













































Break Even = <u>Fixed Costs</u>	
Gross Profit Margin	
e.g. Office Manager = \$50,000	
Gross Profit 40%	
Office Manager	
Office Manager = <u>\$50,000</u> 40%	
= \$125,000 per year	
= \$10,416 per month	_
= \$2,404 per week	_
Prince created and one can be all and adjudged and the can be received by the size. Season of the contract was a "great", " " " " " " " " " " " " " " " " " "	
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Linday the any plant list \$\int_{\text{Liny}} \times_{\text{Lin}}	
The state of the	
Monthly KPI's	
TRADIE.	

























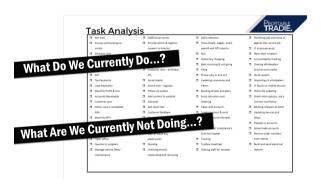












loh	Descriptions
100	Description

TRADIE.
XYZ Plumbing - Job Description - Office
Administrator

- Plumbing.

 7. Have fan, egipy 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 (accordance of leave is at the discretion of the birector)

Key Performance Indicators...



XYZ Plumbing - Job Description - Office Administrator

Key Performance Indicators: -

- All tax obligations gaid on time and accurately filed.
 Committating effectively (in both articulation and listening), with the Managing Director/Domess and Project Minager (when appropriate) to highlight any potential problems or concerns with staff workload gasliley or client relations.

 Be purtual or minar to and from work, to swill provide a high level of Customer Service at all times.

 The ability to demonstrate a willingness to share expertise.

 Salss complete in timely and accurate manner.

 Accounts gaid by Debtors Procedure.

 Accounts gaid by Debtors Procedure.

 Solow NYZ Pursibles Debtors Procedure.

 Solow NYZ Pursibles (Debtors Procedure).

 Solow NYZ Pursibles (Debtors Procedure).

 Solow S

Daily/Weekly Checklist...

•	n Managar Dally / Weekly /	Non	thly Tank Unt						Piez
	nday	Te	estay	w	ednesday	Th	enday	Fri	day
,	Answer Phone as per surgit.	э	Answer More as per single	э	Annual Phone as per ough	В	Anewer Phone as per sorge.	a	Jacobs Phare as per sample
	Make the Trage California y	2	Stake the Trage Californiay	2	Stake Pre-Trage Calicile Tray	2	State Fire Trage Calls for Tury	а	Make No-Trage Calc for Tony
	thesi year and tony's weals, print off are referent counting tools forms, address any ereal that count aftertion.	9	theck your and hony's weals, address any small that need attention	9	theck your and hony's emails, address any small that need attention	9	theck your and Yony's emails, address any small that need attention	9	check your and Tury's results, address any ernal that recell attretion.
	Log into liggs, recordin accounts for both-recording and outgoing	2	Prepare denic and descrafter each coaching session	2	Open any mail, file any sector referent traps	2	tog into their, reconcile assured: for both incoming and outgoing transactions on all accounts	0	tog till 2000, reconcile account for both incoming and outgoing transactions on all accounts
	Evenuations on all accounts including Basel Evenuation	э	Open any mail, file involves in entroper times	э	Go through accounts psystle and lead attackers		Including Server Orderprises		including Bower Dribe prison
	parameter framework	,	Manage Tarry's calmedia:	,	Manage Tarry's calendar	э	Open any mail, file involves in relevant trace		Manage Tony's calendar
	Mount has	э	tog etter these, reconsile accounts	э	say with the party recording accounts	в	Stanage Tary's calendar	0	Open any mail, the involves in relevant traps
	10:15en-CoRee		for both recenting and outgoing Variablisms on all accounts includes finger (interesting)		for both incoming and cutgoing transactions on all accounts	э	16 Litary Suffice	а	15 Tain Caffee
	3 things sent out via email and also arms humbook group page	L	including Server Orderprises	,	Including Server Orderprises (IS 1 Serv Coffine	9	clean office (ricor space, market from the common second	a	ched off boarding deets
	Propare Coaching books for							a	Office docks - as Paper.
	Tecycle/3 clients	0	De boarding new clients as required, create chemical days.	0	Build info & welcome pado -	э	Recycling		studionary glz
	Manage Tarry's celember		create initial invoice and create stoccurring scottly styces.		total C-bright books gtc	5	De boardingmen charts as mouther, marks chart in term.	0	Days of Formighty)
	Ce boardingmen charits as required, create clientim force.		process the profile reports	9	De boundingmen chants as required, create chant in ferry		made initial involve and made necessing monthly involve,	0	Send out. 5 things completed via email and also onto Facebook.
	restricted involve and create recogning monthly involve,	2	Processing credit sand payments for new clients as per on boarding		most initial involve and make recogning monthly involve,		proces Stic profile reports		South below
	process Size profile regions		their William Plan		proces list profile reports	5	Process and medit card payments. for new clients as per an issueding	0	Send out appointment reminder for all east Sunday coathing
	Process any credit card payments for new clients as per an branding.			9	Process are made surfacements for new clients as per an boarding	э	Check website payments for clearly recovered rise.	a	On Mounting one cherts; as:
				9	check to couprise				create intollineous and create
	Overk metralia payments for clients on payment plan.						Check the monthly to do led		recoouting reardily inscise, process this graftle reports
	Check the worldly to do let					5	Overk Sti Day Plan	a	Process any credit card payment for easy disely, according to board

м	lonthly Tasks
	In the first week of the month start to burn monthly educational CD's to all clients by the end of the month.
	At the end of each month send Michelle at Basketique a list of client birthdays for the next month, with name, date of birthday and address to send gift to.
	Set up Calendly link for 15 minute calls and send email to all clients requesting them to book a spot to catch up with Damon, the Monday Iweek prior to who
	they are in the calendar, usually 2" to last week of the month After Damon has completed 15 min calls the "client wins" need to be sent to all existing clients
	☐ After Damon has completed 15 min calls the "claim! wins" need to be sent to all easting claims Accounts payable for the 20" of the month
	Profit and Loss report and Cash Flow reports for both Expdus and Bower Enterprises for Tony
	Towards the end of the month set up direct diabit payments on Westpac banking for the following month
	In Payment Express check credit and payments have enough re-courring seasons so that payments aren't missed
	Friday before a Q & A webinar (usually on a Thursday), set up webinar and send invitations to all clients to attend, then on the Wednesday prior to webinar resend invitations to all clients to attend, then on the Wednesday prior to webinar resend invitations to allow the haven't registered.
	Diarise the Visa card due date and Mastercard due dates to Tony's calendar to remind him he needs to pay this on time.

Daily/Weekly Checklist...

Ma	index	Yu	esday	w	ednesday	Th	under	Fri	day
3	Check Dropbes	0	Check Brogities	0	Check Oncybes	0	Check Oraphox	0	Check Dropbox
0	Check Emails	0	Check Emails	о	Check Emails	D	Check Emails	о	Check Creab
9	Securede the bank accounts	0	Recorde the bank accounts	о	Secure de the bank accounts	0	Respecte the bank associats	0	Securely the basis accounts
3	Schedule maffines <u>singes</u> /Fergus	0	Schedule staffinks <u>School</u> Vergus	о	School de staffields <u>Singers</u> /Vergus	В	Schedule staff into <u>Singra</u> ffergus	п	Schedule staff into Singra/Fergu
3	Importing of wholesales involves	0	Importing of wholesales involves	о	Importing of wholesales impless	ь	Importing of wholesales involves	о	Importing of wholesales involces
					Morning Tea				
э	Debt collection	0	Time Sheets checked to GPS	о	Finalita Wages	D	Debt collection	п	Client phone calls, queries and
3	Client phone calls, queries and shard bookings	9	Reports, Wages into Payrell. Client phone raffs, queries and	0	Client phone calls, queries and stand bendings	0	Client phone cells, queries and	,	cleritorking (mir wholesdes involve)
3	Enter wholesalers revoces		sheet bookings	а	Chara Wholesaler Invoices &	L	client bestings	п	Chesic emails
0	Check emails	0	Genesis invetors & queries		cedits		Contra	0	Stradiling
					tunch				
	Customer involcing, Scanning COC's and attaching piecing things together, Incoming and outgoing mail	0	Customer involving, Scanning COC's and attaching placing things together, incoming and outgoing road		Enter wholesaler musices Customer involving, Sounding COC's and attaching pricing	0	Customer invoking, Scanning COC's and attaching piecing things together, incoming and		Office Risk Backup Tally and Clean office Filing
	thack emails Check calendar and phone or text		theds enails theds calendar and phone or last		things together, incoming and outgoing mail	ь	outgoing trad Chara missing mospite	0	Customer invoking, Scanning COCs and attaching piccing
	reminder to clients of their booked appointment.	ľ	reminder to diserts of their booked appointment.		Owek retains receipts Owek calendar and phase or test reminder to disents of their	9	Check calendar and phone or both reminder to alterits of their		things together, incoming and outgoing mad Guilling
					booked appointment.		backed appointment.	ь	Check emply
								0	Check calendar and phone or to reconder to checks of their



Admin Manual...



Contents
Contact details
Important Logis Details.
Contact Details for Outsourcing.
Plumbers Coach - Default Dony
As Overview of Monthly Activities
Aroweing the Phone
Taking a message, note
Vaice Messages
Process when get a call interested in Business Coaching
Mail
Empty Maribox
Handing mail
Filing
Reminders
Sending Group Mail to Plumbers Coach Team
Ordering Stationery
Where we order office supplies from?
Business Cards
Presentation Fulders (for Info, Welcome Packs etc.)
Cusching
Levels of coaching programs -
Steps for planning one-on-one Coaching appointments
15 Min phone calls
Weekly [Friday] Coaching Appointment Prep.
New Clerits
On boarding process
Initial Payment.
Gift for Client
Appointment planning for new clients
Processing DSC reports

Content details Page Allane Lock City, Names have Lock City, Names have Page Allane Page

Contact Details...

Passwords...



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Phone Process...

Mail...



Payroll...

aumonic rice group to finalsing the payment http://www.sat.com/b
(mail paysigs and upload payroll data to http://www.sat.com/b
To either add a new person to payroll or to terminate an employee or for any other or sat.com/b
Smartpayroll 0800 10 10 38

Accounting

XERO	
Daily reconciling of incoming and outgoing payments http://occent.oor/	
Mouthly Invoices due for payment Mouthly necessed to be paid on the 20° of each month and they need to be given to Tony to complete this.	
Invoices are paid a morth behind. If an invoice was received between the OL/2-3L/00 it is then paid on the 20° of the following month.	
Sower invoices need to be separated cut from Excels invoices as they are paid by different accounts.	
Here's a JINO on how to load bills to pay into XENO http://screencert.com/ly	
On aggrees 19" of the month-give the folder of invoices to pay to Tony to approve for payment.	
Create new client, How to create a new client in <u>Yang http://xxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxxx</u>	
Create new lavoice How to create a new invoice in <u>Net</u> http://screeccus.com/t/	
Create new reoccurring monthly invoice who to ordic a new reoccurring words more in IGRO https://www.create.com/	
Credit notes How to create a credit note in large http://www.screencest.com/l.	
Profile and Loss, cashiften or protein of the annual country of the country of th	
GST (bi-monthly) landy Advances	
Filing the GST return	
·	

Banking & Finance...

Banking and Finances	
Payment processing	
Process for Adding now succes to the Business Co-Line Basising Direct debits http://orestoort.new/d/	
Credit Card payments Checking for transactions - (http://www.com/com/)	
Add new billing cards, processing transactions and setting up re-occurring monthly credit card payments - <u>http://www.scroenced.com/</u>).	
Direct Diebit Payments Setting up new client on direct debit - http://www.screenist.com/l/.	
Processing monthly payments - http://screenced.com/ly	
Investiging and Credit Carel forms There are a range of involces and credit carel forms for Plumbers Coach Clients	
Tiero Conching Programs analiable	
Million Dollar Tradio 3 payment options: Monthly, 6 month upfront (15% discount), 12 month upfront (15% discount)	
Platinum 3 payment options: Months, 6 month uphont (10% discount), 12 month upfreet (25% discount)	
NOPMS Shareholders — They receive a SN discounted price on their coaching programs. The two coaching programs given as will the sares WRIBER OFMs Planeher and Multimentj and they still have the 2 preparing spices (promptly, presents or at promptle).	
Client payment utherlails Each deet paymenthy. These payments start from the day of signing the contract and recur on the same day of each month. These payments start from the day of signing the contract and recur to the same day of each month. However first to "human processing" for instructions and how to do	
Фа.	

Client Care...

Clear Christopher We There Things and Edine Up In you below you and make the first to the first plan of an interest to the control of the co		
the state, under another about the state of	Client Care Program	
And an office shade place and office shade place shade and shade place shade p		
As a region of the control of the co	Hi Guys,	
Clear Total Clear	What are the 8 main tasks you're going to work on this week?	
Interpretation and an interpretation of the second control of the	Flick me either a quick plats, or entail by the end of the day, with the three tasks you're going to get done by this Friday, and see how much more you get completed.	
The region and with bill of an and issues. The compared and the bill of an and issues. The compared and bill of an and issues. The second and the compared and the second and an	P.S.hers's mine;	
Learn process for the state of the control to the c	Every Ariday, fullow up Monday's email with the below	
The state of the s		
As the state of th	Every great week is full of wins and lessons	
Clear William - in citie of producing control to account of the control of the c		
ten unt für van Anstitung für is janzeit. - in der Erne Erne Erne Erne Erne Erne Erne Er	P.S Herr are mine	
* Use of a finite device of the control of a finite device of the con		
one can available the facility by colors and profit in colors by colors of the district of the colors by colors and colors	Make a list of brightest achievements	
Clear Clin we will happen for regarded ment that an integrating ment to G these any rook below, follow, fourth, or the ground process, to the control of G these any rook below, fourth, fourt	 Clients are added to the birthday list when as part of the onboarding process. (they disclose their birthday as when they complete their tensors that) At the end of each month send Michelle from Residency an email with next months birthdays. Teither the cites of birthday, same and address of the client. We have a standard 	
Michael for Makadapa and appares the will be c. \$7.950 GHz For MB Takes and a substance and other was considered and apparent price of the substance (Michael Section Apparent and Appare	Client Gifts	
Facebook group where we can chare wins and ops ets and another touch point Sony can have with	These may include: Bables, Weddings, Funerall, New Office opening parties est. You can call Michelle from Basketique and organise this with her. 07 SET 67SE?	
	Facebook group where we can share wins and tips etc and another touch point Yony can have with	



https://www.techsmith.com/jing.html Download it Here

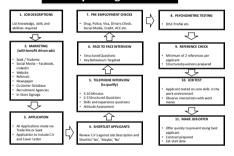








11-Step Hiring Process...





Interv	iew
1111(214)	

Writing & Numbers Test...

TRAL

- Write % as a decimal and as a person
- When is the Control of Assessible 1

 Please rewrite this except from pioce of marketing naturial for a building company. The tile of the ebank was "10 Secrets Owners of Recordy Built Homes With they Knew Poter

spelling. When Statisting is a practices statist must observ. When you can have a desire on the contents of takes longer than some other parachalog transactions and fluorists the ability for decision of takes longer than some other parachalog transactions and fluorists the ability for the decision and the contents to the completely is even more important.

It is the largest parachase that enter people will undestate in these loses and fluorists heritage and an advantage for matching principal for contains of your losses in important and automates the must have performed for contains of your losses in important.

This is the basis of Welcome Hinnes and what we stand for. We are a Walkinto based independent home construction company that is not remail by a function who wants volumes to the standard of the character point proble. We half a few beause for client who want there input into these crutions and using our methods and systems they don't have to spend a fortune

2. We are planning a direct mail companies to local Railding companies (Hi in total). Plans complete a budget for the companies showing the estimated out of the companies (with your working). The company mil interprise of a latery followed 5 - Jacq show be a particul. Each better will include a minimum radix cube an antimum gradies. The logistical distant are included before (pure I we show no set an estimation gradies).

Printing Cost = 15 costs per page Sales Letter = 8 mores



Interviews GeorGoro for Office Administrator / Manual

- Asses Modelfly and can't work with them day tended?
 Test his behavioral appropriations:—Prowtishy, Spr., Initiative, Crises to Ashaviorant
- Administrati

 Transfe of age See they bugh! Stalis background / Self-confidence.

 Transferror with software / transferring etc.
- things we are holding for in this role. Over their handground, Simils also have a militaria of a militaria of the discount rate has set that discount rate has been recommended in the set of the recommendation of the recom
- What qualifies do you think are necessary to make a success of this job? (On they understood what qualifies are necessary for soccess in the role).
- How would your co-workers describe you? Shalos shouldy bow they will "\$" with your business callural.
- What is you do for her? (helps strongly presently characteristics, e.g. convice / (finestrongly constraint show other intensity).
- Flowershing gate according to does what would you like to achieve and where do you se amused in the asset time? (Are they driven to asset and before themselves if the asset to the action of the ac
- seren't are knerto athieve? What did you do? How did you manage? What was the result? What would you do differently next time?
- whether it be at more, wowenity or sports / calcust? What trade you aucosoful in that shadoo? What specific actions lead to your success?
- 9. What are your 3 ideal qualities that you next in a job? Affait do they value in the work
- What are your 1 steel qualities that you past in a job? Miner do they value in the we setting, e.g. went lists of secul centest. DET like to learn and develop. Or pul? Now Sur. Deval?)
- What new the best may be you to be delegated a test? (For they are leader who needs direction and passioner or a follower who needs based totaling!)

11. What are your strengths as a person l

- 13. Tell rea about your experience with different types of software. NS Office, CMD, Facebox
- 24. (In taking with three people after the phone interview. Why should we hire you?
- Explain about the breadth of the rale (No through the sid Description or they analysts what Ne jak involves)
- 28. Talk through our values and ask from to give examples of how they have demonstrated.

 When when in their conditions?
- This brough your values and each thorn to goe exemptes of how they have demonstrate.
 These values in their cost limit?
- Lad con last quartor. We are super to fill this position as soon as possible, so thing is a important laster. How soon could you start if we decide to after you the pub (Yest) loyer
- important factor. How some could you start if we decide to after you the yel? (Yest) as will if the person is prepared to "jump obly" without serving out their notice period they could well do the same to you).

Interview Template...



_	Wednesday 16/11/2016
	Macabach 2 hours save your files in the following folder: C10ropbox\Administration\Carolus Revnolds - Job 1
1.	Jing: Install the program called Jing. This is a screen capture program that records your
	screen. Once you have installed the program onto your computer, take a video capture
	(training video) on how to send an email. Send an email to: tox-thorofroblemadis com-w
	the subject line "thanks" and message "it would be a privilege to work here". This video
	recording will produce a link in the URL Copy and paste this into a word document and so
	it is your job text folder. (20 Minuted)
2.	General Admin Tasks: For this section you will be using the administration manual
	located in: dropbox/plumberscasch/administration/admin manual/2006 profitable trad
	admin manual1.
	You will also be using Nero. You can find the log in details for Xero in the administration
	manual. This manual has sing recordings of how to complete each task: (80 Minutes)
	When using Xero there are two companies. Please use the Exodus Trust company, you w
	know by looking at the top left of the screen which company you are in.
	Contain a new clear in Years—
	His contact details are:
	Company.

No. come decision on Company. Company.

Excel: Merge and sort two lists.
 There are 2 customer lists located in your job text folder. Using excel, combine t lists and remove the double ups. Once you have done this, sort the list in alphabetical order. (bit minutes)

- Power Point: Replicate an 6 slide PowerPoint presentation from the slides handout.
 These slides will need the writing as shown in the notes. They will also need a hasignouring exhibit relates to the slide. There is an example similar slides in your job test folde.
- 5. <u>Powert Logistics Plan</u>: write up a logistics plan for Profitable Trader's upcoming the for Systems Boot Camp. The Boot Camp is no fixer times a year for our cleent, and is also marked to do other prospective Camers. Tony will spend the day preventing and stacking our cleens about putting the right systems into their business. We are also excited to be having a Mystery Word Sysaker at the exercit (184 Missacs).
 - a. Write-out an event timeline for our One Day systems Boot Camp and how you woul go 2 bout planning it (maples that you will be implementing this concorne). The Boot Camp will be held in Auditad, February 18" 2817. There is an example plan template in your job test folder.
 - Things we will be looking for any:

 Planning of the event lookings. Sp. Venue, equipment et
- Please save your files in the following folder: C'(Dropbox)/Administration/Carolys Reynold Job Test
- Total time allowed = approximately 2 hours plus a 20 minute discussion at the end.
- At the end of your trial day, you will present your ideas to the team and you will be given critical
- You are <u>verticeme</u> to ask questions, everyone in the office is available
 You also have access to our library in our office and also files on our drive to help you will
- your job text see C. \Dropbox\Administration\fuels\(fuels\) sub-text.

 We are looking at your approach to problems and how you deal with them not just the finished product.

















	Systems Resources		
	A.Z.To Cinerations		
	d administration Manual		
	Hazand Co Webinar Bildes		
	How To Systemica Your Business		
	Figure Pricing Example		
	Ø ■ Office System Checklist Example		
	✓ Important Checklist Example On Site System Checklist Example		
	Fig. 200 Checklet		
	Quality Assurance Checklists		
	Sofeti Checklist		
umloads T	o Help		
Willoaus	and the state of t		
	Task-Analysis	-	
	Team induction		
	 + Add Category / + Add File 		













Flick It Through To The Team...

Merry Christmas From The Profitable Tradie Team!

