

The Op's Manager Solution

With Phil Smith



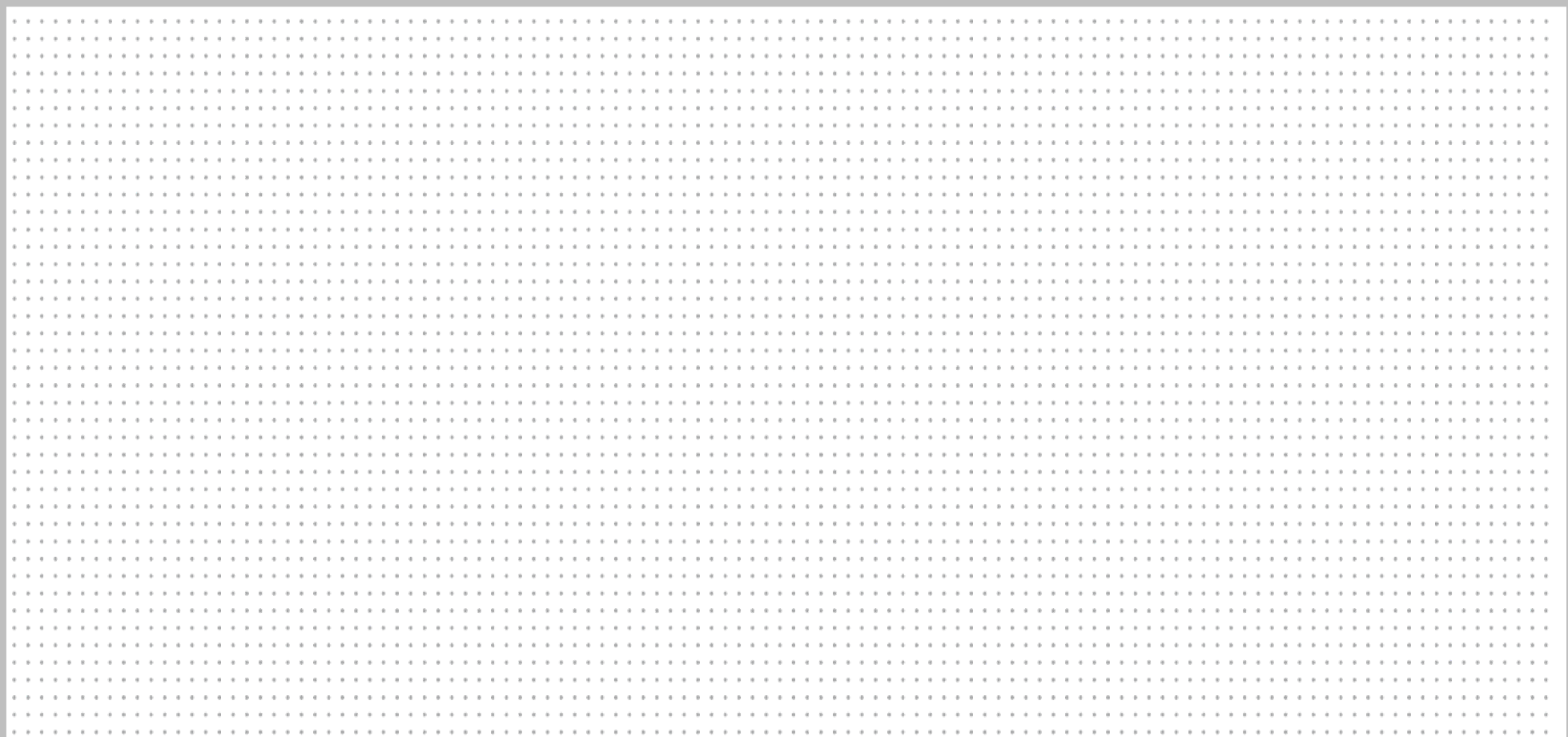
5 Key Principles...

1. Map The Roles...



2. Hire Well...









Task Analysis – Business Owner

- Time on tools
- Supervising staff on tools
- Schedule jobs
- Bank reconciliation
- Check payments
- PAYE
- GST
- Tax Payments
- Load Payments
- Monthly Profit & loss
- Accounts Receivable
- Customer care
- Follow up on completed jobs
- Monthly KPI's
- Stationary orders
- Annual Accounts
- Health and Safety
- Clean office
- Queries to suppliers
- Manage vehicle fleet/ maintenance
- Staff/social events
- Project Management
- Marketing strategy
- Newsletter
- Client events
- What's on report
- Customer care – birthdays etc.
- Social media
- Direct mail/Lumpy mail – logistics
- Follow up quotes
- Add content to website
- Adwords
- Get client lists
- Customer database
- Document shredding
- Check drop box (Mail box on outside of office for staff to leave any paperwork)
- Quoting / Pricing
- Checking emails, responding and removing
- Debt collection
- Building business systems
- Time-sheets, wages, smart payroll and GPS reports
- ACC
- Stationary shopping
- Mail incoming & out going
- Filing
- Answering and making phone calls
- Updating insurances and claims
- Booking of jobs and diary
- Stock allocation and ordering
- Liaise with accountant
- Create invoices & send
- Power accounts (Genesis and Delta)
- Certificate of compliance's Scan and repeat
- Training for team
- Toolbox meetings
- Chasing staff for receipts
- Appraisals, "20's", etc
- Clarifying jobs and book in against the correct job
- IT improvements
- New client creation
- Accountability tracking (KPI's)
- Chasing Wholesalers invoices and credits
- Stock management
- Travel
- IT Faults on mobile devices
- Client file updating
- Interruptions, rep's, clients, couriers and family
- Banking cheque's at bank
- Updating devices and setup
- Payable's/ accounts
- Setup trade accounts
- Receive order numbers from clients
- Build and send electrical reports

Job Descriptions

Role 1

Tools (80%)

20's

Meeting with Clients

Role 2

Building Systems

Pricing

Delivering Quotes

Accountability Tracking

Scheduling

20's

Toolbox Meetings

Meeting with Clients

Role 3

Tools (50%)

**Running around after
staff**

Delivering Materials

Stock Management

Deliver Quotes



