Job Specification

1. Clear all rubbish from jobs and dispose of correctly. Cardboard flattened into the cardboard bin and recycling done where possible at all times.
2. All work carried out in the expected timeframe as per the 'Notes' in the job on Fergus.
3. When doing underfloor ensure all hear is put away and not left in the workshop van or trailer.
4. Inform office if needing to return to a job so it can be rescheduled.
5. Keep work vehicle clean and in working order.

Future Possibilities and Career Development

Personal Development and Training: -

Up skilling courses as required i.e. Health and safety and trade related courses. Contact Jared for guidance and discussion in these areas.

Career Development: -

The aim for XYZ Plumbing will be to help you develop in any necessary areas to allow you the ultimate job satisfaction.

Personal Attributes and Qualifications: -

Essential

- Extremely ambitious with the drive and commitment to succeed.
- Passionate and committed to contributing to excellence in the business.
- Highly motivated and focused.
- Is able to delight customers by exceeding expectations.
- Attention to detail.
- Naturally shows initiative and is solution focused.
- Well-presented and articulate.
- New Zealand Licensed Plumber (With the Plumbers, Gasfitters and Drainlayers Board of NZ)
- Experienced with both residential maintenance and residential drainage.
- No criminal convictions.
- Current Drivers Licence.
- A team player.
- Be able to follow systems and processes to ensure the highest quality of work on time.

Job Specification

XYZ Plumbing - Job Description - Office Assistant

Overview: -

We are excited about providing the highest quality service in all our plumbing and drainlaying, solar and gas fitting projects from maintenance work through to construction.

We aim to employ only the most highly motivated team members where the overall quality and pride in our work are the key factors to providing this service.

Position Overview: -

- Position Status: Office Assistant.
- Reporting Relationships: Director/Owners - Frank and Debra Thomas, Office Manager - Maree Greely, Supervising Project Manager - Jared Stevens
- Liaise with: Office staff and other team members and clients.
- Expected hours of work: 8.30 - 5pm. A lunch break will be taken at 12.30 or 1.00pm for thirty minutes.
- Expected Contract Rate: Negotiable, dependent upon demonstrated ability and previous experience.

Role: -

To assist the Director/Owners, Office Manager in ensuring allocated office activities are completed in a timely, accurate and professional manner.

Responsibilities: -

1. Turn up to work at the correct time taking lunch breaks, (as above), to be staggered with Office Manager to ensure phones continue to be answered.
2. Be well presented in regard to clothing and personal grooming at all times.
3. Be polite, courteous and friendly at all times.
4. Carry out all work as instructed by the Office Manager, Director/Owners and/or Project Manager in the expected time frame.
5. Make sure that your site is safe at all times, (according to OSH regulations).
6. It is expected that you will abide by the 'House Rules' and the 'Rules of the Game' of XYZ Plumbing.
7. Have fun, enjoy and be proud of what you achieve in your working day.
8. If you need time off, then you must give 2 weeks' notice minimum to your Manager. (Acceptance of leave is at the discretion of the Director)

Job Specification

1. If you are sick, contact your Director before 7.30am.
2. You are encouraged to participate in team meetings and contribute to the overall team spirit. Your input, ideas and openness is encouraged and valued.
3. Be willing to share expertise with other staff members.
4. Answer the phone, if away from the phone, let the Office Manager know.
5. Working as part of a team, scheduling jobs for the maintenance tradespeople.
6. Assist with marketing activities (e.g. Mailing letters, customer database etc.)
7. Filing.
8. Processing the mail, (as per Receiving and Opening Mail Procedure), and banking of cheques.
9. Attend to email and website enquires as directed.
10. Management of credits back to suppliers.
11. Documentation of procedures under your jurisdiction.
12. Processing and management of Supplier Invoices, including importing.
13. Dealing with emails from Classic Builders re SSR's.
14. Invoicing of Classic Builders jobs.
15. Invoicing of 'other quoted jobs', e.g. Ultimate Homes.
16. Management of Asbuilts, scanning. Preparation of Drainage paperwork and duplication of job.
17. Fridays – Preparation of paper work for jobs the following week.
18. Creation of new jobs in Fergus.
19. Creation and management of purchase orders.
20. Management of Vehicle Database.

Key Performance Indicators: -

1. Purchase orders created daily.
2. Communicating effectively (in both articulation and listening), with the Office Manager, Managing Director/Owners and Project Manager to highlight any potential problems or concerns with staff, workload, quality or client relations.
3. Be punctual on arrival to and from work. You will provide a high level of Customer Service at all times.
4. The ability to demonstrate a willingness to share expertise.
5. Tasks completed in timely and accurate manner.
6. Job folders up to date, both physical and electronic.
7. All relevant invoicing is up to date.

Job Specification

Personal Attributes and Qualifications: -

- Extremely ambitious with the drive and commitment to succeed.
- Passionate and committed to contributing to excellence in the business.
- Highly motivated and focused.
- Is able to delight customers by exceeding expectations.
- Attention to detail.
- Naturally shows initiative and is solution focused.
- Well-presented and articulate.
- No criminal convictions.
- A team player.
- Be able to follow systems and processes to ensure the highest quality of work on time.
- Experience using XERO and Fergus (or similar accounting and trade management software).
- Willingness to share expertise and help others.
- High standard of communication skills, including and not limited to listening skills.
- Able to deal with change in an open minded and enthusiastic manner.
- Strictly limits time on personal phone calls and/or texts. No personal Social Media during working hours.
- Adheres to JT Plumbing Policies and Procedures and contributes to the creation and maintenance of them.

TradeMe

Title: Top Plumber...Huge Opportunity...Nail 2016!

Sub Title: Earn \$31-\$40 per hour(+)Earn OT if you want(+) \$1000 tool money(+)Paid birthday off(+)Relocation Allowance(+) \$2000 Sign On Bonus (+)more fun and laughs!

Do you want a job where you earn top dollar and love coming to work?

Do you want a great place to work where you have scope to learn, work with positive clients and interesting projects and have fun in the process?

Are you a qualified Plumber looking for a challenging role and a fresh start with a growing Plumbing Company?

Then this role could be perfect for you...if you've got what it takes!

XYZ Plumbing are on the hunt for an A+ Plumber who is motivated and wanting to get ahead.

We're (put the region) #1 Plumbing Company and our business is booming. We've got so many projects on the go that we need another pair of hands! Both our builders and maintenance clients are flat tack! And we have big plans to make 2016 a great year!

Now, if you're not looking right now yourself but you have a mate who is we offer a \$2,000 referral fee when we hire the person you refer. The only condition is that they work with us for at least 3 months...we don't want any muppets!

Here's why working with us will be the best career move you ever make:

- Earn \$31 -\$40 per hour – we pay top rates (depending on what you bring to the table).
- A \$2,000 sign-on bonus – to reward you because you'll be a top class tradesmen (...if just want to make a quick buck then we're not the place for you)
- You get a company vehicle and the latest iPhone 6
- Get up to a \$1,000 tool allowance
- If you're relocating we'll help with any moving costs up to \$1,000
- Overalls, wet weather gear and boots provided –we've just got flash new uniforms too! A paid day off for your birthday
- Beers, barbeques and lots of fun social events. We take an annual trip to Rarotonga!
- A boss who looks after you –John is well known for being a 'good bugger'

TradeMe

Here's what we need from you:

- # Gas fitting experience would be an advantage but not essential.
- # Be a New Zealand Qualified and Registered Plumber.
- # Hold a current Practising License.
- # Have a clean full NZ Drivers license.
- # Be able to work un-supervised, run your own jobs and train apprentices.
- # Honest and trustworthy.
- # Experience with both residential construction and maintenance work would help.
- # Take pride in your work and go the extra mile to make sure the job is top notch.
- # Great people skills both with fellow workmates and customers.

Check out the cool stuff we do at www.xyzplumbing.co.nz

If you think you've got what it takes then apply now via email with a copy of your CV and brief covering letter telling us why you are the right person for the job. Please include a photo and email it through to xyzplumbing@xtra.co.nz

Only people with the right to work in this country may apply for this position.

Applications close on(give 2 week deadline)

Newspaper Ad

TOP PLUMBER, TOP RATE FOR A TOP TEAM



EARN UP TO AN EXTRA \$3000 on top of your base salary through our great performance bonus system where you get rewarded for the results you deliver plus eight other reasons you must apply today!

1. Company vehicle.
2. Tool allowance of \$1000 each year.
3. Enjoy a stress and hassle free work place because our customers are all fantastic and appreciate our attention to detail and our desire to go the extra mile.
4. Your exposure to a "wide variety" of interesting and challenging work will develop your skills and experience. Not to mention your future earning potential.
5. Enjoy a supportive working environment where we value the contribution of our people and are committed to seeing you develop to your full potential. At Waipa Plumbing & Gas you will be treated as a real person.
6. \$500 relocation allowance.
7. Work safety boots supplied.
8. YOUR BIRTHDAY PAID DAY OFF ... that's right, we pay you to have your birthday off to enjoy doing the things you want to do.

Waipa Plumbing & Gas is a dynamic growing company based in Te Awamutu. We have more work than the team can handle so we have decided it is time to get some help - but we only want the best help! Are you good enough?

This is what you must be able to do to quality to work at Waipa Plumbing & Gas.

- Be a New Zealand qualified and registered plumber.
- Hold a current practising license.
- Have a clean driver's license.
- Be able to work unsupervised and use your initiative to solve problems as they arise.
- Honest and trustworthy.
- Have a wide range of experience.
- Have the internal desire to complete jobs to a high standard.
- Great people skills both with fellow work mates and customers.

So, if you think you have what it takes to join Waipa Plumbing & Gas then we **WOULD LOVE TO HEAR FROM YOU!** We are recruiting for a full time position (but we will consider part time if you have the right stuff).

Apply now via email with a copy of your CV and a brief covering letter telling us about yourself to: tania@waipaplumbingandgas.co.nz or phone Neal on 021 224 9300

Applications close 30 October 2015.

Only people with the right to work in this country may apply for this position.

Facebook Ad



2E Electrical Ltd

Sponsored · 🌐

👍 Like Page

Are you a qualified Electrician looking for a challenging role and a fresh start with a growing Electrical Company? 2E Electrical are hiring now!



Want To Earn Top Dollar & Love Coming To Work?

Earn at least \$3000 more than the industry average + paid birthday off + wide variety of work + \$1000 tool allowance + relocation allowance + more fun & laughs!

WWW.2EELECTRICAL.CO.NZ

Learn More

👍 Like

💬 Comment

➦ Share

Referral Email

Hi (NAME) (or Mate if you have not created name fields)

John (Your name) here from XYZ Plumbing (Your company name) in Wellington (your town) here.

We're looking to hire a new plumber / drain layer (insert title). If you know anyone who is looking for a change please let them know about the position. [I've attached a link to our Trade Me add here.](#) It'd be great if you could point them in our direction.

We're offering a referral fee of \$2000 for any one we hire.

Cheers

(Your name)

Phone Interview Template

Phone Interview Template

Name of Applicant:

Phone Number:

<p>Hi, (assess their energy and attitude on the phone) Rating: ____/5</p> <ul style="list-style-type: none"> • Hi, it's John Smith from XYZ Plumbing & Gas. I'm calling about the Plumbers Position that you applied for. • How are you today? • Do you have a few minutes to chat? Fantastic... • I have a couple of questions for you today 	
<p>5 Keys Traits for Successful Tradesmen (screening interview)</p>	
<p>Motivation for Applying? “Tell me what made you apply for this particular position?” Have they been applying willy-nilly? Are they desperate? What is the reason for change?</p>	<p>Rating: ____/5</p>
<p>Job Experience... “I see you have had several interesting positions (or you’ve been at your current job for a while). What type of work have you done?” e.g. maintenance, construction, commercial work etc. If you are looking for specific experience or skills ask what experience they have in that area. e.g. “what experience do you have in large commercial construction projects?” Remember you are looking to qualify out the time wasters.</p>	<p>Rating: ____/5</p>
<p>Personality ... “So what do you like to do for fun?” Are they “boring” or involved in other things that indicates achievement and motivation. (Do they have other interests? Fitness? Family?)</p>	<p>Rating: ____/5</p>
<p>Eagerness to learn, enthusiasm, motivation to get better, strength of ego and self-belief – Why do you want this job? Look at actions, not words</p>	<p>Rating: ____/5</p>

Phone Interview Template

Covering the Basics...

“This recruitment process is about find the right person for the role and we’re looking to give the successful for applicant more responsibility in the future.

- What is your situation in terms of availability and start dates?
- Are you a licensed / certifying plumber / gas fitter / drain layer?
- What are your salary expectations?
- Do you drive; have a car and a full license?”

Great, thanks for your time today. After doing these telephone interviews we will run interviews and job test with the successful applicants. We’ll advise you about that in the next couple of days.

Do you have any questions?

Great to chat and I look forward to talking with you again soon.

Face to Face Interview Template

Face to Face Interview Template

This interview should take between 45 and 60 minutes depending on the applicant. You may choose not to use all the questions.

1. **Welcome the applicant by introducing yourself and engaging in small talk for a couple of minutes (e.g. the weather, the rugby, family, news events etc.). Remember that you'll expect them to do similar with your clients when meeting for the first time.** *Intent: Evaluate ability to put people at ease quickly*

2. **Tell me a bit about yourself.** *Intent: Evaluate ability to communicate clearly, humour, interesting person, can they hold a conversation?).*

3. **What made you apply for the position?** *Intent: Evaluate whether the person is desperate for a job because they are not particularly employable or whether they see the role as real opportunity and have a genuine reason for moving jobs.*

Face to Face Interview Template

- 1. Tell me about a time you knew you were right... but you still had to follow directions or guidelines. Follow up questions would be...How would you do things differently next time?** *Intent: Evaluate ability to follow instructions and processes... and possibly to lead.*
 - **Red flag:** Found a way to circumvent guidelines "... because I know I was right," or followed the rules but allowed their performance to suffer. (Believe it or not, if you ask enough questions, some people will tell you they were angry or felt stifled and didn't work hard as a result, especially when they think you empathize with their "plight")
 - **Good:** Did what needed to be done, especially on a time-critical project, then found an appropriate time and place to raise issues and work to improve the status quo.
 - **Great:** Not only did what needed to be done, but stayed motivated and helped motivate others as well. With the team, an employee who is able to say, "Hey, I'm not sure this makes sense either, but for now let's just do our best and get it done..." is priceless. In a foreman / Ops Manager setting, good leaders are able to debate and argue behind closed doors and then fully support a decision in public even if they privately disagree with that decision.

- 2. Tell me about a situation when you've faced a disappointment or challenge and how you dealt with it? It could be a work situation or a more personal situation. Follow up questions would be... What did you do? How did you turn things around? What did you learn? What would you do differently next time?** *Intent: Evaluate ability to be persistent and to keep going when frustrated, disappointed or challenged.*
 - **Red flag:** Didn't learn anything and gave up. E.g. I had to quit work and couldn't handle it anymore.
 - **Good:** Did what needed to be done, kept plodding on despite the challenge.
 - **Great:** Not only did what needed to be done, but explained what they learnt about themselves and how they would do things differently next time.

Pre Employment Checks



You would insist on a pre-purchase inspection before you bought a house or a car, but what about your new employee?

Taking on the wrong person could cost you as much as a new roof or a reconditioned engine. The standard checks that should be done include:

Linked-in	Does the work history and other information on their Linked-in page match with what is on their CV?	Drug test	The Health and safety of your employees and those around them is paramount. Early identification of a potential drug user helps to ensure this.
Facebook	Are the image, culture and values that they talk about at the interview, the same as what the rest of the world is seeing?	Credit check	A poor credit history and outstanding debts does not always lead to an untrustworthy employee, but it may be something to be aware of.
Youtube	Are there any videos or other listings on social media that may portray your candidate to be different to the impression you get at the interview?	Skill Check	Certificates and test results may show that your employee has passed an exam or finished a course, but do they have the skill level that you require?
Qualifications	Are their qualifications valid? Have they actually been earned or is the certificate merely copied from the internet?	References	References should always be done verbally, and with a verified manager or supervisor. Not a friend or relative. Written references can never be relied on as being genuine.
CV details	Is there an unexplained gap in their work history? Do the dates for all of their previous employers match up?	Visa Check	Have you verified your employee's visa? Assuming that they have told the truth about their visa status is no protection against a \$10,000.00 fine.
ACC	What historical injuries or limitations does your new employee have? Will you have to be aware of what tasks you ask them to do?	EA Check	Has your new employee got a track record of taking previous employers to the Employment Relation Authority?
Drivers Check	Your new employee may have their drivers licence in their pocket, but is it still current? Have their endorsements expired?		
Criminal History	A Ministry of Justice background check will reveal all convictions not concealed under the Clean Slate Act.		

If you have already completed the recruitment process and are about to offer the position to the successful candidate, how confident are you that they will pass all of these tests?

Give us a call and we can carry out all of these checks for you. A full 14 point pre-employment check on your new employee will help to give you the extra peace of mind.

A 14 point check-up for only \$348+ GST

34a Somerset St, Hamilton 3204 | P. +64 7 834 0973 | E. successhamilton@wave.co.nz | www.successpersonnel.co.nz

**Call us
NOW!**

Reference Checking Template

Reference Checking Template

Name of Applicant:

Name of Reference:

Phone Number:

Introduction	
My name is <your name> from <XYZ Plumbing> and I'm calling to conduct a reference check for <name of applicant> who we are interviewing for a job. <name of applicant> has give me your details as a reference. Are you prepared to provide a reference?	Yes No
The reference check will take approximately 5 minutes to complete. Is this a good time for you? If not, when is a good time to talk?	Call back Proceed
Briefly explain the responsibilities of the job and the factors you will be assessing through the reference check. E.g. We are looking for new plumber / gas fitter and I want to check on their work history and their general attitude to work.	
General questions	
What is the nature of your relationship with the applicant? (e.g. Boss, Co-Worker etc.)	
In what role was the applicant employed by your business? (e.g. Plumber, Foreman, Gas Fitter, Drain Layer etc.)	
What were the dates of their employment? (verify against the CV to make sure the details are true)	From: To:
What type of work did <name of applicant> do when working with you? What level of responsibility did they have? (Evaluate job experience and whether they were trusted with responsibility such as running jobs etc.)	
What was <name of applicant> reason for leaving?	

Reference Checking Template

General performance questions

How would you describe the applicant's overall work performance?

What would you say are the applicant's strengths?

What would you say are the applicant's development areas (eg. weaknesses)?

Have you had any concerns with their performance?

If yes, please explain what the issues were.

How would you assess the applicants:

- reliability
- punctuality
- attendance
- professionalism
- <insert other factors where relevant>

Job-specific questions

<In this section, you should prepare your list of questions based on the skills or attributes required for the role, for example:

What experience do they have with solar water systems? How good are their problem solving skills?

In closing

On a scale of 1 to 10 where 1 is never and 10 is no question how likely would you be to re-employ <name of applicant>?

(A 9 or 10 are what you are looking for. 7 or 8 means they were ok but not great. 6 or less means they are rubbish. Don't go there!)

Great, thanks for your time today. I appreciate your comments.

PROFITABLE TRADIE.

Specialist Business Training for Plumbers and Electricians

Module 4

Create A High Performing Team



Team Boot Camp

Lead By Example



Hire Quality



**Involvement, Empowerment
& Accountability**



Systems Solutions



Core Values



Notes

A series of horizontal dashed lines for taking notes, extending from the 'Notes' header down to the bottom of the page.

Quality Assurance

Insert Logo here

Quality Control

Date:	Project:	Completed by:
-------	----------	---------------

A	UNDERFLOOR CHECKLIST	<u>Pass</u>	<u>Fail</u>	<u>N/A</u>	<u>Date</u>
1	Revise plan before starting work				
2	Checked have the right amount of fall needed				
3	Checked all pipes that have been put in the right places (stand back look at plan and floor to see if the pipes line up with everything)				
4	Checked all pipes are lagged with right lagging (felt or all proof pipe sleeve)				
5	Pipes taped off and 100mm PVC caps are on toilets or stacks				
6	If island sink, water pipes are in				
7	Drainage plan has been marked to where the pipes come out and measurements from outside walls to center of pipes have been written down on the plan				
8	Site has been back filled and made level to how it was before we started, unless they want dirt left in				
9	Signs on all sites				
10	Ensure waste pipes are securely staked in place				
11	Check all measurements are correct				
12	Stacks have x2 45degree bends at base. Provisions for terminal vent.				
13	Any back vents required				
14	Waste pipes under test for inspection				
15	T.A inspection passed				
16	Any variations to charge				
17	Remove all left over fittings and material from site				

Notes, comments:

Quality Assurance

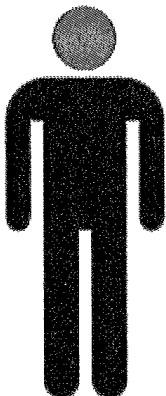
Insert Logo here

Quality Control

Date:	Project:	Completed by:
-------	----------	---------------

B	PRE LINE CHECKLIST	<u>Pass</u>	<u>Fail</u>	<u>N/A</u>	<u>Date</u>
1	Revise plan before starting work: <ul style="list-style-type: none"> • Have you got the latest version of plans • Complete fixture list received • Shower mixer depth (appropriate for lining/tile) • Basin Waste strapped • Vanity waste- In wall if wall hung • Check length of hot supply to kitchen (2L) • Bath mixer height and spout position • WC Water inlet position • HWC drain 				
2	T.A inspection completed				
3	All pipes are siliconed where they go through timber or when touching other pipes				
4	All pipes are clipped				
5	Checked pipes aren't running over manholes or any lights e.g. not running through middle of rooms, bathrooms and hallways				
6	Checked hose taps aren't in the way of down pipes				
7	Gone through house checked all pipes hot and cold are going to the right places				
8	Cut WC's pipes down to floor level and recap them with the 100 mm cap- check in right position				
9	Job has been pumped up to 1500 kpa and left for 15min or until you have cleaned up the job				
10	Swept up all our mess e.g. Bathrooms, HWC area and kitchen				
11	Checked all wingbacks for leaks				
12	All Vents through the roof and straight				
13	All shower wastes installed				
14	Flashing on roof water tight				
15	All waste pipes are in correct position including WC				
16	Mark Limiting Valve position on plan (Measurements)				
17	Job Cards Filled in correctly				
18	Sleeves of pipes to be cut off at concrete level				
19	All penetration through building wraps to be sealed				

Choose 4-6 Core Values



1. _____

2. _____

3. _____

4. _____

5. _____

6. _____

Exercise

Rules of the Game

XYZ Plumbing RULES OF THE GAME:

- Rule 1:** Hours of Work: Minimum 8.00am to 5.00pm Monday to Friday. Inform your employer if you are leaving your job earlier or in later than start time and times above. i.e. to go to the dentist, doctor etc. Be Punctual! If planning to be off work please give your employer 1 week's notice in advance.
- Rule 2:** To have time sheets on site and filled in daily at the job. They are to be returned to the office at the end of each day.
- Rule 3:** Start time and finishing times to be correct. Make sure times are correct when moving from job to job. Any discrepancy in timesheets will be seen as misconduct.
- Rule 4:** To have 15 minutes smoko in the morning and in the afternoon and 30 minutes for Lunch. Travelling to buy lunch is required to be within the 30 minute break. The smoko and lunch breaks are to be at 10.00am to 10.15am, Lunch 12.30 -1.00pm, 3.00pm to 3.15pm. Unless special circumstances i.e. pouring concrete, delivery of materials etc. Lunch will be deducted each day so if you choose not to have it you still will not be paid.
- Rule 5:** No smoking during working time. If smoking during your break please smoke outside.
- Rule 6:** To wear protective safety boots.
- Rule 7:** Limit personal phone calls during working hours.
- Rule 8:** At the end of the day clean your work site. This includes your lunch rubbish.
- Rule 9:** Produce quality work.
- Rule 10:** Respect your team mates.
- Rule 11:** If asked to do something by the owner do it as a matter of priority. Do not put it off.
- Rule 12:** If wanting to purchase tools/plumbing materials on ____ account for yourself you must ask the owner first. Order number is required.
- Rule 13:** All materials purchased for a job must have an order number.
- Rule 14:** Any broken tools need to be reported and handed to Neal not used, as this will cause more damage. Do not misuse company tools. They are to be cleaned after use if needed.
- Rule 15:** No alcohol or drug use – Instant dismissal.
- Rule 16:** Respect company vehicles and report any damage immediately. You must pay for any fine you get while using the company vehicle.
- Rule 17:** Company vehicles are to be cleaned weekly in own time.
- Rule 18:** Workshop/shed area to be kept tidy at all times.
Put pipe away behind shed.
All fittings to be put in shed.
Cardboard boxes to be flattened correctly and stacked tidily against red bin.
All rubbish in bin.
- Rule 19:** Do not throw out fittings, pipe clips, scrap etc. when cleaning out vans – sort through before dumping in Bin.
- Rule 20:** If you have a problem, **DO** talk to us so we can sort it out!

Top 5 Rules Of The Game

A series of horizontal dashed lines for writing.

Exercise

Meeting Format

Meeting Format

1. Regular, scheduled non-negotiable meetings are the single greatest and most powerful tool for transforming your group into a team.
2. The purpose of the meeting is to create the workplace your team would like to be proud of - as well as to meet the business needs and goals.
3. The meeting is best broken into 3 parts
 - a) **First 1/3** = the results of the last week(s) e.g. progress on projects, financial/sales targets met or not etc (It is a good place to find out what information the team value i.e. what they would like to know about)
 - b) **Second 1/3** = what's coming up in the next week(s): who needs what in terms of resources, manpower, assistance, who will be responsible for what.
 - c) **Final 1/3 = Creativity.** For the first few weeks (even months) this section will be devoted to dealing with the little irritations that are clogging up the smooth running of the business.

The set up for this section is to ask each person to put up on a large sheet of paper:

- **What is 1 thing that is working well in the business?**

And

- **What is one thing that is preventing this business from being even better?**

The ground rule here is that it is not about blame - no names needed

It is about defining the challenges objectively.

eg. "When I need to process the invoices on a Friday they haven't been sent through to me" rather than "Tom never gives me the job cards when I need them"

,

The improvements are then prioritised into

- a) The unchangeable
- b) That which we can change immediately for no cost
- c) That which we will improve eventually with \$ input and time.

Then Action one of the improvements suggested in category "b)"

Do this by a team member choosing responsibility for making it happen and the business ensuring resources are available. For instance, the foreman will write the Quality Assurance Checklist for finishing new houses.

What we are looking for is a **SYSTEM** solution rather than trying to change a person.

So the solution to the problem above might be to finish all job cards before leaving the job so there is no hold-ups.

Client Survey

Your Feedback Is Valued...

Client names(s):

.....
In order to improve the service that we can provide to our customers, we would appreciate valued feedback. Please answer the following questions honestly and make any comments you think applicable.

Were you pleased with the job that we carried out for you?

Yes Could you give an example?

.....

No How would you have liked that to change?

.....

Please circle the scale which best describes how you felt in the following areas:
On a scale of 1 = needs improvement, 5 = outstanding

						Comments/examples
Service/reliability	1	2	3	4	5	
Professionalism	1	2	3	4	5	
Quality of workmanship	1	2	3	4	5	
Communication with you	1	2	3	4	5	

Are there any other additional comments regarding specific builders on site?

.....
.....

If there were any problems, were they dealt with efficiently? Yes/No

Please make comment on service provided by the following contractors:

Electrician / Builder / Painter / etc

.....
.....

Thank you for your cooperation in completing this questionnaire. Your comments will help us to ensure that we are always working to produce a better result for our clients.

Can we use any of your comments in here as testimonials for other people? Yes / No

Signed

Date:

Please send or email your completed questionnaire within 7 days to:

Performance Review

XYZ Plumbing

Plumber/Gasfitter

Performance Review

Employee Name: _____

Job Role: _____

Date of Review: _____

Managers Name: _____

KEY | 1 = Never | 2 = Seldom | 3 = Sometimes | 4 = Usually | 5 = Always

Key Performance Indicators and Responsibilities	(Tick)				
	1	2	3	4	5
1. Complete all time on jobs in Fergus onsite, using the correct job number and accurately taking account of materials that need to be reordered.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2. All credits are accounted for and photo of packing slip is entered into 'Merchant Documents' under the correct job number.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3. Feedback from clients = satisfaction.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4. All broken/damaged equipment is reported immediately to your manager. (Whiteboard in the workshop to make record)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5. Clear all rubbish from jobs and dispose of correctly. Cardboard flattened into the cardboard bin and recycling done.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6. All work carried out in the expected timeframe as per the 'Schedule' in Fergus.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7. Keep work vehicle clean and in working order, checking oil, water and tyre pressure every Monday morning and top as required.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8. Create variations in Fergus ensuring time and materials go to the appropriate job number. Noting if subcontractor used or any other relevant information.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9. No call backs as a result of faulty workmanship.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10. Work site is safe at all times, according to OSH regulations and XYZ Plumbing Health and Safety Policies.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
11. Complete checklist for job as requested where appropriate.	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Performance Review

Discussion Points

What are your goals for the next year?

Are there any training programmes/courses that you think could benefit you and your role at XYZ Plumbing?

Do you have any suggestions on how we could improve the performance of XYZ Plumbing? For example, customer care, systems, staff incentives etc.

How do you feel things are overall for you at XYZ Plumbing? For example, do you get along with the other guys, are you happy with your work, what are your long term plans etc?

Are there any other issues that you would like to discuss with me?

Performance Review

The boxes below are for the Manager to complete:

What are (Name) areas of strengths over the last year?

What areas could (Name) improve on?

Discuss Pay Increases and/or plan for future pay increases.

Signatures

My Manager has reviewed this document with me. My signature indicates that I have reviewed this performance review, but does not necessarily imply my agreement or disagreement with this performance review.

Employee: _____ Date: _____

Manager: _____ Date: _____

Team Incentive Program

Name:

Date:

Rate: 1 – 5 (1=Poor 3=OK 5=Excellent)

Auvae	Bruce	Matt	Nigel	Eddy	John	Levi
-------	-------	------	-------	------	------	------

Time Management

- Arrives 5 minutes early and leaves after work is finished.....
- Takes appropriate breaks.....
- Completes a full week's work
- Completes tasks in reasonable timeframe.....
- Limits time spent on personal calls / texts etc.

Appearance

- Wears a clean and tidy uniform with pride
- Personal appearance and hygiene is good

Quality

- All tasks / jobs are completed as per plans or standard.....
- Fixes any mistakes quickly and without complaint
- Ensures he has a clear understanding of instructions before beginning a job or task....

Attitude

- Turns up with a positive can do attitude.....
- Assesses problems, discusses options and finds appropriate solutions.....
- Adheres to Health and Safety requirements.....

Politeness/Respectfulness

- Is courteous to clients and neighbours.....
- Is helpful to other Contractor's on project sites.....
- Uses appropriate language on site....

TOTAL _____

If you score above 78 you will receive a bonus of \$ 500 cash

If you score between 69 and 78 you will receive a bonus of \$ 300 ITM voucher

If you score between 59 and 68 you will receive a bonus of \$ 100 ITM voucher

If you score below 51 you owe the company team fund a box of beer.

Action Steps

Backburners

PROFITABLE TRADIE.

Specialist Business Training for Plumbers and Electricians

Module 5

Leading From The Front



Team Boot Camp

3 Bastard's Rule



The Reality



Hard Work



Read and Study



DISC Profile



Notes

A large area on the right side of the page, bounded by a grey border, containing horizontal dashed lines for writing notes.

Action Steps

Backburners

Causes Of Poor Performance

1. *They're a muppet!*

Exercise

PROFITABLE TRADIE.

Specialist Business Training for Plumbers and Electricians

Module 6

Guest Speaker – Richard Petrie



Team Boot Camp

Action Steps

Backburners

PROFITABLE TRADIE.

Specialist Business Training for Plumbers and Electricians

Module 7 Building Your Plan



Team Boot Camp



Marketing

Start
30 Days
90 Days
1 Year

	Choose Niche(s) Market(s) (e.g. Maintenance, High End Homes, HVAC etc.)			
	Unique Selling Proposal (USP)			
	Customer Database			
	Regular Newsletter			
	Record Source of Leads			
	Marketing 10 x 10 (Marketing Plan)			
	Guarantee			
	Review / Update Website			
	Landing Pages for Website			
	Lead Generation Magnet			
	Google Ad Words			
	On-Line Directories			
	Social Media			
	Strategic Alliances (Property Managers, Kitchen / Bathroom suppliers etc.)			

Start
30 Days
90 Days
1 Year

	Vehicle Signage			
	Site Signage			
	Building Signage			
	Program for Servicing Work			
	Flyers			
	Marketing Student			
	Direct Mail to Niche Markets			
	Customer Farming			
	Client Surveys			
	Plumbing / Electrical Inspection Checklist			
	Fridge Magnets			
	Switchboard Stickers			
	Personal profile			



Sales

Start
30 Days
90 Days
1 Year

	Map Sales Process			
	Test & Measure Conversion Rate			
	Sales Scripts			
	Phone Scripts			
	Enquiry Scripts			
	Prospect Questionnaire			
	Information "Wow" Pack			
	Sales Training			
	Set Price Book			
	Video and Written Testimonials			
	Quotes and Action Plans			
	Visual Sales Presentation			
	CRM System			
	Uniforms			
	Autoresponder Sequence			
	7 reasons to "Choose Us"			
	FAQ's			
	Quote Follow Up Scripts			



Systems

Start
30 Days
90 Days
1 Year

Office

	A to Z of Operations	
	Job Management Systems	
	Administration manual	
	"Cloud" Accounting system	
	Code of Conduct	
	Email Templates	
	Pre-Job Checklists	
	Quality Assurance Checklists	
	Team Induction Checklist	
	Health and Safety Program	

Start
30 Days
90 Days
1 Year

Onsite

	Equipment / Tool Management System	
	Operations Manual	
	On-Line Job Cards	
	Job cards	
	Handover checklist	
	Online Job Cards	
	Task Analysis (who, what, when)	
	Hand Over Checklist	
	Sub-Contractor Hand Over Checklist	
	Training Videos for Office Process (JING)	



Team

Start
30 Days
90 Days
1 Year

	Core Values	
	Code of Conduct	
	Job Descriptions	
	Employment Agreements	
	KPI's (Key Performance Indicators)	
	Hiring Process	
	Interview Scripts	
	Unique Hiring Proposition	
	DISC Profiling	
	Vision Statement	
	Mission Statement	
	Team Culture	
	Team Fun Days / Social Club	
	Performance Reviews	
	Organisational Chart	
	Suggestions Box	
	Incentive Program	
	Job Advertisement	



Leadership

Start
30 Days
90 Days
1 Year

Default Diary				
Personal Development				
Delegate and Outsource				
Business Strategy				
Vision Book				
Milestones				
Develop strong leaders				
Business KPI's				
90-day plan				
SMART goals				
Time Productivity				
Scheduling Tools				
Recognise longevity and performance				
Self-Directed Learning				
Implement Staff Suggestions				
80/20 Rule				
Stop-Doing List				
Exit Strategy				



Numbers

Start
30 Days
90 Days
1 Year

Price for Profit				
Use Margin not Mark-Up				
Monthly Profit and Loss				
Key Performance Indicators				
Break Even Point (Weekly, Monthly, Yearly)				
Set Minimum Gross Profit Margin				
Cash Flow Forecast				
Sales Budget				
Unit or Set Pricing				
Minimum Service Charge				
Review Pricing Strategy				
Terms of Trade				
Accounts Receivable Process				
Credit Card Payments				
Take Bigger Deposits				
Pay Yourself First				
"Sack" C & D Clients				
Improve Invoicing Time				

Your Top 10 Projects For The Next 90 Days

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Exercise

Example 90 Day Plan



My 90 Day Plan Summary

When will I work ON these strategies to build my business?

Strategy description	25-Feb	3-Mar	10-Mar	17-Mar	24-Mar	31-Mar	7-Apr	14-Apr	21-Apr	28-Apr	5-May	12-May	19-May
1 Default Diary													
2 Dream Builder/Vision book													
3 Fergus training for team													
4 Quality assurance checklist													
5 Website													
6 Guarantee													
7 Information packs for quotes													
8 Marketing 10x10													
9 Newsletter													
10 Operations manual													
11 admin manual													
12 Set quotes in Fergus													
13 Quote follow up system													
14 Hiring tradesperson													
15 Goals & Planning													
Personal Development													
Books / Videos / Seminars													
1 Celebrations with my TEAM													
2 FUN for ME													
3 Weekends away													
4													

My Key Performance Indicators

	Now	90 day goal
# Leads		
Conversion rate		
# Transactions		
Average \$ sale		
Margin		

	Now	90 day goal
Monthly sales		
Monthly profit		

SIGNED: _____

Highly Recommended Reading List

For improving your marketing results

	Topic	Title	Author
1	Networking	Little Black Book of Connections	Jeffrey Gitomer
2	Systemised Marketing	Never Cold Call Again	Frank Rumbauskas
3	Marketing Strategies	Getting Everything you can....	Jay Abraham
4	Telemarketing	Cold Calling Techniques That Really Work	Stefan Schiffman
5	Effective Direct Mail	Million Dollar	Allan Pease
6	Client Retention	Critical Non-Essentials	Dr Paddi Lund
7	How to.. step by step	Instant Leads	Brad Sugars
8	Promotions and Referrals	Instant Promotions/Instant Referrals	Brad Sugars
9	The best marketer in the world.	www.dankennedy.com	Dan Kennedy
10	Marketing Tactics	Guerrilla Marketing	Jay Conrad Levinson
11	Promotion	101 Ways to promote yourself	Raleigh Pinskey
12	Time Management	NO BS for Entrepreneurs	Dan Kennedy
13	Marketing systems & examples	Magnetic Marketing	Dan Kennedy

These are some of the best books and audios I have read and listened to on marketing, and give practical ideas you can implement into your building company to improve your marketing results.