

WELCOME TO THE MILLION DOLLAR TRADIE INTENSIVE!

- The Schedule -

We'll be getting started on time each day at:

NZ (Thursday 17 March)
9.45AM NZDT

AUSTRALIA (Thursday 17 March)
4.45AM AWST : 6.45AM AEST : 7.15AM ACDT : 7.45AM AEDT

CANADA (Wednesday 16 March)
1.45PM PDT : 2.45PM MDT : 3.45PM CDT : 4.45PM EDT : 5.45PM ADT : 6.15PM NDT

USA (Wednesday 16 March)
10.45AM HST : 12.45AM AKDT : 1.45PM PDT : 2.45PM MDT : 3.45PM CDT : 4.45PM EDT

We'll have regular breaks and we'll be finished each day by 4.30pm NZDT.

- Get the Most From Your Days -

We're working here people.

Clear some space where you won't be interrupted.

Grab a hotel room and make an occasion of it - no interruptions from the office or the family. Get food delivered by room service and go out for a nice meal.

To get the most from the event you'll need to remove all distractions so you can concentrate 100% on the Intensive.

Sort your technology out.

Get online early. Or better yet, the day before. Make sure you have the latest Zoom updates installed, that your internet connection is solid, and your webcam and microphone are both working.

We'll be working in Zoom Breakout Rooms so it'll help if you can see your Zoom buddies and they can see you. So, you know, wear pants. 😊

Pack snacks.

Pack some snacks & food for the breaks and have plenty of water handy. The day will flow more easily if you sort your treats out ahead of time.

*The Momentum
Gameplan*

1

2

3

*The Insurance Policy
(Plus)*

1

2

3

Client of the Quarter

Mastermind

1

2

3

*The Upselling
Maximiser*

1

2

3

The Business Breakout

1

2

3

The Meta Project

1

2

3

Spotlight

1

2

3

*The 6 Week Planning
Cycle*

1

2

3

The Momentum Gameplan™

Past | Wins & what’s working well?

Future | What are you most excited about?

The Next 2 Days | What 5 things do you want from this Intensive?

1

2

3

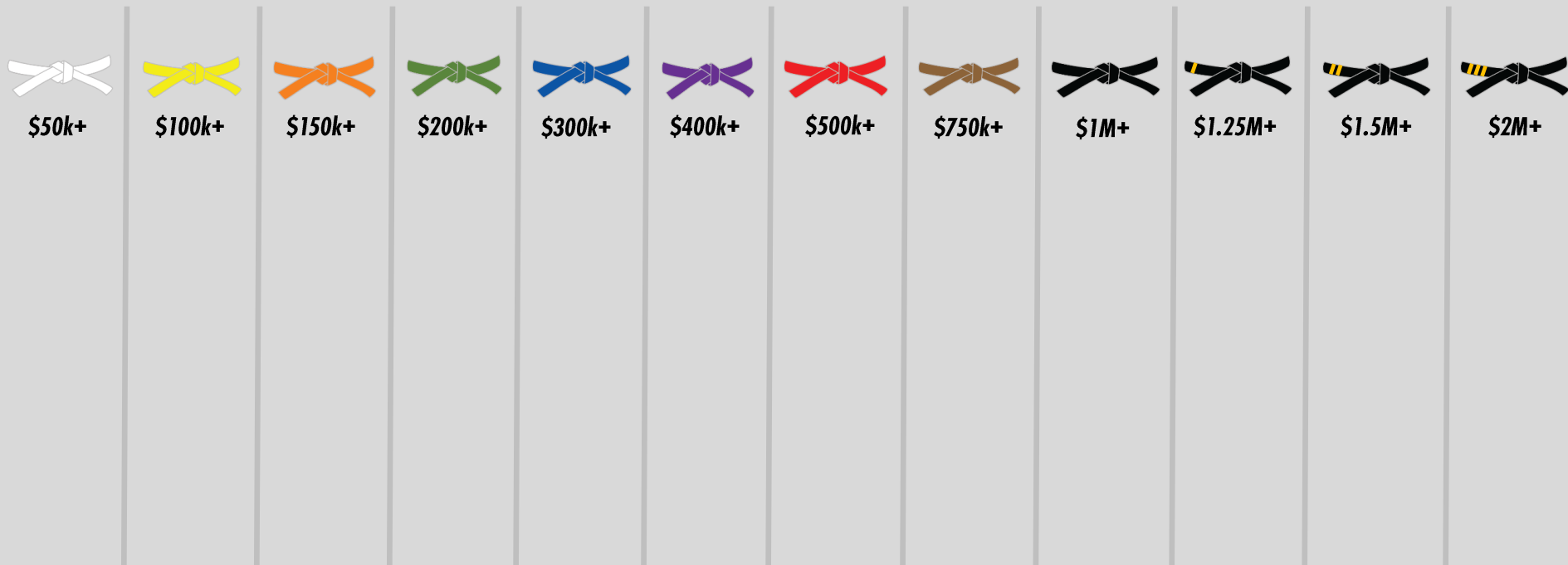
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5

THE PROFITABLE TRADIE ROADMAP

	Financials	Systems	Team	Marketing	Sales	Leadership	
SIGNIFICANCE \$5M-PLUS	Risk Management Strategy <input type="checkbox"/>	Drive Automation to Improve Efficiency <input type="checkbox"/>	Hire a General Manager <input type="checkbox"/>	Optimise Current Marketing Channels <input type="checkbox"/>	High Level Relationship Building <input type="checkbox"/>	Board of Directors <input type="checkbox"/>	
	Manage Balance Sheet <input type="checkbox"/>	Develop a Franchise Prototype <input type="checkbox"/>	Coach & Nurture Management Team <input type="checkbox"/>	Outspend Competitors to Dominate Market <input type="checkbox"/>	Drive Sales Conversions <input type="checkbox"/>	Acquisitions/ New Markets & other Growth Strategies <input type="checkbox"/>	
	Drive Business Equity Value <input type="checkbox"/>	On-line Directory of Systems & Processes <input type="checkbox"/>	Create Succession Plan <input type="checkbox"/>	Become Market Authority <input type="checkbox"/>	Build Sales Team <input type="checkbox"/>	Personal Meaning & Well Being <input type="checkbox"/>	
SCALE \$2M-\$5M	Measure Work in Progress <input type="checkbox"/>	Write Operations Manual <input type="checkbox"/>	Build Management Team <input type="checkbox"/>	Develop Comprehensive Marketing Plan <input type="checkbox"/>	Appoint Business Development Manager <input type="checkbox"/>	The Buy Back Principle <input type="checkbox"/>	
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	Planning for Profit & Budgets <input type="checkbox"/>	Build Pricing Templates Fixed pricing <input type="checkbox"/>	Employer of Choice Strategy <input type="checkbox"/>	Appoint Marketing Co-Ordinator <input type="checkbox"/>	Hire an Estimator <input type="checkbox"/>	Identify Your Genius Zone <input type="checkbox"/>	
STABILITY \$500K-\$1M	Accounts Receivable Process <input type="checkbox"/>	Administration Manual <input type="checkbox"/>	Core Values <input type="checkbox"/>	Track Marketing Results & ROI <input type="checkbox"/>	Map the Sales Process <input type="checkbox"/>	Complete Vision Book <input type="checkbox"/>	
	Design Monthly KPI's <input type="checkbox"/>	Quality Assurance Checklists <input type="checkbox"/>	Rules of the Game <input type="checkbox"/>	2-3 Marketing Strategies for Target Market <input type="checkbox"/>	Implement Servicing Program <input type="checkbox"/>	Pre-loaded Year <input type="checkbox"/>	
	Implement Profit First <input type="checkbox"/>	Cloud Based File Storage <input type="checkbox"/>	Appoint Office Manager <input type="checkbox"/>	Quick Response Marketing Tools <input type="checkbox"/>	Follow Up Process <input type="checkbox"/>	Create a Stop Doing List <input type="checkbox"/>	
SURVIVAL \$300K-\$500K	Run Monthly Profit and Loss <input type="checkbox"/>	Install Job Management Software <input type="checkbox"/>	Job Descriptions <input type="checkbox"/>	Create Website <input type="checkbox"/>	Enquiry Script <input type="checkbox"/>	Time Productivity Analysis <input type="checkbox"/>	
	Back Cost all Jobs <input type="checkbox"/>	Install Accounting Software <input type="checkbox"/>	Improve Hiring Process <input type="checkbox"/>	Build Social Media Presence <input type="checkbox"/>	Take Deposits <input type="checkbox"/>	Default Diary <input type="checkbox"/>	
	Price for Gross Margin <input type="checkbox"/>	Install Payroll Software <input type="checkbox"/>	Regular Performance Appraisals <input type="checkbox"/>	Build Client Database <input type="checkbox"/>	Upselling Process <input type="checkbox"/>	Audible & Business Books <input type="checkbox"/>	
STARTUP \$0-\$300K	Get Paid Now <input type="checkbox"/>		Attract A Players <input type="checkbox"/>	Decide Target Market <input type="checkbox"/>			
	Fix Payment Terms <input type="checkbox"/>		Create Hiring Process <input type="checkbox"/>	Sharpen Key Message <input type="checkbox"/>			
	Filter Job Enquiries <input type="checkbox"/>		Make Irresistable Offer <input type="checkbox"/>	Choose Marketing Method <input type="checkbox"/>			

The Belt Levels



Net Profit Accelerator

* Required



Your Business Name *

Your answer

Next

Net Profit Accelerator

Net Profit (\$)

* You don't need to fill out the Net Profit Accelerator if you are a team member or a guest

November 2021

Short answer text

December 2021

Short answer text

January 2022

Short answer text

February 2022

Short answer text

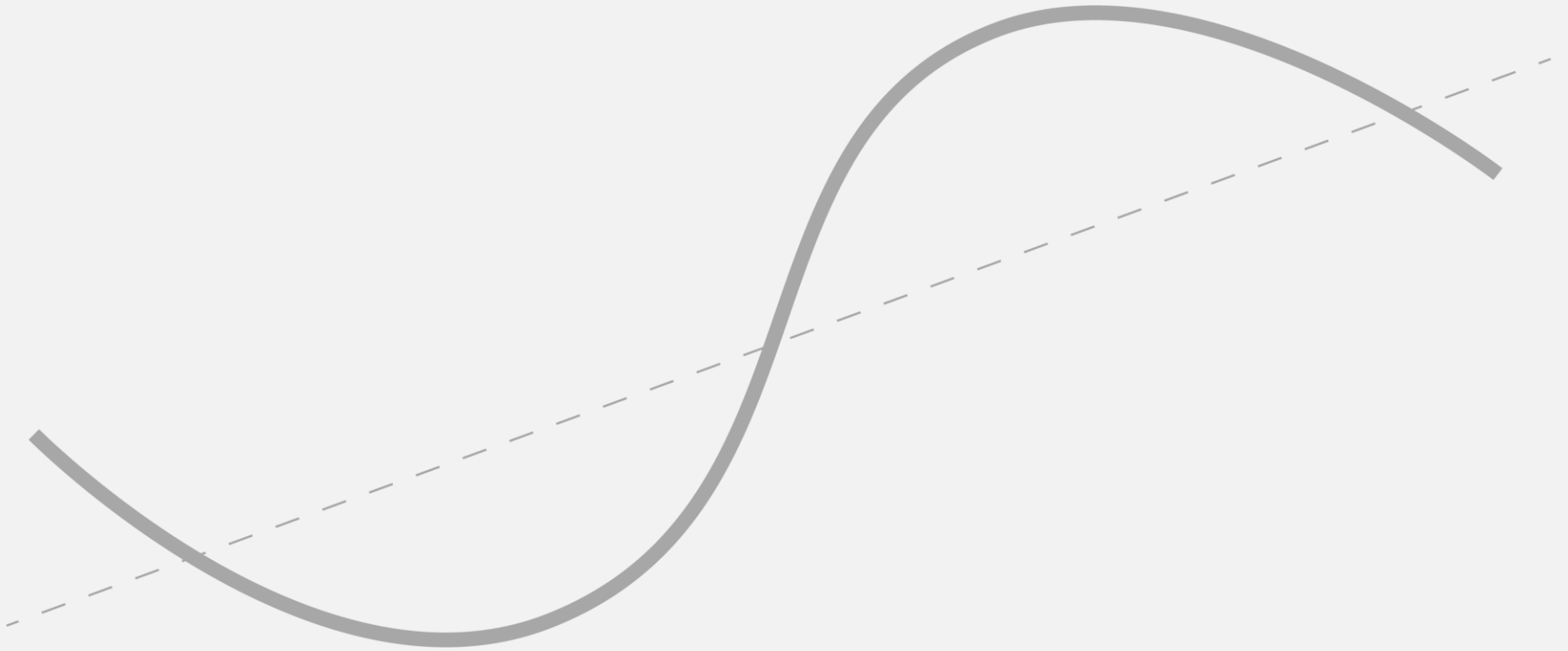
Back

Submit



THE INSURANCE POLICY (PLUS)

The Economic Cycle



5 Key Principles

1. Recognise Lag...

2. Play Defence...



3. Two Speed Economy...



4. Spread the Risk...



5. Think Long Term...

The Insurance Policy (Plus)



24 SIMPLE WAYS

TO PROTECT YOUR BUSINESS

YES ☐ NO ☐

Invoice all larger jobs on percentage complete rather than project stages so supply hold ups don't prevent you from completing a stage and being able to claim. Otherwise, you may be almost completed but unable to claim and your cashflow will be severely affected.

YES ☐ NO ☐

Change all quotes or bids to be **valid for the shortest possible time** (e.g., 7 or 14 days instead of 30 days)

YES ☐ NO ☐

Include cost increase clauses into your contracts for quotes or bids that are for longer jobs. Discuss this with the client upfront and suggest that the building contractors you price for include something similar in their contracts.

YES ☐ NO ☐

Buy materials when job is accepted at today's price and charge the client for the materials at job acceptance so you can guarantee supply and lock your margin in.

YES ☐ NO ☐

Communicate 3 times as often with your suppliers about upcoming projects and materials availability. You may need to talk with the supplier almost daily about the "state of play." Remember the "squeaky wheel" gets the oil.

YES ☐ NO ☐

Be considerate and helpful when dealing with suppliers as strong supplier relationships will be a "secret weapon" in the coming months and years.

YES ☐ NO ☐

Increase your target gross profit margin on jobs by 10% to factor in the price increases and potential project delays (increase both Labour rates, material mark-ups and subcontractor mark-ups).

YES ☐ NO ☐

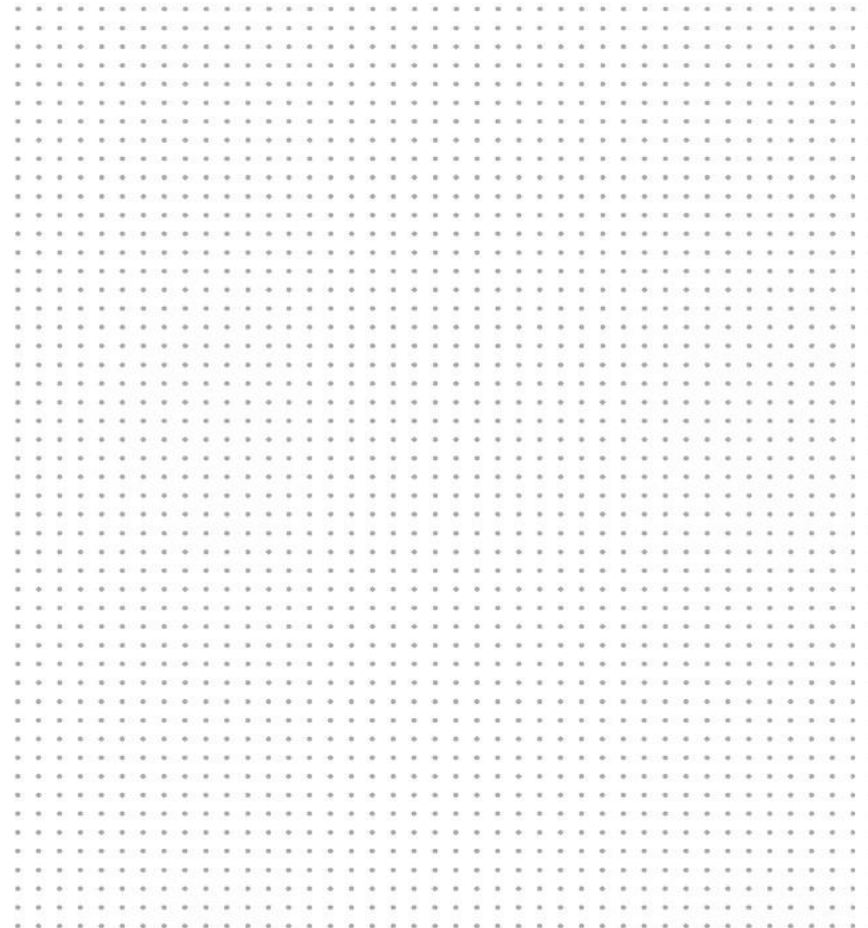
Include, or increase, the **project management fee** you charge to account for all the extra running around sourcing materials and organizing around project delays

YES ☐ NO ☐

Use an on-line price book direct from your suppliers and ensure that all supply prices are up to date daily.

YES ☐ NO ☐

Work in with similar businesses in your local area to **improve your purchasing power** with suppliers



YES ☐ NO ☐

Rent a warehouse and stockpile materials at today's prices. The lease costs may less expensive than the increased material costs and delays to production.

YES ☐ NO ☐

Create accounts with additional suppliers who may have access to different product lines that you can use to substitute for your usual product.

YES ☐ NO ☐

Spend more time on project management in terms of planning your schedules, communicating with other contractors around project dependencies and sourcing materials. Project delays and downtime cost your business thousands of dollars.

YES ☐ NO ☐

Buy as much material at today's price, charge your clients a higher deposit and a storage fee.

YES ☐ NO ☐

Communicate early and openly about the challenges around sourcing materials with all clients. Explain that cost increases in materials will have to be passed on otherwise you will be unable to commit to the project.

YES ☐ NO ☐

Discuss client selections around fixtures and fittings early and **guide clients toward the options that will be most available.** Explain the consequences for project timelines if clients prefer "hard to source" items.

YES ☐ NO ☐

Have plenty of smaller service or maintenance work to **fill the gaps between projects** so that labour utilization and cash flow can be maintained.

YES ☐ NO ☐

Factor in storage and extra handling costs to pricing if using storage or buying in advance and in bulk.

YES ☐ NO ☐

Be wary of project variations which may require additional materials and / or changes to the project timeliness. Anything that requires re-pricing, re-ordering or schedule changes could take considerably longer than usual.

YES ☐ NO ☐

Charge a substantial variation fee to cover the extra logistics involved around pricing, ordering and project management in the current climate

YES ☐ NO ☐

Adjust the payment terms with your suppliers. For instance, offer to pay a deposit on materials to secure supply. Use the clients deposit money to cover the payments.

YES ☐ NO ☐

Increase the amount of client deposits to improve your cash flow through the ordering cycles.

YES ☐ NO ☐

Create relationships with additional sub-contractors so that if project timelines require it, you have a Plan B and Plan C if your usual contractors are unavailable.

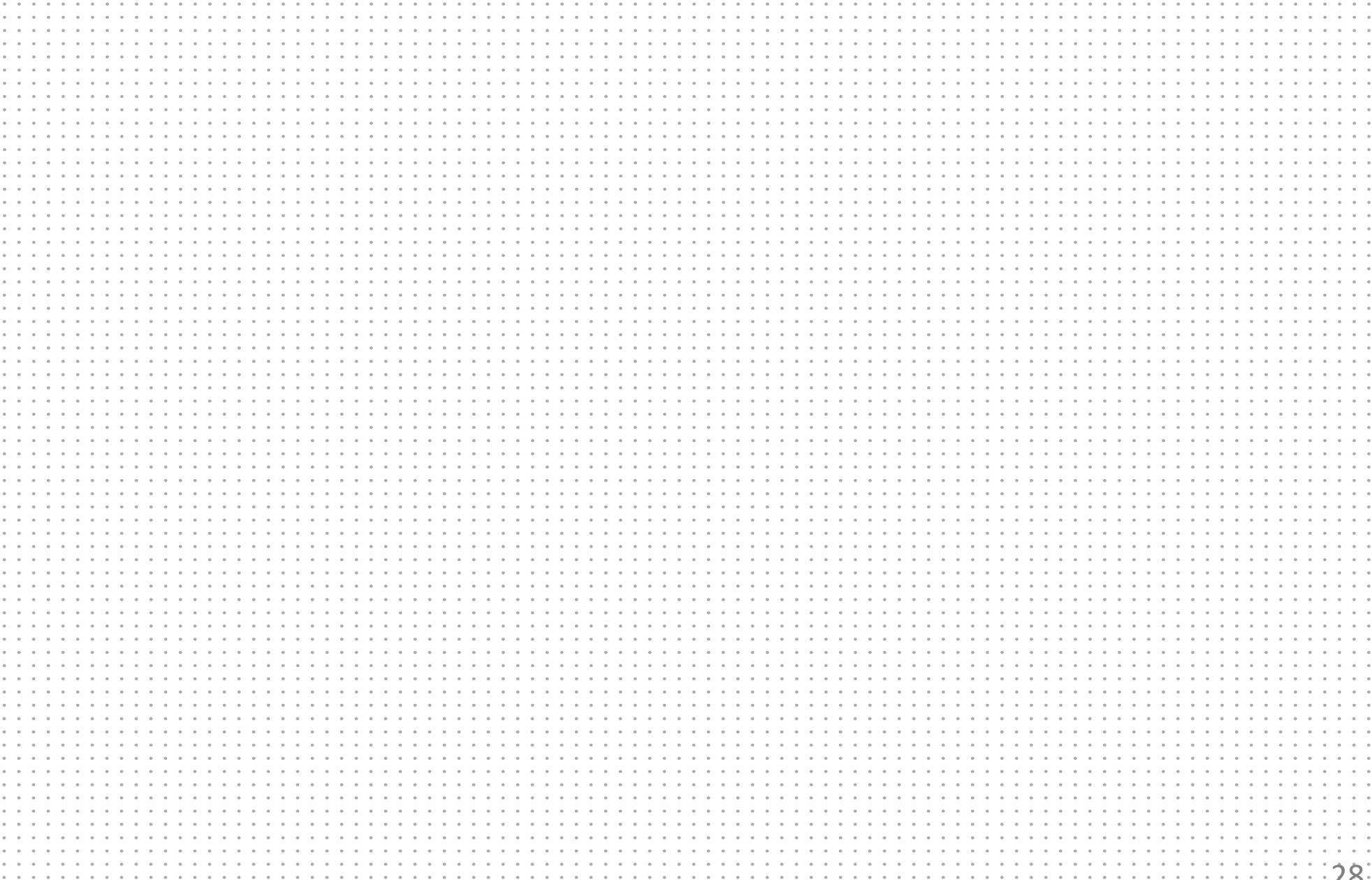
YES ☐ NO ☐

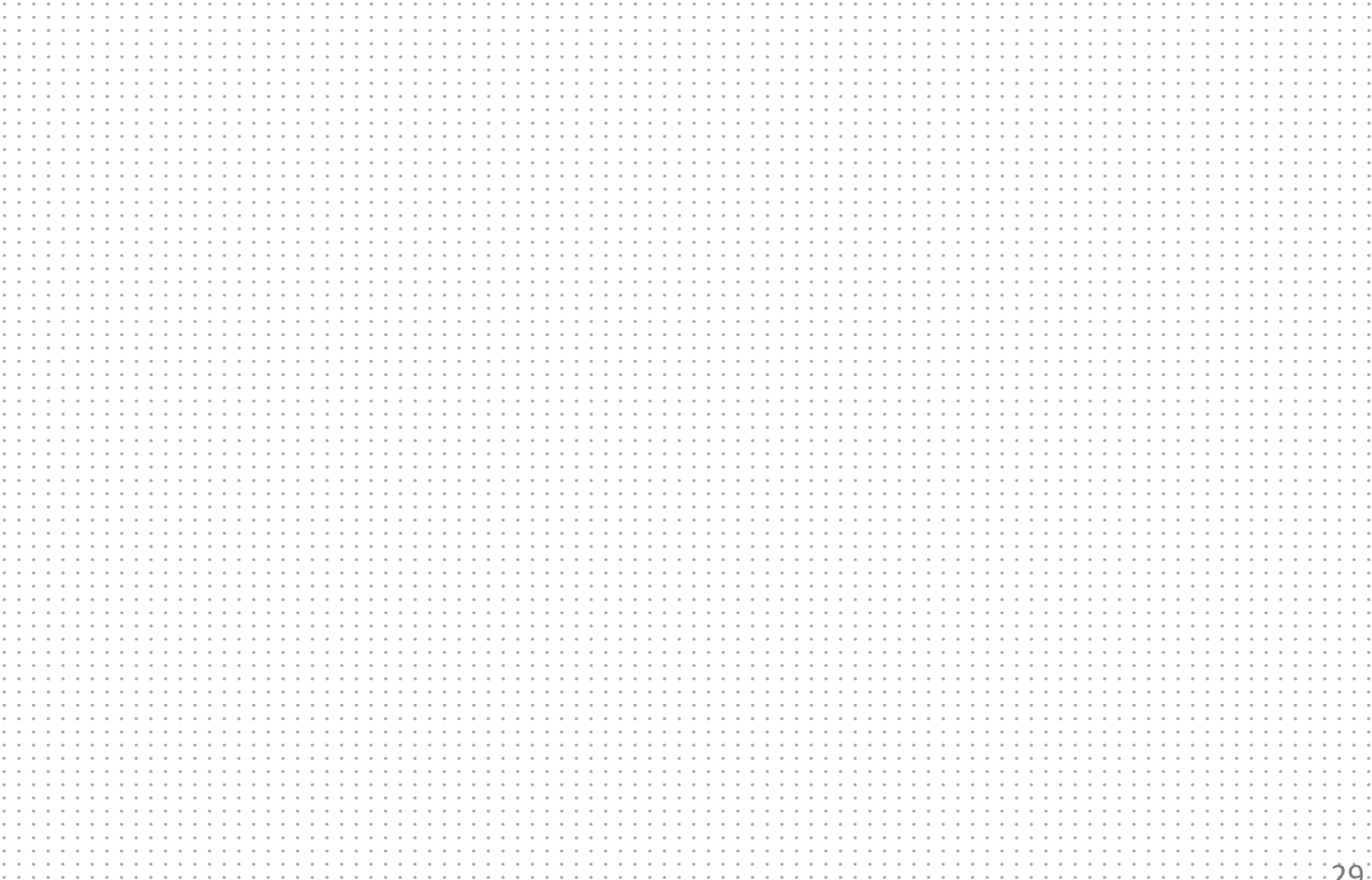
Increase your gross profit margin (on job profits) to cover your rising overheads (everything from fuel to interest rates are surging up right now).





CLIENT OF THE QUARTER









MASTERMIND



The Mastermind

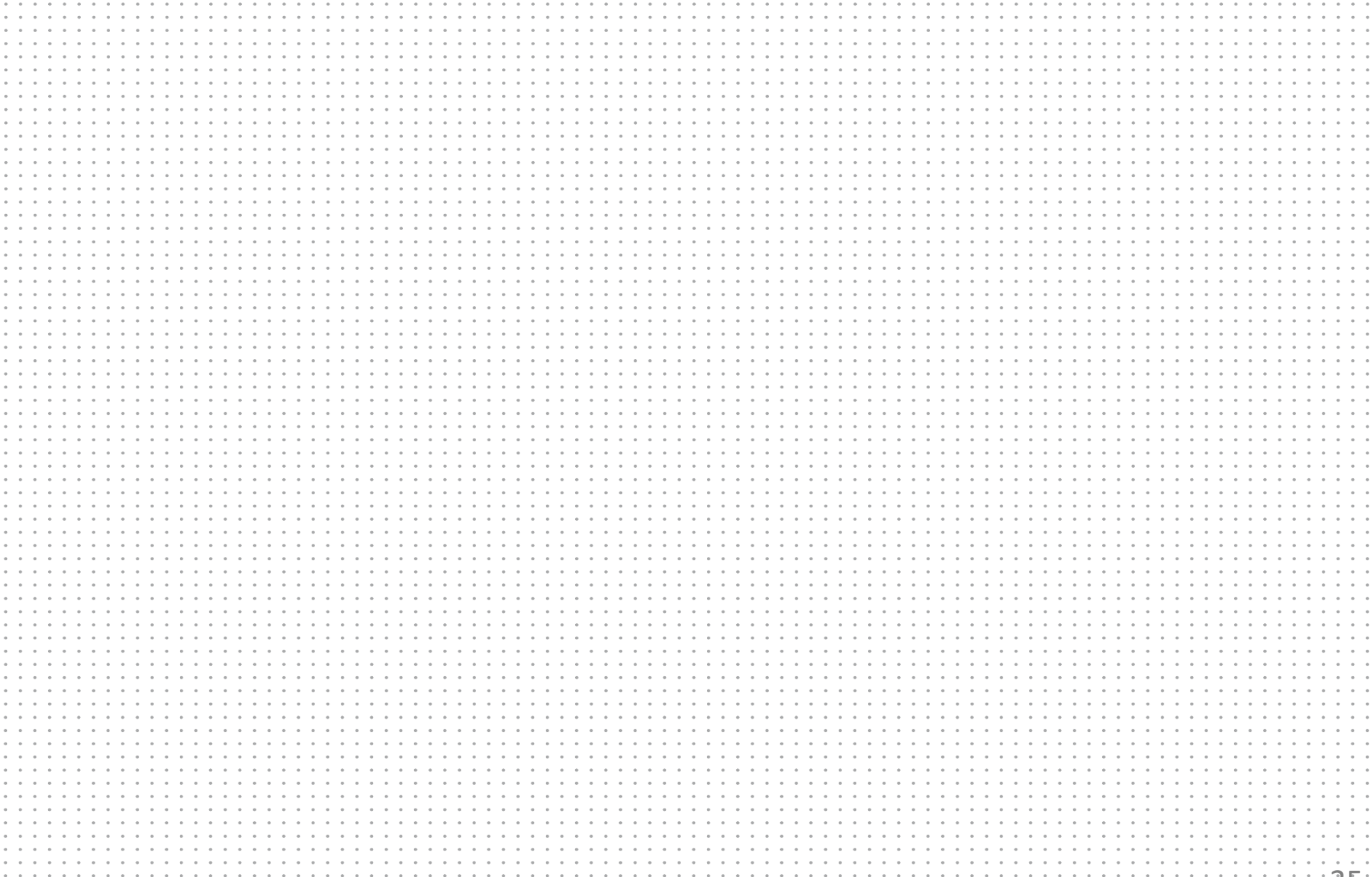
Challenge | My specific challenge is...

Question | My specific question is...

Insights & Actions

Insights & Actions

Insights & Actions







THE UPSELLING MAXIMISER



5 Key Principles

1. Service Not Sales...

2. Plant The Seed...



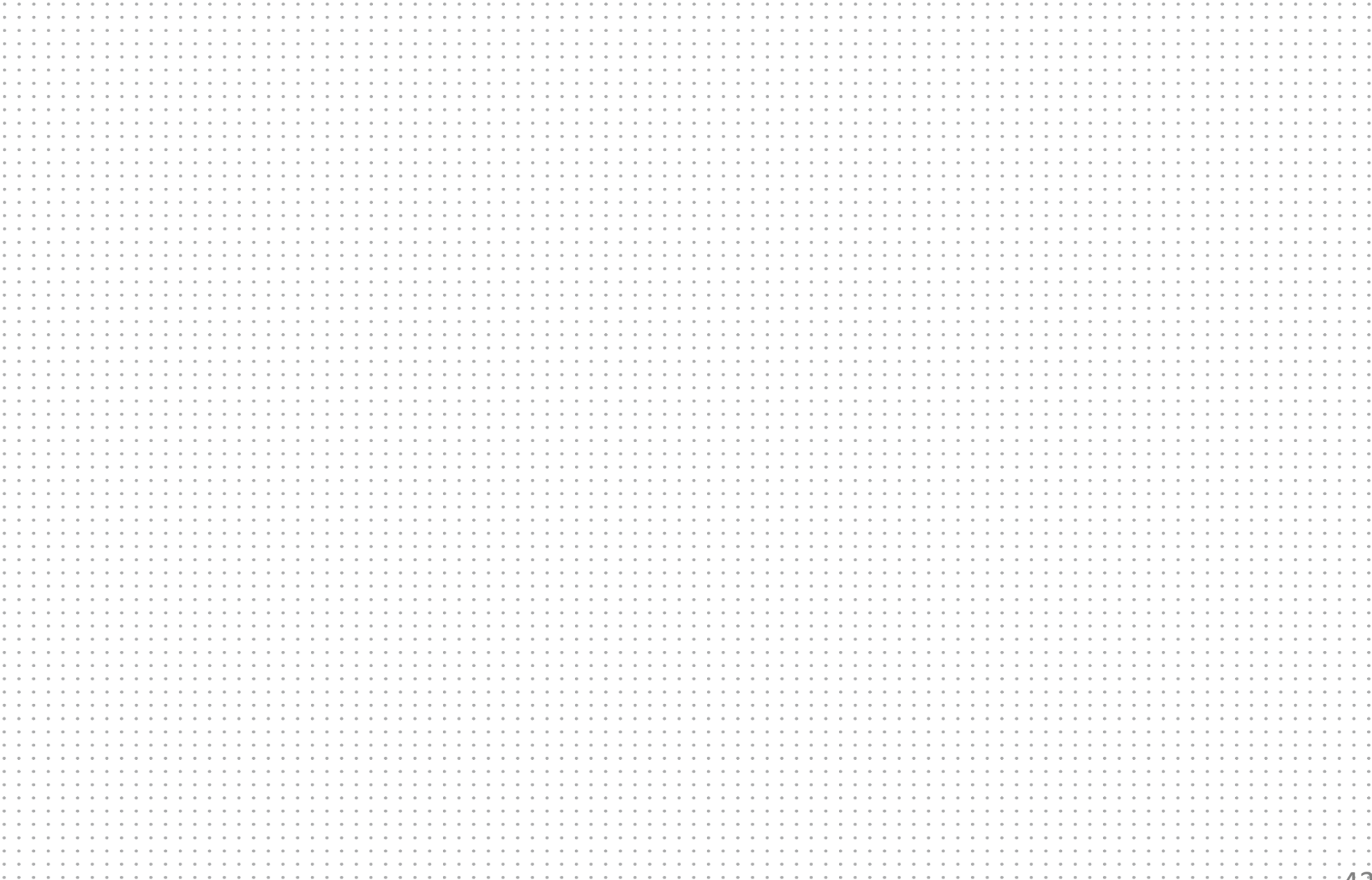
3. Create The Process...



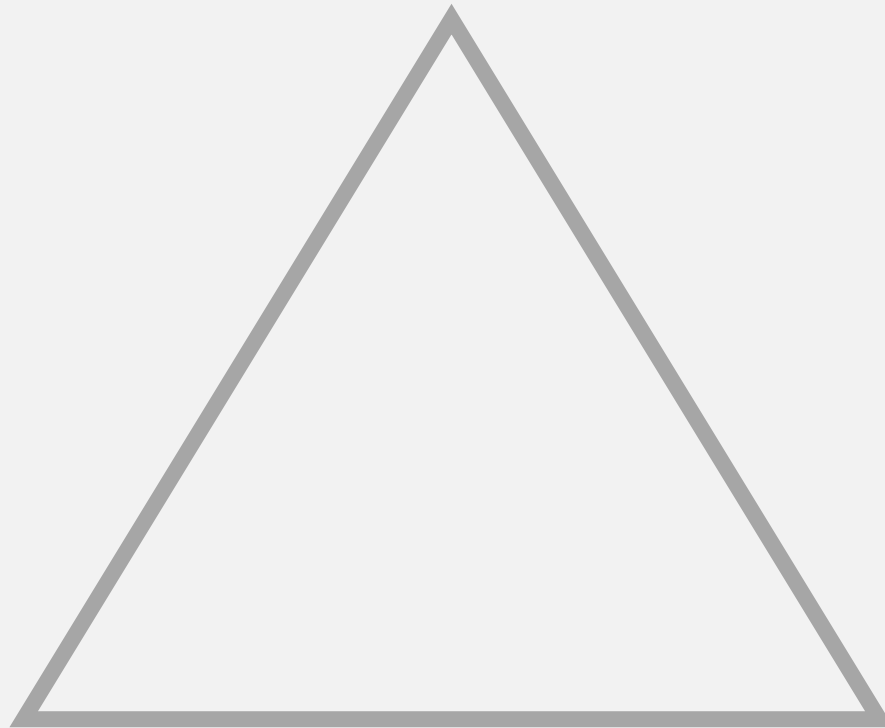
4. Train The Team...

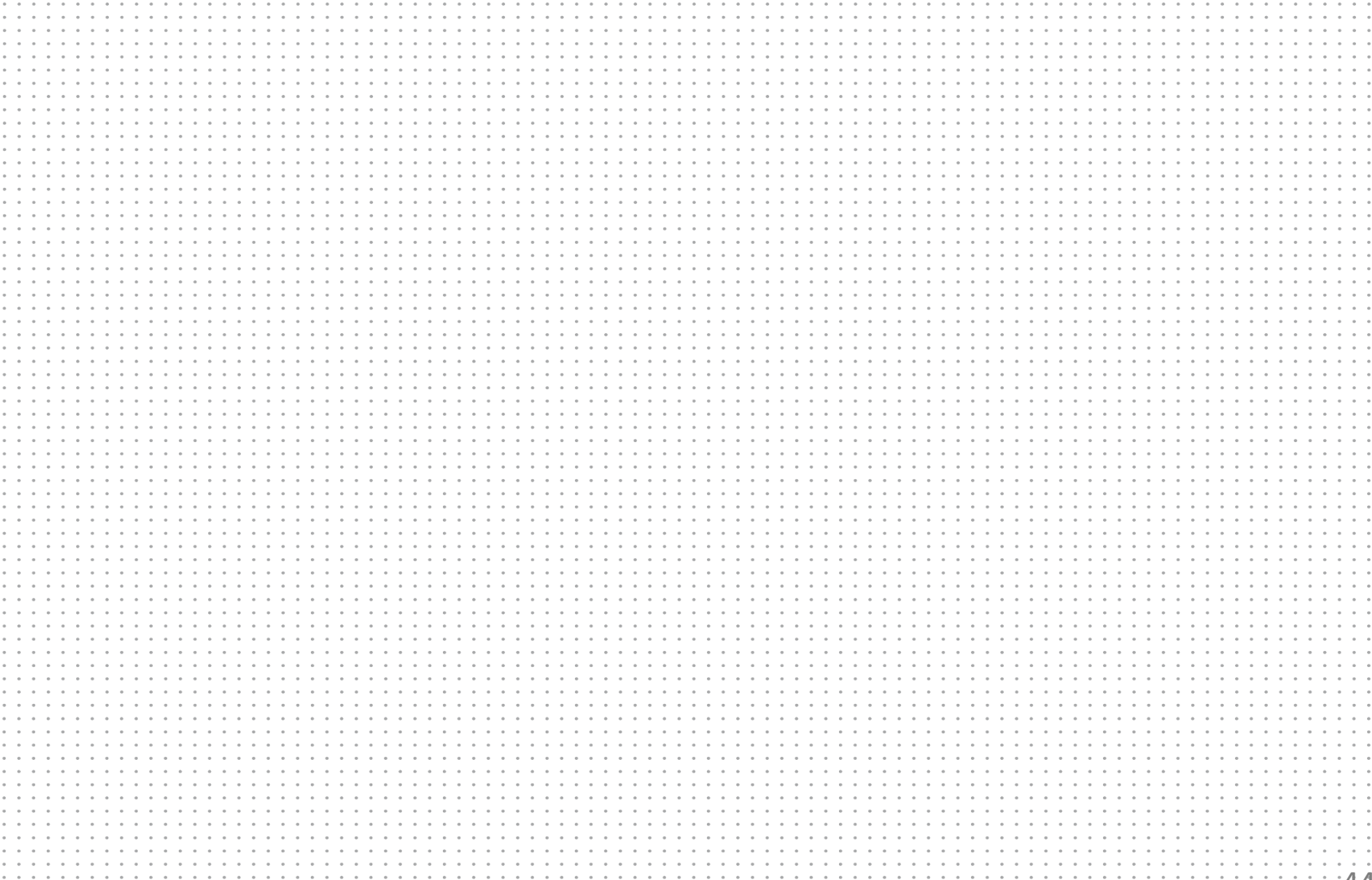


5. Measure The Results...



The 3 P's of Upselling





Enquiry Script Cont...

How can we help you today? (get as many details as possible – including property access details.)

(Check in schedule and book a suitable time for the job or onsite visit (see script for large jobs)

Date: _____ Time: _____ Who: _____ (enter in Job Management System)

Do you own any other properties? Y / N (would you like our director John to contact you and discuss our VIP program for Property Investors?) Y / N

(name) as part of our service the team will also conduct a Free XX Point (Plumbing / Electrical) safety inspection whilst on site.

So (name) our service fee is \$150 Incl. GST. That covers us getting to site, the first 30 minutes of labour, doesn't include any materials and we take payment on completion. (Discuss other fees as appropriate e.g. Urgent / After Hours call out)

Are you ok with that?

(If not an Account Holder) How would you like to pay for the job?

You can pay via Credit Card or Open an Account and pay by internet banking.

What would work best for you?

NOTES

Enquiry Script Cont...

To secure your booking we'll grab a copy of your credit card details. We'll send you an invoice once the job is completed. If we don't hear from you or receive payment via internet banking, we'll process payment on the credit card the following day.

Are you ok with that?

Visa / Mastercard #

Name on Card

Expiry Date ____ / ____

CSV _____

If opening an account... *Cool, we'll send you a copy of our terms and conditions via email now. Please sign the terms online to confirm your job. Is that OK?*

If a job that requires a site / sales appointment...

The next step is to schedule an onsite meeting with our Estimator (name). (Name) has some time available on _____ or _____ (give two options for the client to choose from that fit with default diary). What time works best for you?

(Name) will give you a call prior to coming to ask you a few more details about what you're after so he's prepared.

I am going to send you out an information pack and a questionnaire, what is the best address to send it to (Name)? I'll also email the questionnaire and confirmation of appointment, is (address given) the best one to send that to?

Thanks, (Name) will give you a call once we have received your questionnaire to discuss your project further. What is the best number to contact you on?

Close...

Great (name of Tradesman/ Estimator) will see you at (time) on (date) at (address).

Is there anything else we can help you with?

Have a great day☺

NOTES



Script for Booking Service Work

Good morning/ Afternoon...Can I speak with (name) please?

It's (your name) from XYZ Plumbers, how are you today?

(name) the reason for calling is our records show you have a _____ (gas heater etc.) that's due for a service.

(name)one of our technicians has time available next Monday or Tuesday (or whatever day you choose) and will be in your area, which day would work better for you?

Arrange details with client.

On Monday we have 10am 4.30pm. (organise a time)

Awesome (name) one of our technicians will be at your house (say address to confirm) on Monday at 10am to service your _____ (gas heater etc). Do you have any other gas appliances that you would like us to inspect while we are there?

Frequently asked questions

1. How much will it cost me? (Give the price for service and explain it will cost more depending if it needs repair, any small repairs we will fix on the day. *If it needs replacing or we will confirm with you before we undertake the work, is that ok with you?)*
2. Do I have to be there? *Yes...somebody will need to be there to let me in your house.*
3. How long will it take? *Give answer 😊*

This script works well because it uses a presumptive close (assumes they will say yes)

NOTES



Plumbing Inspection Checklist

Plumbing Inspection Checklist for XYZ Plumbing Ltd

Client Name: Plumber:

Client Address: Job #:

Phone No.: Date:

1. Toby Location (please note so owners is aware in case of emergency)

2. Water Main

Type.....

Condition (circle) Needs Repair Average Good

3. Hot Water System

Type..... Age (approx.).....

Condition (circle) Needs Repair Average Good

Estimate Life Span (circle) Less than 6 months 6 months to 12 months 12 Months plus

Is there a tempering valve? Y/N

4. Tap Ware

Leaks? Y / N Where?

Stiff Loose Taps? Y / N Where?

Mixer required? Y / N Where?

5. Water Leaks (Check for slow leaks)

Kitchen... Y / N Laundry Y / N

Bathroom... Y / N Toilet Y / N

6. Roof (Visual Inspection only)

Spouting/ Gutter Needs repair Average Good

What needs repairing:.....

Roof Condition Needs inspection Average Good

What needs inspecting:.....

Down Pipes Needs repair Average Good

What needs repairing:.....

7. Drains

Drains clear? Y / N

What needs attention:.....

8. Ventilation

Range Hood ventilates to exterior Y / N

Bathroom fan ventilates to exterior Y / N

9. Gas

Does the property have gas? Y / N

Gas Appliances

Water Heater Make.....Model.....Need Servicing Y / N

Hob Make.....Model.....Need Servicing Y / N

Oven Make.....Model.....Need Servicing Y / N

Heater Make.....Model.....Need Servicing Y / N

Electrical Inspection Checklist

Electrical Inspection Checklist for XYZ Electrical Ltd

Client Name: Electrician:

Client Address: Job #:

Phone No.: Date:

6. Heating and Ventilation

Ventilation Filters Due for Replacement Y / N Ventilation System Required Y / N

Heat Pump Due for Service Y / N Heat Pump Required Y / N

1. Earth Location (please note so owners is aware in case of emergency)

.....

2. Switch Board

Type (Take Photo) RCD's / upgrade / required? Y / N

Condition (circle) Needs Repair Average Good

3. Power Points

Condition (circle) Needs Repair Average Good

Additional Power Points Required? Y / N Upgrade Singles to Doubles? Y / N

4. Lights

Any issues with blown lights? Y / N Upgrade to LED's? Y / N

Security Lights Working Y / N Security Lights Required? Y / N

Additional Lighting Required?

5. Bathrooms

Extractor Fan Working / Required Y / N Heater Working / Required Y / N

Heated Towel Rail Working / Required Y / N Towel Rail / Fan / Timer Y / N



Up-Selling Maximiser Tip Sheet

Introducing the script when you're on-site...

"As part of our service we complete a Free 19 Point Plumbing / Electrical Safety Inspection to check the condition of your Plumbing / Electrical fittings. It'll take about 5 minutes. Is that OK?"

Discussing the result of the checklist with the client...

"Well the good news is that your home (office / factory / etc) passes on 17 of the 19 points of the safety inspection. The only things that you might want to look at are _____ and _____. Would you like me to fix that for you (or organise a quote to get that sorted for you)?"

If they were not on-site, follow-up with a call from the office...

"Hi (name). Jane from XYZ Plumbing / Electrical speaking. How are you today?"

(Tradesmen name) completed the job at your place (this morning / yesterday / whenever). I wanted to give you a quick call to make sure you were happy with everything?

(Tradesmen name) completed a Free Plumbing / Electrical Safety Inspection while he was there to check the condition of your Plumbing / Electrical fittings. Everything was good except he noticed a couple of things that you might like to look at. The _____ and _____...

Would you like us to sort that out for you (organise a quote)?"

Key Performance Indicators for Up-Selling Performance

For Individual Team Members

1. Number of Upsells Attempted (Safety Inspections Completed)
2. Upselling Success rate = $\text{Number of Successful Upsell} / \text{Number of Upsells Attempted} \times 100$

For The Business

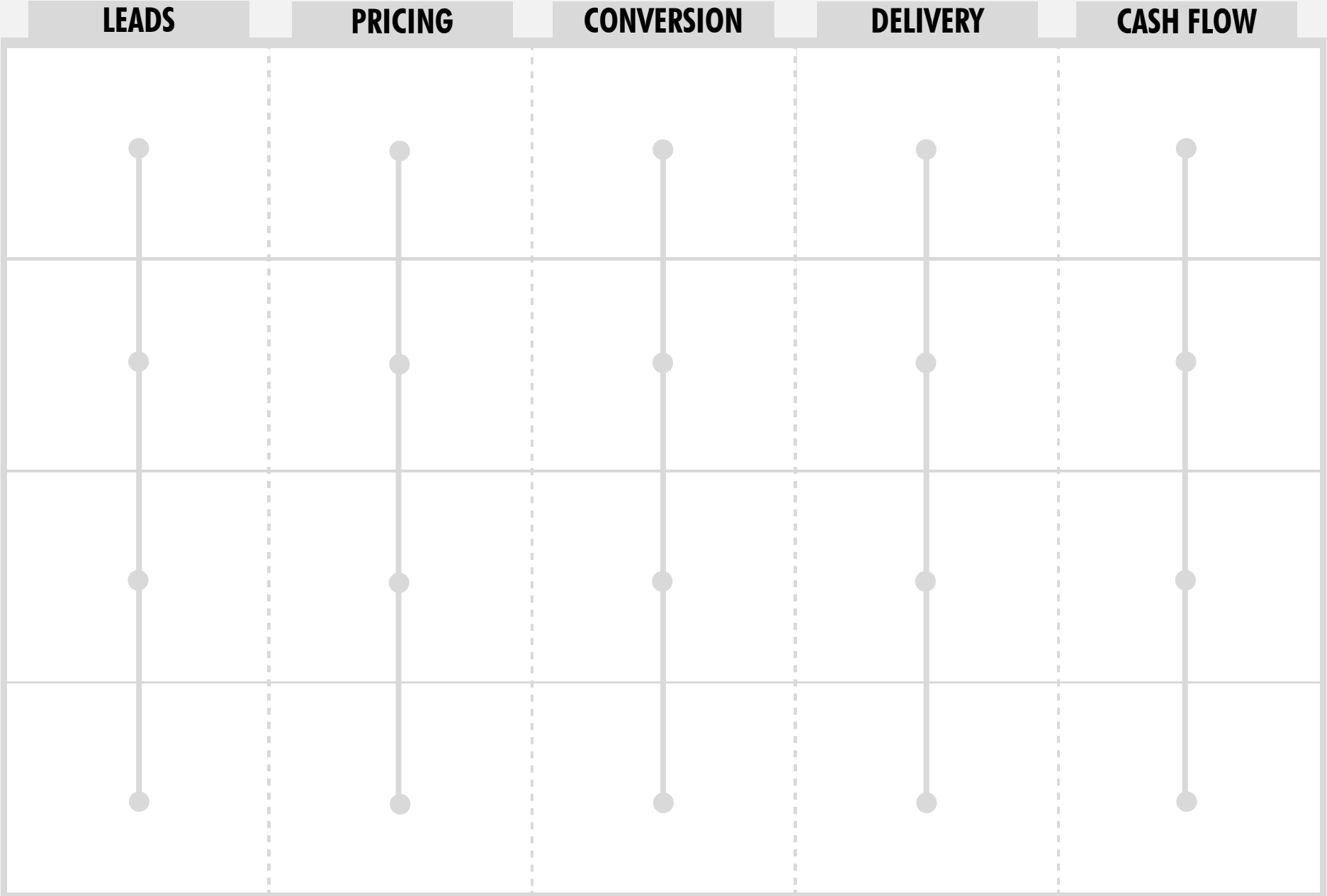
1. How many extra jobs per client per month? (or extra jobs booked per client)
2. What is the Average Sale Value across the business per month?
3. Increase in value of contract (for work requiring quotes)
4. Sales

NOTES



THE BUSINESS BREAKOUT

The 5 Drivers



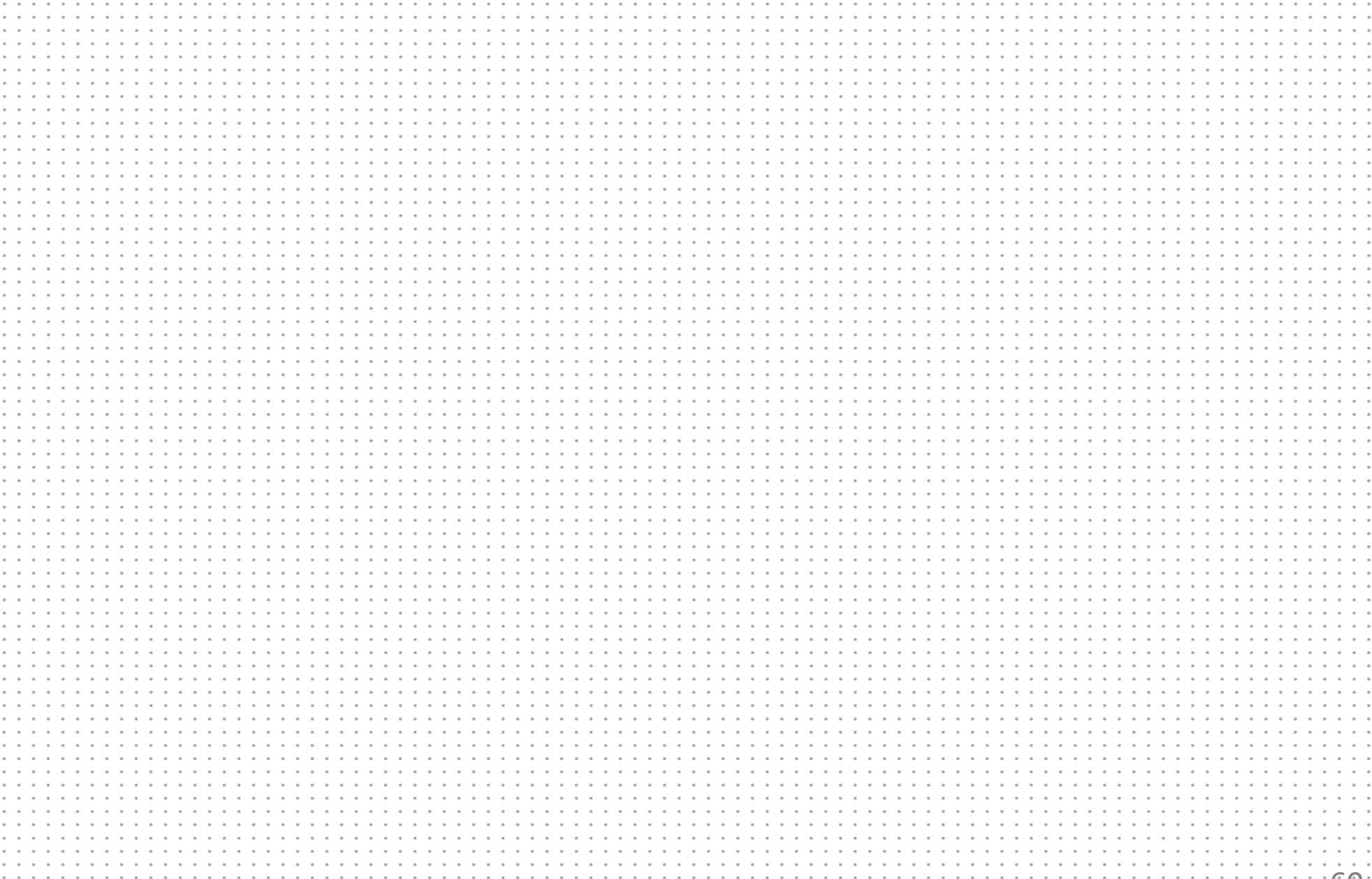
The 5 Drivers Action Plan

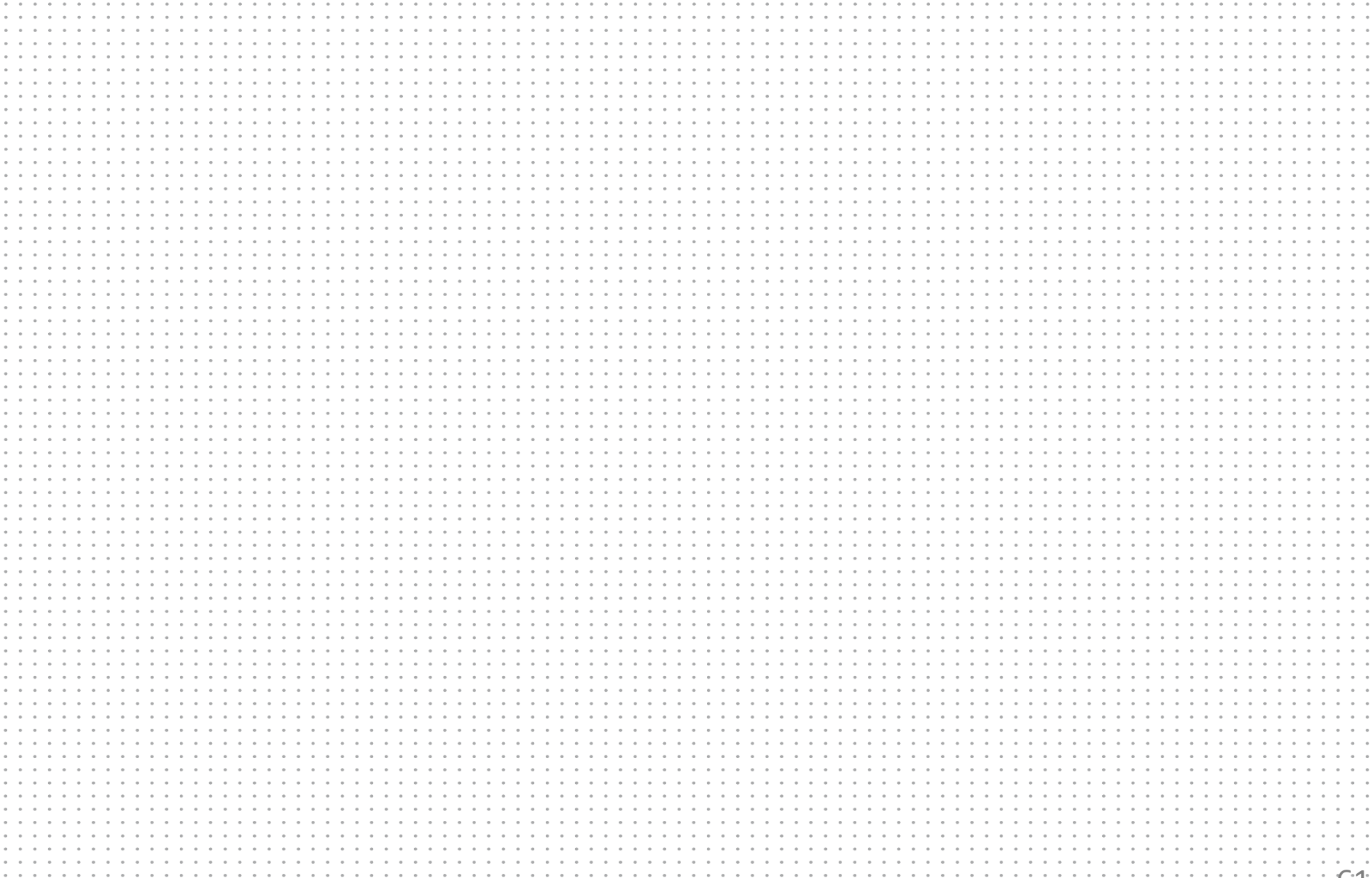
Activities

Projects

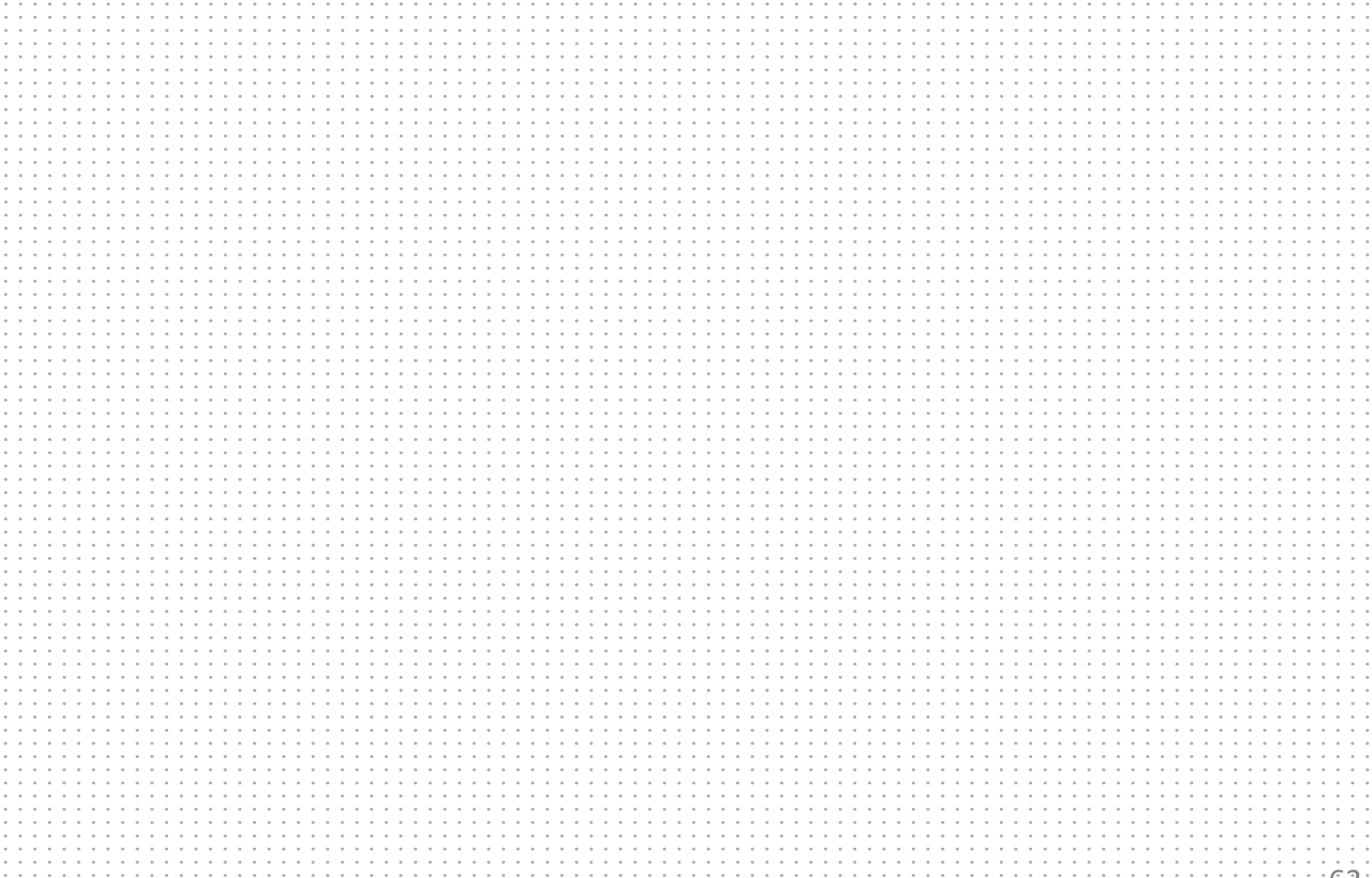
Processes

People



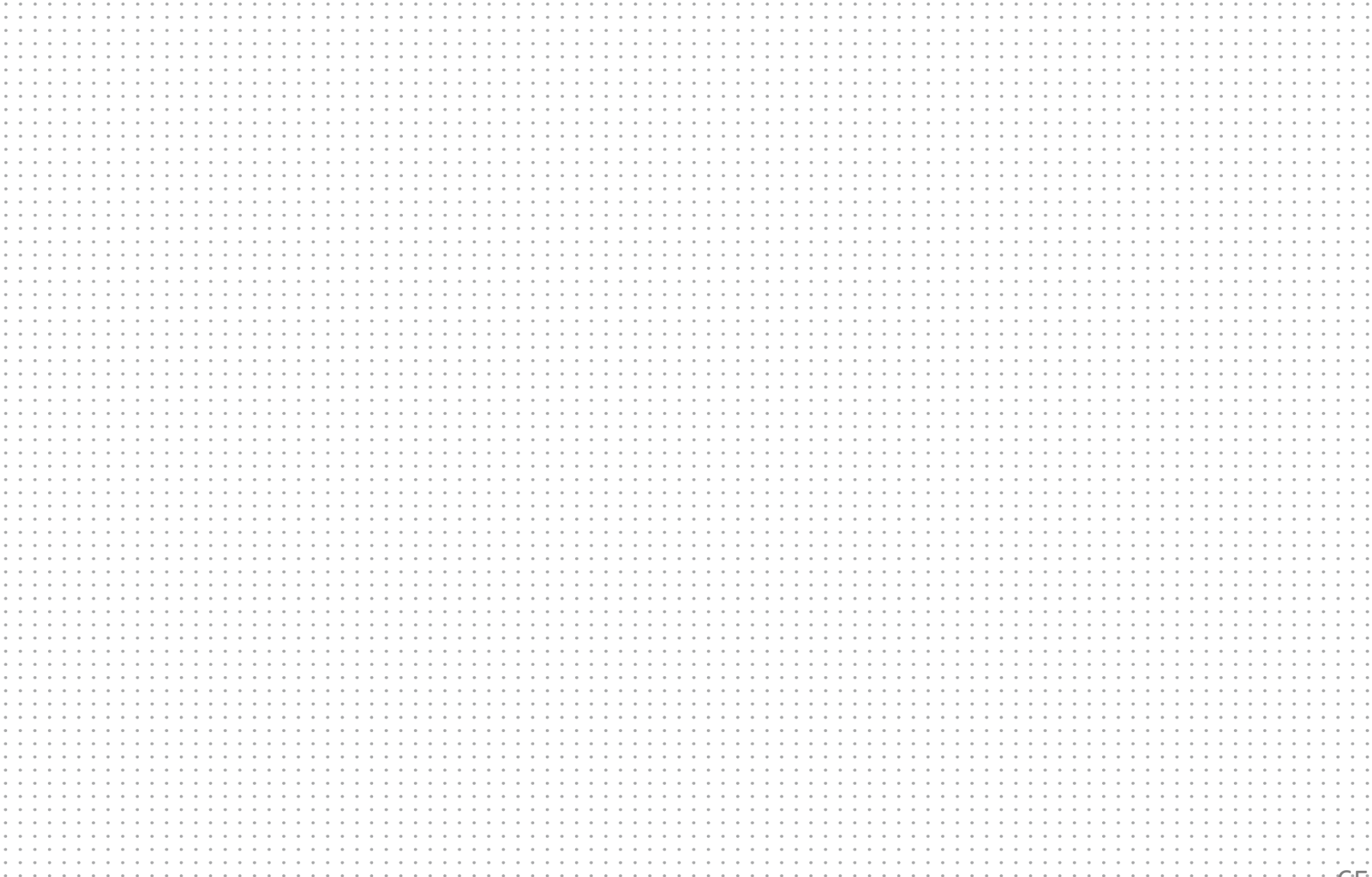


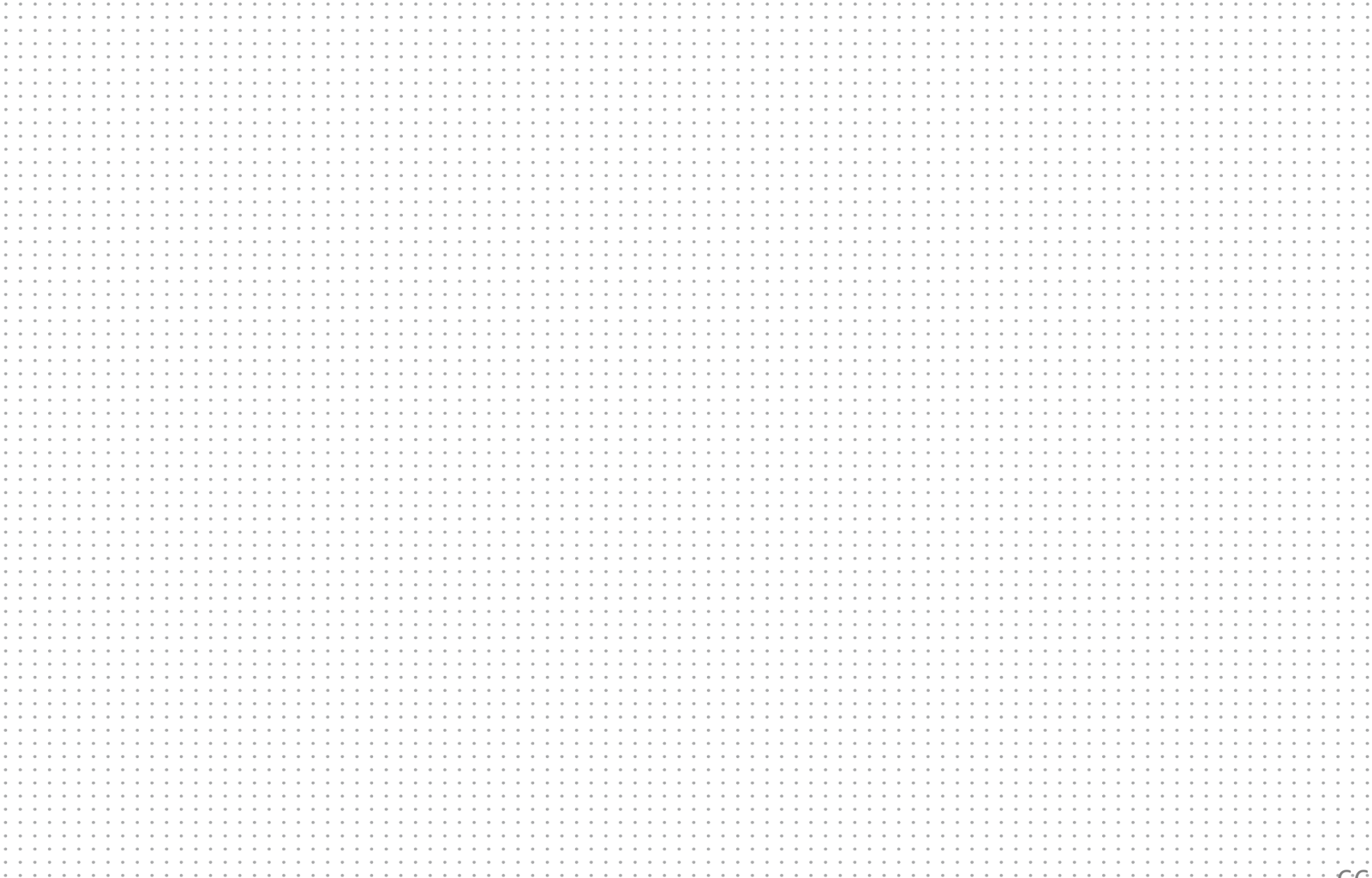




THE META PROJECT

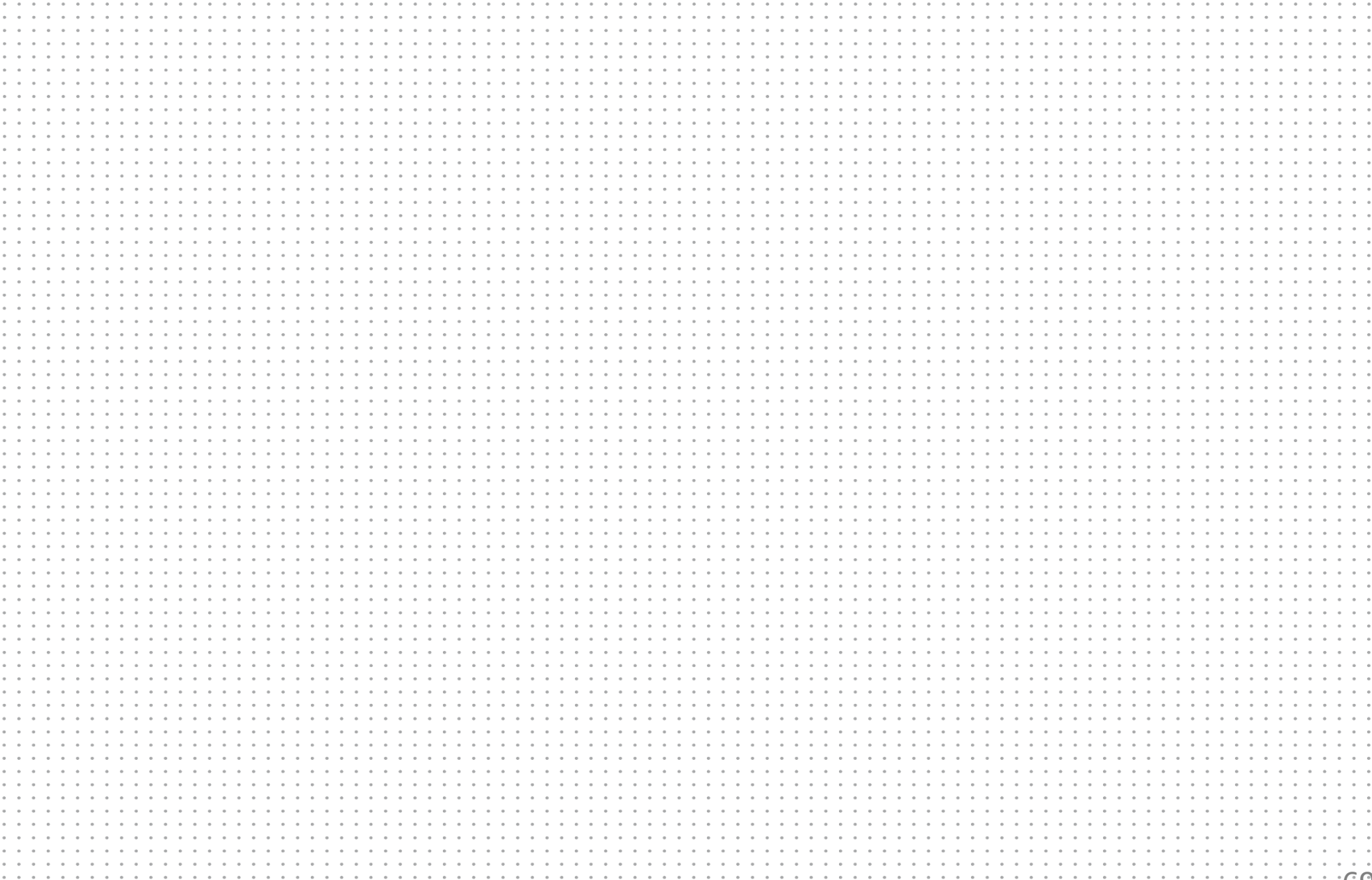
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SPOTLIGHT SESSIONS



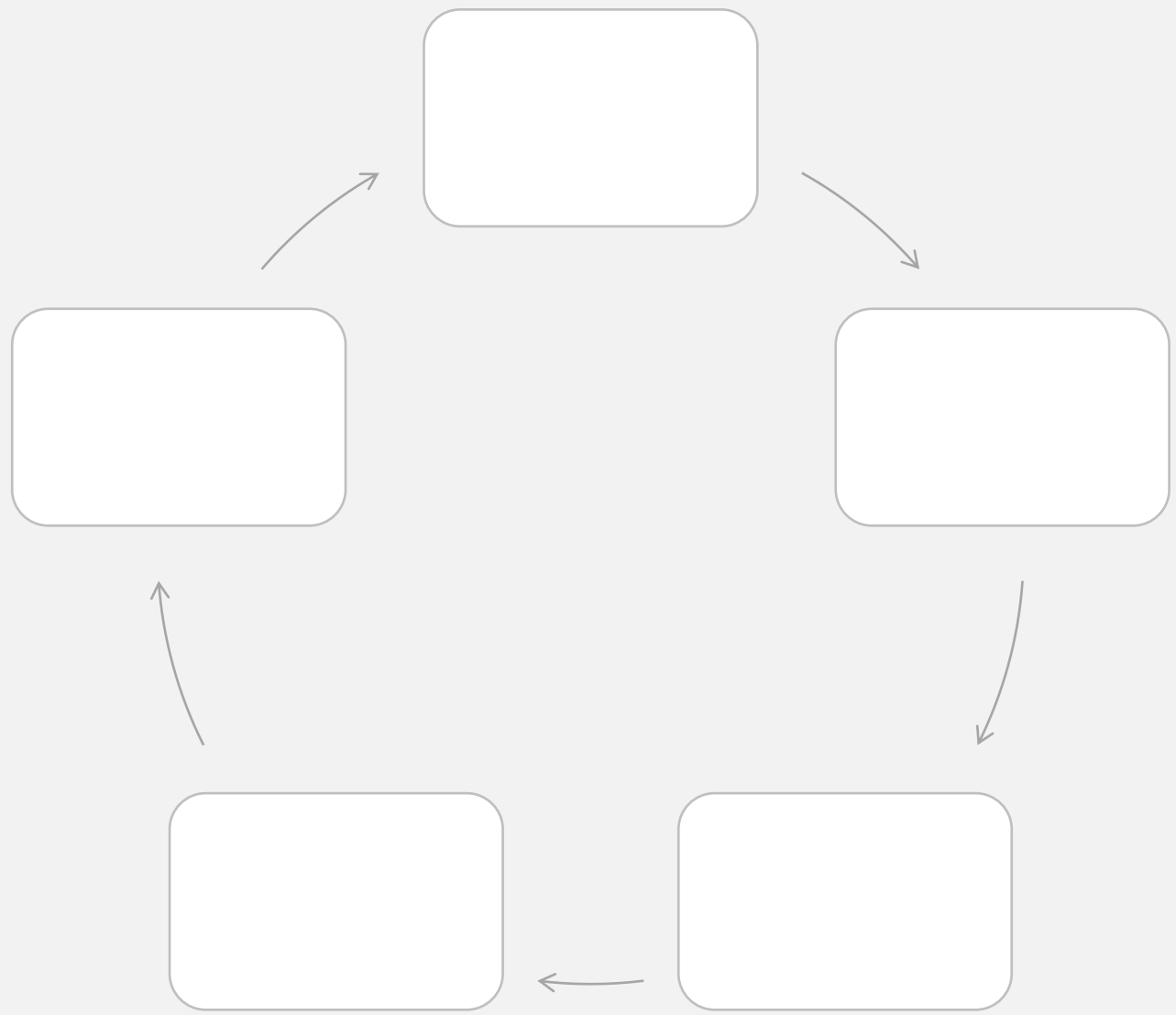




THE 6 WEEK PLANNING SESSION



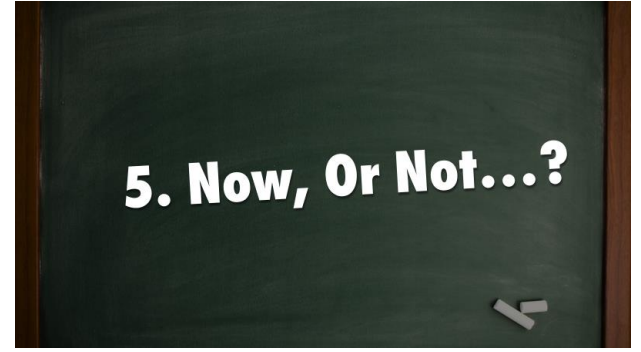
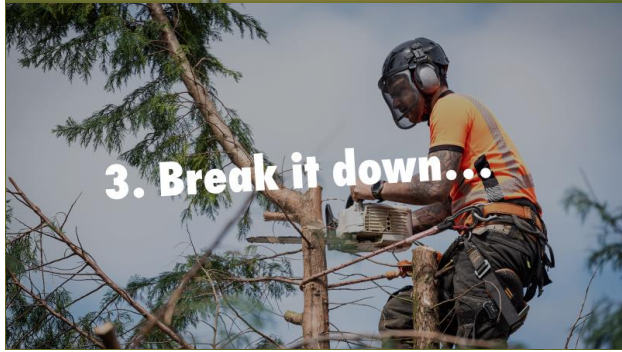
The Planning Cycle



5 Key Principles

1. Start With Strategy...

2. Execute With Tactic...



The 6 Week Advantage

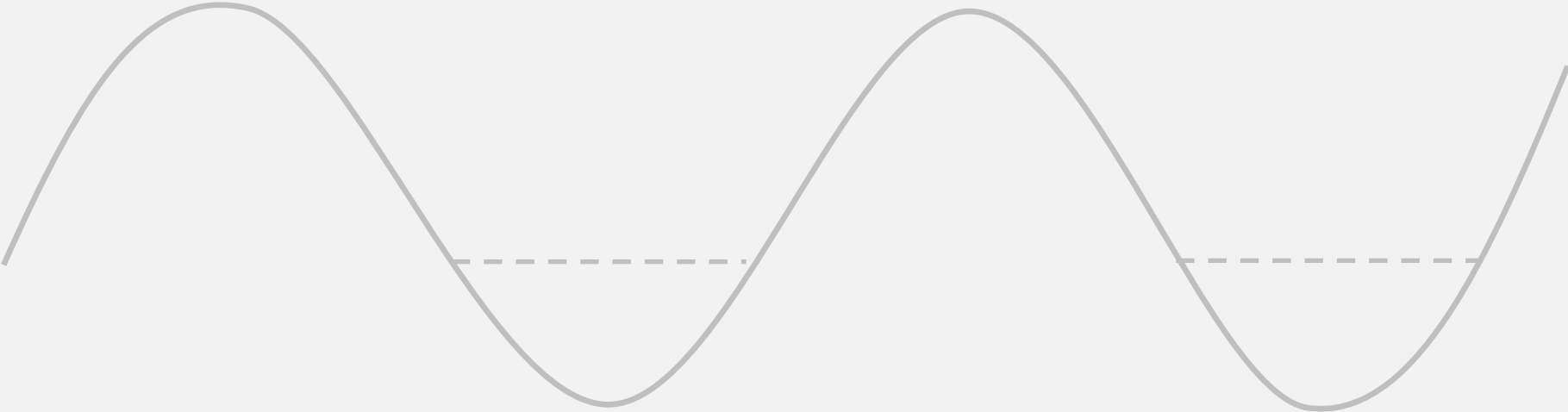
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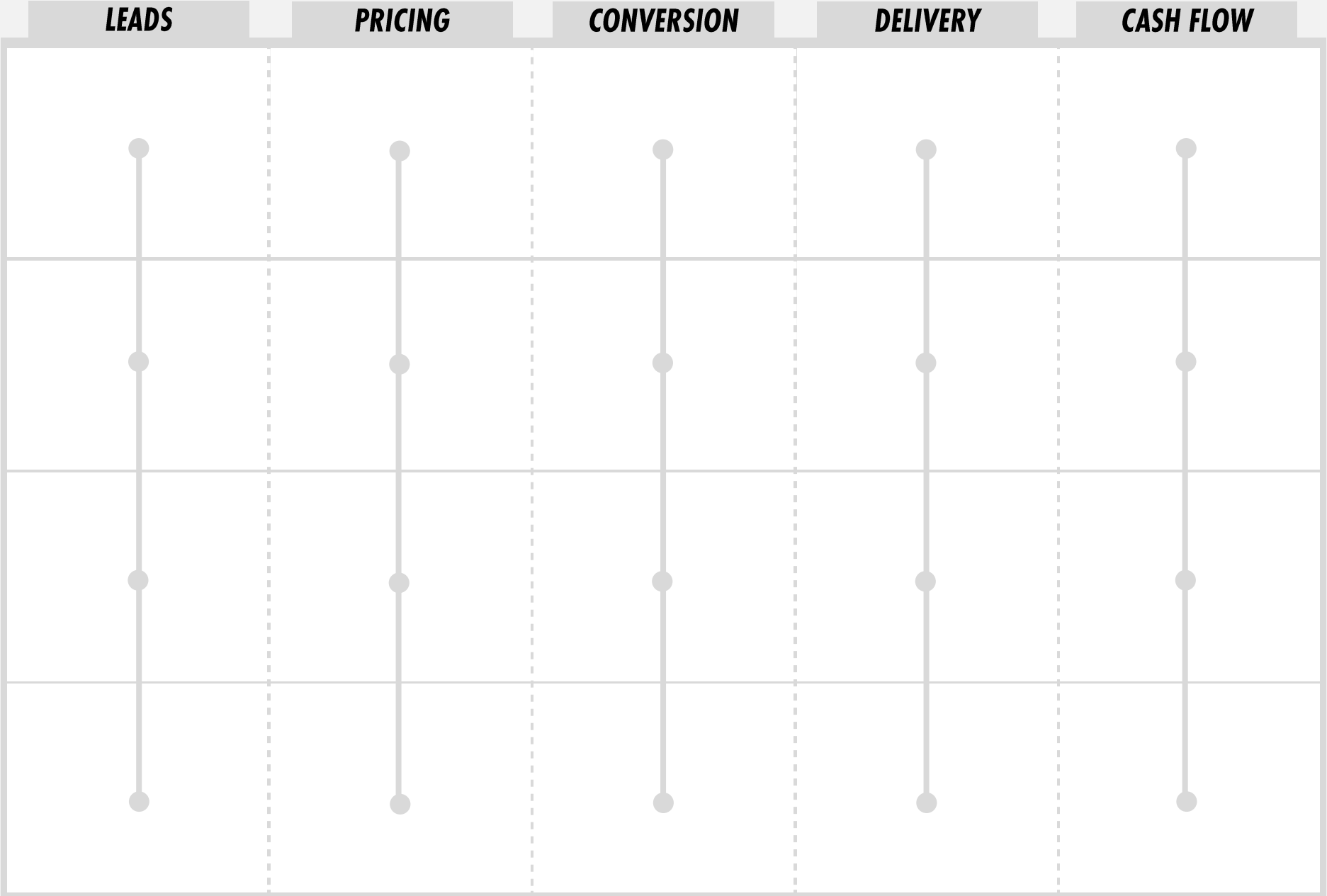
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The 6 Week Cycle



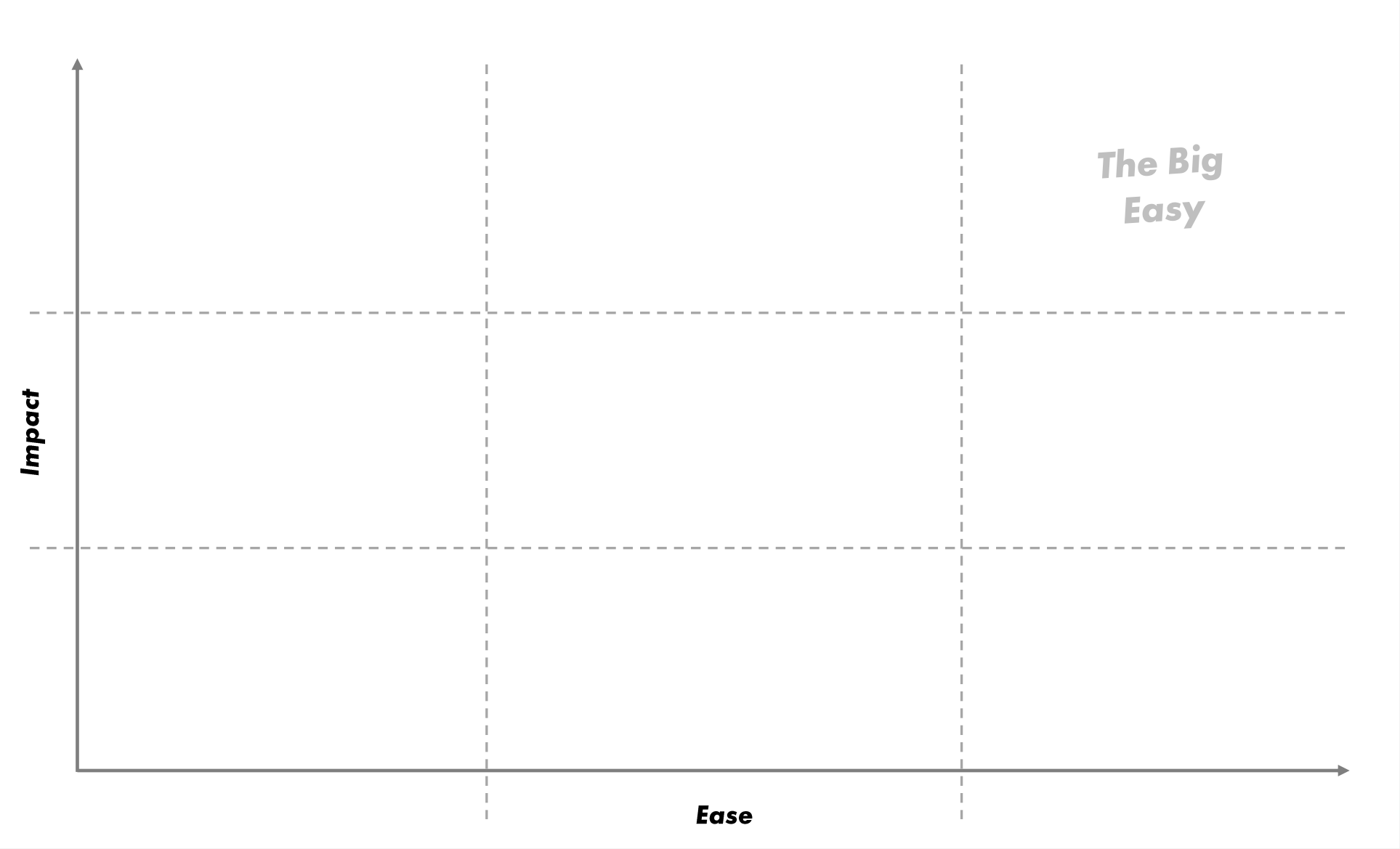
The 5 Drivers



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	Cash Flow Forecasting <input type="checkbox"/>	Design Pre-Job Checklists & Processes <input type="checkbox"/>	Implement the 20 <input type="checkbox"/>	Add another Target Market <input type="checkbox"/>	Company Profile <input type="checkbox"/>	Leadership Training for Owners <input type="checkbox"/>	
	Planning for Profit & Budgets <input type="checkbox"/>	Build Pricing Templates Fixed pricing <input type="checkbox"/>	Employer of Choice Strategy <input type="checkbox"/>	Appoint Marketing Co-Ordinator <input type="checkbox"/>	Hire an Estimator <input type="checkbox"/>	Identify Your Genius Zone <input type="checkbox"/>	
STABILITY \$500K-\$1M	Accounts Receivable Process <input type="checkbox"/>	Administration Manual <input type="checkbox"/>	Core Values <input type="checkbox"/>	Track Marketing Results & ROI <input type="checkbox"/>	Map the Sales Process <input type="checkbox"/>	Complete Vision Book <input type="checkbox"/>	
	Design Monthly KPI's <input type="checkbox"/>	Quality Assurance Checklists <input type="checkbox"/>	Rules of the Game <input type="checkbox"/>	2-3 Marketing Strategies for Target Market <input type="checkbox"/>	Implement Servicing Program <input type="checkbox"/>	Pre-loaded Year <input type="checkbox"/>	
	Implement Profit First <input type="checkbox"/>	Cloud Based File Storage <input type="checkbox"/>	Appoint Office Manager <input type="checkbox"/>	Quick Response Marketing Tools <input type="checkbox"/>	Follow Up Process <input type="checkbox"/>	Create a Stop Doing List <input type="checkbox"/>	
SURVIVAL \$300K-\$500K	Run Monthly Profit and Loss <input type="checkbox"/>	Install Job Management Software <input type="checkbox"/>	Job Descriptions <input type="checkbox"/>	Create Website <input type="checkbox"/>	Enquiry Script <input type="checkbox"/>	Time Productivity Analysis <input type="checkbox"/>	
	Back Cost all Jobs <input type="checkbox"/>	Install Accounting Software <input type="checkbox"/>	Improve Hiring Process <input type="checkbox"/>	Build Social Media Presence <input type="checkbox"/>	Take Deposits <input type="checkbox"/>	Default Diary <input type="checkbox"/>	
	Price for Gross Margin <input type="checkbox"/>	Install Payroll Software <input type="checkbox"/>	Regular Performance Appraisals <input type="checkbox"/>	Build Client Database <input type="checkbox"/>	Upselling Process <input type="checkbox"/>	Audible & Business Books <input type="checkbox"/>	
STARTUP \$0-\$300K	Get Paid Now <input type="checkbox"/>		Attract A Players <input type="checkbox"/>	Decide Target Market <input type="checkbox"/>			
	Fix Payment Terms <input type="checkbox"/>		Create Hiring Process <input type="checkbox"/>	Sharpen Key Message <input type="checkbox"/>			
	Filter Job Enquiries <input type="checkbox"/>		Make Irresistable Offer <input type="checkbox"/>	Choose Marketing Method <input type="checkbox"/>			

The Betting Table



THE IMPACT FILTER

PROJECT NAME: _____ **DUE DATE:** _____

PROBLEM | *What problem are we solving?*

IMPACT | *What difference will it make?*

OUTCOME | *What will the result look like?*

WHAT ARE THE (1-6) BIG STEPS?

WHAT ARE THE (1-3) NEXT ACTIONS TO GET STARTED?

1

2

3

THE IMPACT FILTER

PROJECT NAME: _____ DUE DATE: _____

PROBLEM | *What problem are we solving?*

IMPACT | *What difference will it make?*

OUTCOME | *What will the result look like?*

WHAT ARE THE (1-6) BIG STEPS?

WHAT ARE THE (1-3) NEXT ACTIONS TO GET STARTED?

1

2

3

THE IMPACT FILTER

PROJECT NAME: _____ **DUE DATE:** _____

PROBLEM | *What problem are we solving?*

IMPACT | *What difference will it make?*

OUTCOME | *What will the result look like?*

WHAT ARE THE (1-6) BIG STEPS?

WHAT ARE THE (1-3) NEXT ACTIONS TO GET STARTED?

1

2

3

THE IMPACT FILTER

PROJECT NAME: _____ **DUE DATE:** _____

PROBLEM | *What problem are we solving?*

IMPACT | *What difference will it make?*

OUTCOME | *What will the result look like?*

WHAT ARE THE (1-6) BIG STEPS?

WHAT ARE THE (1-3) NEXT ACTIONS TO GET STARTED?

1

2

3

THE IMPACT FILTER

PROJECT NAME: _____ **DUE DATE:** _____

PROBLEM | *What problem are we solving?*

IMPACT | *What difference will it make?*

OUTCOME | *What will the result look like?*

WHAT ARE THE (1-6) BIG STEPS?

WHAT ARE THE (1-3) NEXT ACTIONS TO GET STARTED?

1

2

3

THE IMPACT FILTER

PROJECT NAME: *Review Pricing Strategy* **DUE DATE:** _____

PROBLEM | What problem are we solving?

Lower profit than we want and inconsistent profits across different jobs

WHAT ARE THE (1-6) BIG STEPS?

Back cost 3 months of jobs to have a solid data set

Set target gross profit margins for all types of work

Create a system for regular pricing reviews

IMPACT | What difference will it make?

Increasing margins will increase profits without adding to overheads

Trend back costing results to find out most and least profitable work

Start charging for everything we do – travel, variations etc

Feel good about charging what we are worth. No more discounting or mates' rates

OUTCOME | What will the result look like?

Consistent improved profitability and cashflow

WHAT ARE THE (1-3) NEXT ACTIONS TO GET STARTED?

1

Back cost jobs for 3 months to establish trend (or go back through last 3 months)

2

Block time in default calendar for weekly back costing review

3

Identify the different types of work which we need targets for

THE IMPACT FILTER

PROBLEM | What problem are we solving?

Under capacity on tools meaning we can't keep up and we are potentially losing clients

IMPACT | What difference will it make?

Give us the ability to get more work done. Increase turnover per month and take the pressure off

OUTCOME | What will the result look like?

Increase turnover = increased profits and more timely service for clients and a happier team

PROJECT NAME: *Hiring Process (Tradesman)* DUE DATE: _____

WHAT ARE THE (1-6) BIG STEPS?

Job ad listed on minimum of 3 platforms

Qualifying criteria used on every prospect

All candidates screened for 'culture fit'

Interview script used with every interview

All potential hires on-job tested

All potential employees reference checked

WHAT ARE THE (1-3) NEXT ACTIONS TO GET STARTED?

1

Create Job Ad

2

List job on Seek, Gum Tree and Facebook

3

Map hiring process, interview questions, on-job test, etc.

THE IMPACT FILTER

PROJECT NAME: *Lumpy Mail* **DUE DATE:** _____

PROBLEM | What problem are we solving?

Need more work from builders to keep growing

IMPACT | What difference will it make?

More work from builders will give us ongoing work and good-sized jobs

OUTCOME | What will the result look like?

Steady flow of repeat work to drive sales, and cash and to support new employees

WHAT ARE THE (1-6) BIG STEPS?

List of minimum 100 prospects identified with emails, phone numbers and addresses

Sales letter finalised with clear offer and call to action

Attention catching 'grabber' (Lumpy Mail included)

Follow up process mapped with scripts and templates

Min 50 packs sent

All packs followed up in line with follow up plan

WHAT ARE THE (1-3) NEXT ACTIONS TO GET STARTED?

1

List created or purchased

2

Sales letter finalised

3

'Lumpy' item chosen and acquired



The Compass

Cycle Begins_____ Cycle Ends_____

Motivation	Carrot	Stick

	Strategy Description	25-Mar	1-Apr	8-Apr	15-Apr	22-Apr	29-Apr	6-May	13-May	Completed?
1										
2										
3										
4										
5										
6										


My Next Belt Level:



\$50k+




\$100k+



\$150k+



\$200k+




\$300k+



\$400k+



\$500k+




\$750k+



\$1M+



\$1.25M+



\$1.5M+



\$2M+

Signed:

Date:



The Traffic Light Check In

* Required



Your Business Name *

Your answer

How are you travelling? *

- ☐ Green - I'm clear and moving forward.
- ☐ Amber - I've slowed down and could use a nudge.
- ☐ Red - I'm stuck and could really use some help.
- ☐ Other: _____

Submit

THE TOOLBOX

Lead Generation

Every business needs a plenty of profitable and good to work with prospective clients to work with. Strong lead flow gives you the ability to price for profit and to make choices about who you work with and don't work with.

	Foundation – do first		Foundation – good idea		Choose as appropriate
Measure Source of Leads Track the effectiveness and return on investment of your marketing. <i>How to Track Your Leads – 10 Minute Tactic</i>	Check Sales Conversion Rates You may have a sales problem rather than a leads problem. <i>How to Track Your Leads – 10 Minute Tactic; Also see the Conversion Section of 5 Drivers</i>	Create a Marketing Plan Create a plan so that you target the right market(s) with the right marketing strategies. <i>How to Create a Marketing Machine – Marketing Webinars</i>			
Create a Unique Selling Proposition (USP) Create a point of difference in your marketplace. <i>How to Create a Unique Selling Proposition – 10 Minute Tactic; Review USP templates on membership site – Marketing Resources</i>	Create a Customer Guarantee <i>Review examples on member websites</i> www.2eelectrical.co.nz ; www.nelsonalarms.co.nz	Update Website Create an authority website that shows how professional your business is. <i>Websites that Convert – Marketing Webinars; Authority Architecture - Module 2 Marketing Bootcamp 2018; Review Example Websites</i> www.2eelectrical.co.nz www.nelsonalarms.co.nz www.jasonbrownplumbing.co.nz www.easwaikato.co.nz www.sharpplumbingservices.co.nz			
Set Up Facebook Business Page Set up a business Facebook page and create a content plan. <i>Fishing on Facebook – Marketing Bootcamp 2018</i>	LinkedIn Marketing Create a LinkedIn profile and market directly to potential clients (Builders, Property Managers, etc) <i>LinkedIn: How to Tap the Hidden Goldmine – Marketing Webinars</i>	Compile a Customer Database Create a list of client emails and/or mobile numbers for future marketing. <i>Marketing to Existing Clients – Marketing Webinars; The Email Accelerator – Marketing Webinars; Ask on the Facebook Group</i>			
Direct (Lumpy) Mail Send lumpy mail packs to prospective business to business clients (Builders, Property Managers, Real Estate, Architects etc.) <i>Marketing Business to Business – Marketing Webinars; Ask on the Facebook Group</i>	Instagram Marketing Set up an Instagram page and create a strategy for connecting with potential business to business clients. <i>Building Business on Instagram – Virtual Bootcamp July 2020</i>	Send a Regular Newsletter Send a regular newsletter to your database. <i>The Prospect Nurture System – Marketing Webinars, Marketing to Your Existing Clients and Prospects – Marketing Webinars</i>			

Lead Generation

Council Consents Lists Sign up to receive a list of consents coming from Council. <i>Ask on the Facebook Group</i>	List in online directories (e.g., No Cowboys, Gum Tree, Yellow Pages, Trade Me, eBay, Craigs List etc.) <i>Ask on the Facebook Group</i>	Distribute a Flyer Campaign Design and send flyers around the local area. <i>The Flyer Blueprint – Marketing Webinars</i>
Email Marketing to Your Database Create email offers that generate work quickly. <i>The Email Accelerator – Marketing Webinars</i>	Join a Networking Group (e.g., BNI) Join a networking group to generate referral business in your local community. <i>Ask on the Facebook Group</i>	Grow Facebook Following with Competitions Run competitions and giveaways on Facebook to grow your followers. <i>Spotlight How to Create a Facebook Following – Business of Business Bootcamp 2019</i>
Hire a Marketing Assistant Many business owners don't have the time to dedicate to marketing – get some help. <i>How to Hire the Right Staff – Team Webinars; How to Hire a Marketing Student – 10 Minute Tactic</i>	Run Paid Facebook Ads Create a compelling offer using copy templates and boost the ad to selected audiences. <i>The Facebook Lead Machine – November Bootcamp 2019</i>	Create an Upsell Checklist Teach your team to upsell when onsite to generate more work per client and provide better customer service. <i>The Upselling Maximiser – Sales Webinars</i>
Run Ad Words Campaign Drive website traffic and specific web offers using Google AdWords. <i>Josh Moore from Duoplus – Module 6 Marketing Bootcamp 2018; Ask on the Facebook Group</i>	Yellow Pages Directory List your business in the Yellow Pages Directory. <i>Review Yellow Pages – Marketing Resources</i>	Create a Company Profile Create a company profile, position yourself as a market leader and stand out from the crowd. <i>The Company Profile – Sales Webinars</i>
Search Engine Optimisation (SEO) Get your business ranking high on google search results. <i>How to Get the Most from SEO – 10 Minute Tactic; Ask for providers on the Facebook Group</i>	Run Lead Generation Magnets Create offers to secure potential client email address and details for follow up marketing. <i>Ask on the Facebook Group</i>	Create a Servicing Program Create a system for locking in repeat servicing work, guaranteed. <i>Ask on the Facebook Group</i>
Upgrade Site Signage Create signage that grabs attention and delivers jobs. <i>Mastering Offline Marketing – Marketing Webinars, Ask on the Facebook Group</i>	Get Testimonials (Video and Written) Capture both written and video testimonials to build trust and authority with potential clients. <i>Review Getting Testimonials Guide – Marketing Resources; Ask on the Facebook Group</i>	Create a Referral System Create a referral system to turn “word of mouth” into an actual strategy. <i>Referral Marketing with Michael Griffiths – Marketing Webinars</i>

Lead Generation

Upgrade Vehicle Signage Create signage that grabs attention and delivers jobs. <i>Mastering Offline Marketing – Marketing Webinars, Ask in the Facebook Group</i>	Create a Prospect Nurture System Create a system to nurture prospects from cold through to buyers. Very effective for business-to-business marketing. <i>The Prospect Nurture System – Marketing Webinars</i>	Target work through Property Managers Create a marketing strategy that specifically targets property managers. <i>Win Work with Property Managers – Marketing Webinars; The Prospect Nurture System – Marketing Webinars</i>
Upgrade Building Signage Create signage that grabs attention and delivers jobs. <i>Mastering Offline Marketing – Marketing Webinars, Ask in the Facebook Group</i>	Get Online Reviews Build credibility by developing a system to get positive online reviews (e.g., Google, Facebook, etc.) <i>Ask on the Facebook Group</i>	

Pricing

You must have good margin in your jobs when you price them, get the jobs priced quickly and accurately. It's also crucial that you have a thorough understanding of how your business is running from a numbers point of view. Understanding your financial numbers will feedback into your pricing.

	Foundation – do first		Foundation – good idea		Choose as appropriate
Monthly Profit and Loss Statement Set up your profit and loss so you can track your financial performance. <i>Mastering the Profit and Loss Statement – Financials Webinars; Know Your Numbers - The Nuts and Bolts – Financial Webinars (it's an oldie but a goodie – ignore the part about KPIs at the end)</i>		Monthly Key Performance Indicators Complete your monthly KPIs and send through to the Profitable Tradie team <i>How to Fill Out Your KPI Sheet – 10 Minute Tactic; Planning for Profit – 10 Minute Tactic</i>		Price for Margin and Profit Set pricing targets for your jobs rather than just putting a mark-up and hoping for the best. <i>The Profit Maximiser – Financials Webinars; The Margin Masters – Financials Webinars; Pricing for Profit – Module 6 Numbers Bootcamp 2017</i>	
Back Costing Review the profitability of each job to see how profitable your jobs are and what needs improving. <i>Mastering Back Costing – Module 4 Virtual Bootcamp November 2021</i> <i>How to Back Cost Effectively – 10 Minute Tactic</i>		Implement or Upgrade Job Management Software Implement or upgrade your job management software. <i>The Right Systems for Your Trades Business – Systems Webinars; Facebook Units “I have Job Management Software Questions”</i>		Implement or Upgrade Accounting Software Implement Xero, MYOB or Quickbooks and leave complicated spreadsheets in the past. <i>Ask on the Facebook Group</i>	
Get Paid What You're Worth Improve your money mindset and learn how to get paid what you are worth. <i>Get Paid What You're Worth – Virtual Bootcamp July 2020</i>		Review Pricing Strategy Review your pricing to determine where increases can and should be made. <i>The Profit Maximiser – Financials Webinars; Get Paid What You're Worth – Virtual Bootcamp July 2020</i>		Planning for Profit Calculate targets to aim for along with KPI measurement that result in ACTUALLY making healthy profits. <i>Set Targets – Module 2 Numbers Bootcamp November 2018; Planning for Profit – 10 Minute Tactic</i>	
Pay Myself a Fair Market Salary Pay yourself a fair market salary so you understand the true operating profit from your business. <i>Facebook Units “Why Take a Fair Market Salary?”</i>		Create Sales & Expenses Budget Plan full year budget so you have clear targets to assess your P & L against <i>Module 2 Set Targets – Numbers Bootcamp 2018</i>		Create Pricing Templates/Pre-Built Prices Create pricing templates for larger jobs to improve the speed and accuracy and margins of quoting. <i>Systemise your Pricing – Business of Business Bootcamp 2019</i>	

Pricing

Measure Work in Progress Calculate your work in progress to ensure you have an accurate monthly gross profit. <i>Module 5 Telling the Story – Numbers Bootcamp 2018</i>	Hire/Appoint a Pricing Assistant Promote or hire someone to help with pricing more simple jobs and/or doing the leg work on larger jobs. <i>How to Hire the Right Staff – Team Webinars; Module 5 The Right Seats – Team Bootcamp 2017; The Hiring Masters – Team Webinars</i>	Hire an Estimator Delegate pricing to an Estimator to ensure pricing gets down quickly. <i>How to Hire the Right Staff – Team Webinars; Module 5 The Right Seats – Team Bootcamp 2017; The Hiring Masters – Team Webinars</i>
Use Takeoff Software Implement software to help with ease and accuracy of quoting and project planning. <i>Systemise and Automate with Groundplan – Virtual Bootcamp July 2020</i>	Create Fixed Pricing for Service Work Create fixed pricing templates (price book) for servicing work. <i>Fixed Pricing with Doug Brennan – Financial Webinars</i>	Implement Profit First Follow Mike Michailovich's proven cash budgeting system to ensure you make healthy profits year on year. <i>Profit First with Mike Michalowicz – Financials Webinars</i>
Calculate Break-Even Calculate the break-even sales point for your business. <i>How to Calculate Break-Even – Financial Webinars</i>	Complete Regular Stocktakes Regularly measure stock holding to calculate true materials expenses and get clear on margins. <i>The Right Systems for Your Trades Business – Systems Webinars; Facebook Units "I'm looking for Tips and Tricks that may be useful"; Brad Martin, Tradesman to Businessman – Leadership Webinars</i>	Create Van Stock Template Create a van stock template and complete regular van stock takes. <i>The Right Systems for Your Trades Business – Systems Webinars; Facebook Units "I'm looking for Tips and Tricks that may be useful"; Brad Martin, Tradesman to Businessman – Leadership Webinars</i>
Create Workshop Stock Template Create a workshop stock template and complete regular workshop stock takes. <i>The Right Systems for Your Trades Business – Systems Webinars; Facebook Units "I'm looking for Tips and Tricks that may be useful"; Brad Martin, Tradesman to Businessman – Leadership Webinars</i>	Implement GPS in Vans Implement GPS systems in your vans to track travel and time on site. <i>The Right Systems for Your Trades Business – Systems Webinars; Facebook Units "I'm looking for Tips and Tricks that may be useful"</i>	Upgrade Your Financial KPIs Implement more KPI measures to assess business performance in greater details (e.g., weekly labour utilisation, conversion rates by market, etc). <i>KPI Selector – Financial Resources; Ask on the Facebook Group</i>

Conversion

Once a business is attracting a healthy amount of profitable leads, it's crucial to focus on converting as many as possible into paying jobs. Often, we may think we need to do more marketing, when in reality we just need to close more of the leads we are already getting.

	Foundation – do first		Foundation – good idea		Choose as appropriate
	Upgrade My Sales Mindset Upgrade my thinking around sales and become a more confident and skilled at sales. <i>Module 1 Sales Psychology – Sales Bootcamp 2018</i>		Map Sales Process Steps Map out your sales process to get clarity around what steps you have, and what steps you need to create. <i>How to Own the Sales Meeting Like a Boss – Sales Webinars; The Follow Up – Sales Webinars (reviews the sales process in first part of webinar)</i>		Implement Enquiry Script Use an enquiry script to qualify leads, pre-frame sales steps and payment terms. <i>Module 2 First Impressions – Sales Bootcamp 2018</i>
	Check Sales Conversion Rates You may have a sales problem rather than a leads problem. <i>How to Track Your Leads – 10 Minute Tactic</i>		Get Paid What You're Worth Master the art of getting paid better margins, from pricing to your sales process. <i>How to Get Paid What You're Worth – Virtual Bootcamp July 2020</i>		Follow Up Process for Quotes Create a follow up process for quotes. <i>The Follow Up – Sales Webinars</i>
	Prospect Nurture System Create an ongoing follow-up system for potential business customers. <i>The Prospect Nurture System – Marketing Webinars</i>		Implement a Triage Call For larger jobs use a triage call to qualify leads, pre-frame sales steps and payment terms prior to the site visit. <i>Module 5 Triage – Sales Bootcamp 2018</i>		Create a Company Profile Create a company profile, position yourself as a market leader and stand out from the crowd. <i>The Company Profile – Sales Webinars</i>
	Implement Residential Sales Scripts Create a process and script for your sales meeting to give you the best chance of closing the job. <i>Sales Meeting Mastery – Sales Bootcamp 2018</i>		Turn Quotes into Sales Letters Turn your quotes into a powerful piece of sales copy to increase the amount that get accepted. <i>The Persuasive Quote – Sales Webinars; Review Membership Site – Sales Resources</i>		Create a "Wow" Marketing Pack Create a package to "wow" potential clients during your sales process and stand out as an authority. <i>Marketing Business to Business – Marketing Webinars; The Company Profile – Sales Webinars</i>

Conversion

Use a Virtual Quoting Process Have a process for giving people quotes virtually by video call <i>Ask on the Facebook Group</i>	Create an Upselling Process Teach your team to upsell when onsite to generate more work per client and provide better customer service <i>The Upselling Maximiser – Sales Webinars</i>	Get Testimonials (Video and Written) Capture both written and video testimonials to build trust and authority with potential clients <i>Review Getting Testimonials Guide – Marketing Resources; Ask on the Facebook Group</i>
Implement Business to Business Sales Scripts (Builders, Property Managers, etc) Create a process and script for your sales meeting to give you the best chance of securing work <i>Module 4 The Sales Meeting – Business of Business Bootcamp 2019</i>	Use a Quote Request Form Create a quote request form to qualify and pre-frame to prospective clients <i>Review the Membership Site - Sales Resources; Quote Preparation and Delivery – Sales Resources</i>	Use a Virtual Sales Presentation Run sales meetings and present quotes virtually using tools like Zoom. <i>Ask on the Facebook Group</i>
Visual Sales Presentation Create a visual sales presentation to use when doing site visits of presenting quotes <i>Visual Sales Presentation – Sales Resources; Quote Preparation and Delivery – Sales Resources</i>	Client Questionnaire Use a questionnaire to get client involved in sales process and build commitment to your solution. <i>Review Pre-Visit (value building) - Sales Resources; Ask on the Facebook group</i>	Implement a System to Fill Workflow Gaps Create a hot and warm list of clients and use the cold call script to get quick work. <i>Dialling for Dollars – Sales Webinars Cold Call Script – Sales Resources</i>

Delivery

Delivery is about getting quality work done in a timely fashion and to a high standard of quality. It takes into account capacity to get work done, systemisation of work being done, and the performance and accountability of the team when delivering a great result.

	Foundation – do first		Foundation – good idea		Choose as appropriate
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CAPACITY AND STRUCTURE	PERFORMANCE AND ACCOUNTABILITY	SYSTEMS
Map Hiring Process Map out the 11-step hiring process so you can determine the best employees. <i>The 11-Step Hiring Process – 10 Minute Tactic</i>	Core Values Create core values as guiding principles for what's important in your business. <i>Create a High Performance Team – Team Webinars</i>	Implement or Upgrade Job Management Software Implement or upgrade your job management software. <i>The Right Systems for Your Trades Business – Systems Webinars; Facebook Units “I have Job Management Software questions”</i>
Write Killer Job Ads Follow this process to attract the best candidates. <i>The Right People - Module 2 Team Bootcamp 2017; Job Ads: How to Fill Your Inbox with Applicants – Team Webinars</i>	Rules of the Game Create rules of the game for how your team operates. <i>Create a High Performance Team – Team Webinars</i>	Office Checklist Create an office checklist to make sure everything gets done. <i>How to Get Your Office Running Like a Well-Oiled Machine – Systems Webinars; Review Office Administrator Checklists – Systems Resources</i>
Become an Employer of Choice Tips for positioning your business as an amazing place to work and attract great staff. <i>Create a High Performing Team – Team Bootcamp 2016</i>	Team Alignment Day Run an alignment day to get the team to focus and buy into the company direction. <i>Module 4 Team Alignment Day – Team Bootcamp 2019</i>	Create an Admin Manual Create an admin manual of all admin related processes <i>How to Get Your Office Running Like a Well-Oiled Machine – Systems Webinars; Review Administration Manual – Systems Resources</i>

Delivery

CAPACITY AND STRUCTURE	PERFORMANCE AND ACCOUNTABILITY	SYSTEMS
Interview Like a Boss Create an interview template to ask the right questions during an interview. <i>Interview Like A Boss - Team Bootcamp 2019</i>	Set Staff KPIs Create and implement Key Performance Indicators for staff accountability. <i>KPI's & KPA's – Team Webinars</i> <i>Facebook Units "I have questions around KPIs and incentives"</i>	Proactively Hire Use the Employer of Choice & Proactive Hiring checklists to create better tenure and build your team <i>The New Approach to Building Your Team – Team Webinars (Webinar and Workbook)</i>
Hire an Ops Manager Recruit an Operations Manager to help with managing larger teams and quality control <i>How to Hire the Right Staff - Team Webinars; The Hiring Masters – Team Webinars; Ask on the Facebook Group</i>	Create Job Descriptions Create formal JDs for clarity of roles, that you can use for accountability. <i>How to Create a High Performing Team – Team Webinars</i>	Create QA Checklists Use quality assurance checklists to maintain quality onsite and reduce call backs. <i>The Right Systems for Your Trades Business – Systems Webinars; First Things First – Systems Bootcamp 2018; Review Quality Assurance Checklists – Systems Resources</i>
Remove my Tools from the Van Remove your tools and stop being tempted to fill the gaps yourself. <i>Just do it 😊</i>	Performance Appraisals Introduce regular and structured performance appraisals (at least every six months) <i>Performance Appraisals: How to Create a Killer Team Culture – Team Webinars</i>	Create Pre-Job Checklists Use a pre-job checklist to make reduce “muck around” and save time on site. <i>The Right Systems for Your Trades Business – Systems Webinars; First Things First – Systems Bootcamp 2018; Review Pre-Job Checklists – Systems Resources</i>
Task Analysis Record and analyse the tasks to determine the best use of each team members and what tasks need to be delegated and/or whether new positions are needed. <i>The Productivity Myth - Virtual Bootcamp March 2020; How to Get Your Office Running Like a Well-Oiled Machine – Systems Webinars</i>	“The 20” Introduce 20-minute coaching session to “check-in” with the team and build accountability, culture, and give feedback. <i>Create a High Performing Team – Team Bootcamp 2016</i>	Implement or Upgrade Accounting Software Implement Xero, MYOB or Quickbooks and leave complicated spreadsheets in the past. <i>Ask on the Facebook Group</i>

Delivery

CAPACITY AND STRUCTURE	PERFORMANCE AND ACCOUNTABILITY	SYSTEMS
Create Job Descriptions Create formal JDs for clarity of roles. <i>How to Create a High Performing Team – Team Webinars</i>	Apprentice Training Program Structure your apprentice training to gain focus and develop great tradespeople. <i>Module 5 Apprentice Training – Team Bootcamp 2019</i>	Operations Manual Use an Operations Manual as a “go-to” for staff processes and procedures. <i>The Right Systems for Your Trades Business – Systems Webinars; First Things First – Systems Bootcamp 2018</i>
Create an Organisational Structure Chart Map the organisational structure of your business for what positions you need. <i>Structure Your Business for Growth and Success – Team Webinars; Module 5 The Right Seats – Team Bootcamp 2017</i>	Create “Belonging” within the team Uniforms, social events, etc create loyalty and a feeling of belonging. <i>Ask on the Facebook Group</i>	Equipment Register Create a register of all equipment and tools. <i>Ask on the Facebook Group</i>
Create Employee Induction Process Create a process for the induction of new employees. <i>The Employee Induction Process – Team Webinars</i>	Personal Goal Setting Engage the team in setting personal goals to build personal motivation. <i>Module 4: Team Alignment Day – Team Bootcamp 2019; The Success Roadmap – Leadership Webinars</i>	Takeoff Software e.g., Groundplan Implement software to help with ease and accuracy of quoting and project planning. <i>Groundplan Takeoff – Virtual Bootcamp July 2020</i>
Employee Agreements Have proper official employment agreements with staff. <i>Contact local HR provider for advice</i>	Training and Development Plans Create development plans for staff to create “brightness of future”. <i>Module 5 Apprentice Training – Team Bootcamp 2019; How to Get Buy <u>In</u> From Staff – 10 Minute Tactic</i>	Complete Regular Stocktakes Regularly measure stock holding to calculate true materials expenses and get clear on margins. <i>The Right Systems for Your Trades Business – Systems Webinars; Facebook Units “I’m looking for tips and tricks that may be useful”; Brad Martin, Tradesman to Businessman – Leadership Webinars</i>

Delivery

CAPACITY AND STRUCTURE	PERFORMANCE AND ACCOUNTABILITY	SYSTEMS
Hire More Tradespeople (or Techs) Increase capacity to do more work on site. <i>How to Hire the Right Staff – Team Webinars;</i> <i>The Hiring Masters – Team Webinars</i>	Performance Management Have a process for managing bad apples either up, or out. <i>Michael Smyth: How to Get Rid of the Bad Apples – Team Webinars</i>	Van Stock Template Create a van stock template and complete regular van stock takes. <i>The Right Systems for Your Trades Business – Systems Webinars; Facebook Units “I’m looking for Tips and Tricks that may be useful”; Brad Martin, Tradesman to Businessman – Leadership Webinars; Review Van Stock – Systems Resources</i>
Hire an Apprentice Increase capacity to do more work on site and develop future tradespeople. <i>How to Hire the Right Staff – Team Webinars;</i> <i>The Hiring Masters – Team Webinars; Module 5</i> <i>Apprentice Training – Team Bootcamp 2019</i>	Create Written Processes If a system is not written or documented, it is NOT a system, it’s a skillset 😊	Workshop Stock Template Create a workshop stock template and complete regular workshop stocktakes. <i>The Right Systems for Your Trades Business – Systems Webinars; Facebook Units “I’m looking for Tips and Tricks that may be useful”; Brad Martin, Tradesman to Businessman – Leadership Webinars;</i>
Technology Audit Review your use of technology to improve efficiency, save time and reduce costs. <i>Review 50 Must Have Apps for Trade Businesses – Systems Resources</i>	A-Z of Operations Map all operations of your business start to finish and identify systems that need to be created or improved. <i>The Right Systems for Your Trades Business – Systems Webinars</i>	

Cashflow

Cash is oxygen for your business. Every business needs cash to pay its bills as the fall due.

	Foundation – do first		Foundation – good idea		Choose as appropriate
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Review Profit Margins Check that the profit margins on your jobs is high enough. <i>The Profit Maximiser – Financials Webinars; The Margin Masters – Financials Webinars; Review the Pricing section of the 5 Drivers</i>	Take Deposits Increase the amount of deposit you take before starting a job. <i>Module 7 Nick Kerr – Numbers Bootcamp 2018; Ask on the Facebook group</i>	Accounts Receivable Process Map out and script your accounts receivable process so you have a system to follow. <i>How to Get Paid In Full On Time Every Time – Financials Webinars; Module 7 Nick Kerr – Numbers Bootcamp 2018; Review Cashflow and Accounts Receivable – Financial Resources</i>
Implement/Upgrade Terms of Trade Ensure you have the right legal protections in place in case your clients don't pay. <i>How to Get Paid in Full on Time Every Time – Financials Webinars; Module 7 Nick Kerr – Numbers Bootcamp 2018</i>	Enquiry Script Use an enquiry script to qualify potential clients before agreeing to do their work. <i>Module 2 First Impressions – Sales Bootcamp 2018</i>	Credit Card Payments Ensure you capture client credit card details prior to beginning the job and offer payment by credit card. <i>Ask on the Facebook Group</i>
Shorten Payment Terms Ask for payment on completion, or shorten payment terms (e.g., from 20 th of the month to 7 days). <i>How to Get Paid In Full On Time Every Time – Financials Webinars; Module 7 Nick Kerr – Numbers Bootcamp 2018</i>	Make Progress Claims Change payment terms to include regular progress claims rather than stages or on completion. <i>Ask on the Facebook Group</i>	Create an Emergency Fund Set aside at least three months operating expenses as cash reserves. <i>Ask on the Facebook Group</i>
Weekly Cashflow Forecast Create a weekly cashflow forecast for the next 12 weeks. <i>How to Complete a Cashflow Forecast – 10 Minute Tactic</i>	Delegate Invoicing Train other team members to invoice jobs out. <i>How to Delegate – Virtual Bootcamp March 2020</i>	Debt Collection Agency Set up an account with a debt collection agency. <i>Facebook units “I’m having trouble getting paid”</i>

Cashflow

<p>Deal with Invoicing Complaints Create a script and process to deal with clients who complain about their invoice. <i>How to Deal with Invoicing Complaints – 10 Minute Tactic</i></p>	<p>Provide Finance Organise a finance provider that your clients can use to pay for their jobs. <i>Ask on the Facebook group; Facebook units “Consumer Finance and Payment Terms”</i></p>	<p>Review other Cash Expenses Review your balance sheet for other cash costs such as loan principal repayments, outstanding debts to merchant/tax office, extra drawings, etc. that don't appear in your P and L. <i>Mastering the Profit and Loss Statement – Financials Webinars:</i></p>
<p>Hire Additional Administration Help Improve the speed of invoicing by getting more help to complete your invoices. <i>How to Hire the Right Staff – Team Webinars; How to Get Your Office Running Like a Well-Oiled Machine – Systems Webinars</i></p>	<p>Utilise Your Job Management Software Ensure accurate and timely completion of job cards. <i>Review the Delivery section of the 5 Drivers; Ask on the Facebook group</i></p>	<p>Toughen Up Asking for Money Mental roadblock for many people. But crucial to conquer. <i>Live a Bigger Life: Bust Through Mental Roadblocks – Leadership Webinars</i></p>
<p>Overdraft or Line of credit Set up an overdraft or line of credit with your bank. <i>Ask on the Facebook group.</i></p>	<p>Negotiate Payment Terms Negotiate a suitable payment arrangement with for outstanding accounts (e.g., Tax, Merchants etc.) <i>Ask on the Facebook group</i></p>	

Leadership

Your business reflects your skill as a business owner. A better business requires you to become a better business owner. If you want your team to be motivated and productive, you must set the example.

	Foundation – do first		Foundation – good idea		Choose as appropriate
Vision Book Create a clear vision for what you want from your business and more importantly your life. <i>Create Your Ideal Life – Module 2 Virtual Bootcamp November 2020</i> <i>The Success Roadmap – Leadership Webinars</i>		Time Productivity Analysis Measure how you are currently spending your time so you can see what the “time sucks” are <i>The Personal Productivity Upgrade – Leadership webinars</i>		Default Diary Set up a default plan for your time to make time for important business improvement tasks and self-care. <i>How to Manage Time Effectively – 10 Minute Tactic; Urgent vs Important Tasks – 10 Minute Tactic; The Personal Productivity Upgrade – Leadership Webinars</i>	
Business Maturity Plan Create a picture of how your business will look when your business is completed <i>The Business Maturity Plan – Module 5 Business of Business Bootcamp 2019</i>		Upgrade My Thinking Uncover and challenge the limited beliefs that are sabotaging your business success <i>Live a Bigger Life: Bust Through Mental Roadblocks – Leadership Webinars</i>		Ask for Help Commit to asking for help when stuck and not letting your ego or fear of looking silly stop you from growing <i>Ask on the Facebook Group</i>	
Learn to Say “No” Stop letting other people drive your day/life <i>Ask on the Facebook Group</i>		Delegate The \$20 per Hour Tasks Delegate all the low hourly rate work that is clogging up your diary and preventing your business thriving <i>How to Delegate – Virtual bootcamp March 2020</i>		Partnerships that Prosper Learn how to build a business partnership that works for all parties – whether that be business partners and/or life partners. <i>Partnerships That Prosper – Leadership Webinars; Ask on the Facebook Group</i>	
Build Inspiration and Motivation Review the stories of other success business owners who have transformed their businesses working through the coaching program <i>Watch Client of the Quarter interviews in the membership site under each Bootcamp</i>		Listen to/Read Business Books Commit to listening to audiobooks or reading books. <i>Ask on the Facebook Group</i>		Learn to Lead Improve your ability as a leader in your business <i>Learn to Lead – Module 2 Bootcamp November 2019</i>	

Leadership

Your Hourly Rate Calculate what your hourly rate is worth to the business when doing the most important work. <i>The Productivity Myth – Virtual Bootcamp March 2020</i>	The Pre-Loaded Year Plan out the year with all the important activities such as holidays, team days, performance appraisals, business planning meetings, etc. <i>The Pre-Loaded Year – Systems Webinars</i>	Appoint a General Manager <i>Ask on the Facebook Group</i>
Affirmations Create a list of affirmations that you review daily to create a positive mental focus. <i>Live a Bigger Life: Bust Through Mental Roadblocks – Leadership Webinars</i>	Schedule Me Time Block self-care and family time into your Default Diary <i>The Success Roadmap – Leadership Webinars; How to Manage Time Effectively – 10 Minute Tactic; Urgent vs Important Tasks – 10 Minute Tactic</i>	80/20 Rule Apply the 80/20 rule to every area of your business. What is the 20% of time, clients, staff that if you focus on, you'll get 80% of the results. <i>Ask on the Facebook Group</i>
Stop Doing List Create a stop doing list of all the things that you no longer want to do. <i>The Productivity Myth – Virtual Bootcamp March 2020</i>	Upgrade My Mindset Uncover the stories you're telling yourself and change them to the stories you want to live out. <i>Changing your Inner Stories – Leadership Webinars. How to Reset Your Mindset and Power up in Stressful Times – Leadership Webinars</i>	Create your Business Roadmap Unpack the big rocks in your business that have and haven't been hit so you can grow seamlessly. <i>The Blackbelt Business Roadmap – Leadership Webinars</i>