The 6 Week Planning Cycle

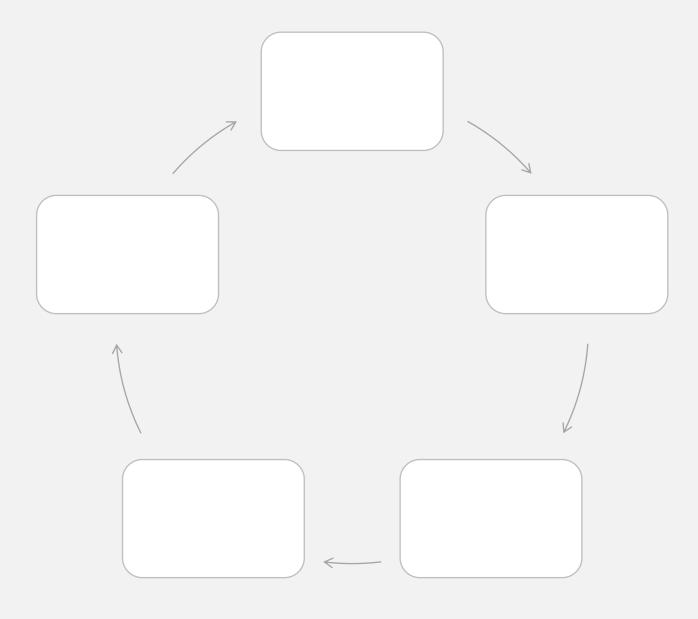


The Momentum Snapshot

Past Present **Future** What are you most proud of? What are you most confident about? What are you most excited about? Wins Why



The Planning Cycle





THE 6 DRIVERS

MARKETING	FINANCIALS	SALES	TEAM	SYSTEMS	LEADERSHIP
•	•	•	•	•	•
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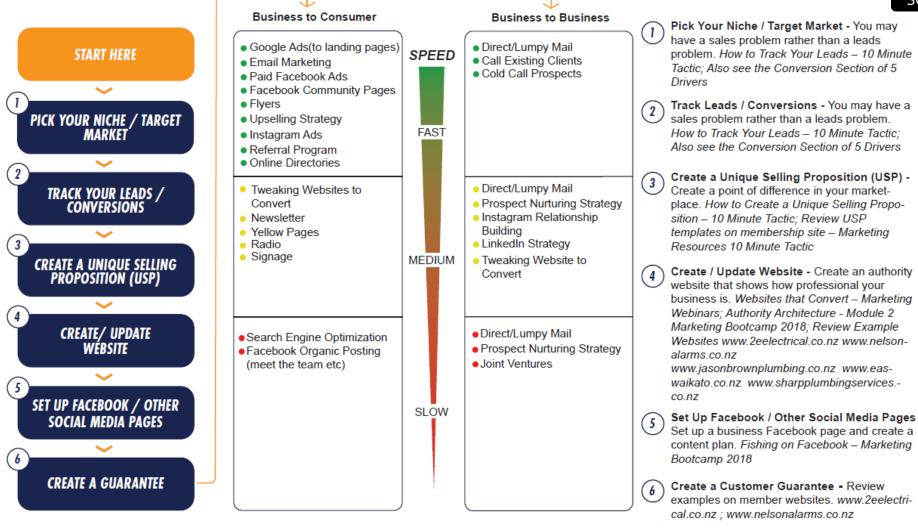
THE PROFITABLE TRADIE ROADMAP

	Financials	Systems	Team	Marketing	Sales	Leadership	
SIGNIFICANCE \$5M-PLUS	Risk Management Strategy Manage Balance Sheet Drive Business Equity Value	Drive Automation to Improve Efficiency Develope a Franchise Prototype On-line Directory of Systems & Processes	Hire a General Manager Coach & Nurture Management Team Create Succession Plan	Optimise Current Marketing Channels Outspend Competitors to Dominate Market Become Market Authority	High Level Relationship Building Drive Sales Conversions Build Sales Team	Board of Directors Acquisitions/New Markets & other Growth Strategies Personal Meaning & Well Being	>>
SCALE \$2M-\$5M	Measure Work in Progress Advanced Financial Analysis Separate Profit & Loss for Divisions	Write Operations Manual Customer Relationship Management (CRM) Stock Control System	Build Management Team Meeting Rhythm and Structures Design Organisation Structure	Develop Comprehen - sive Marketing Plan Add profitable market niches Build Marketing Team	Appoint Business Development Manager Advanced Sales Training Sales Scripts for Site Visits	The Buy Back Principle Upgrade Personal Leadership Convert Profit Into Wealth	>>< >><
SUCCESS \$1M-\$2M	Advanced Back Costing Cash Flow Forecasting Planning for Profit & Budgets	Map A-Z of Operations Design Pre-Job Checklists & Processes Build Pricing Templates Fixed pricing	Appoint Operations Manager Implement the 20 Employer of Choice Strategy	Prospect Nurture System Add another Target Market Appoint Marketing Co-Ordinator	The Persuasive Quote Company Profile Hire an Estimator	Business Maturity Plan Leadership Training for Owners Identify Your Genius Zone	>>< >><
STABILITY \$500K-\$1M	Accounts Receivable Process Design Monthly KPI's Implement Profit First	Administration Manual Quality Assurance Checklists Cloud Based File Storage	Core Values Rules of the Game Appoint Office Manager	Track Marketing Results & ROI 2-3 Marketing Strategies for Target Market Quick Response Marketing Tools	Map the Sales Process Implement Servicing Program Follow Up Process	Complete Vision Book Pre-loaded Year Create a Stop Doing List	>× >×<
SURVIVAL \$300K-\$500K	Run Monthly Profit and Loss Back Cost all Jobs Price for Gross Margin	Install Job Management Software Install Accounting Software Install Payroll Software	Job Descriptions Improve Hiring Process Regular Performance Appraisals	Create Website Build Social Media Presence Build Client Database	Take Deposits Upselling Process	Time Productivity Analysis Default Diary Audible & Business Books	>>< >><
STARTUP \$0-\$300K	Get Paid Now Fix Payment Terms Filter Job Enquiries		Attract A Players Create Hiring Process Make Irresistable Offer	Sharpen Key Message Choose Marketing Method			> <

MARKETING

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





MARKETING

	CHOOSE AS APPROPRIATE						
Run Paid Facebook Ads Create a compelling offer using copy templates, and boost the ad to selected audiences. The Facebook Lead Machine – November Bootcamp 2019	Create an Upsell Checklist Teach your team to upsell when onsite to generate more work per client and provide better customer service. The Upselling Maximizer – Sales Webinars	Upgrade Building Signage Create signage that grabs attention and delivers jobs, Mastering Offline Marketing – Marketing Webinars, Ask in the Facebook Group					
Yellow Pages Directory List your business in the Yellow Pages Directory. Review Yellow Pages – Marketing Resources	Create a Company Profile Create a company profile, position yourself as a market leader and stand out from the crowd The Company Profile – Sales Webinars	Instagram Marketing Set up an Instagram page and create a strategy for connecting with potential business to business clients. Building Business on Instagram – Virtual Bootcamp July 2020					
Run Lead Generation Magnets Create offers to secure potential client email address and details for follow up marketing. Ask on the Facebook Group.	Create a Servicing Program Create a system for locking in repeat servicing work, guaranteed Ask on the Facebook Group	Upgrade Site Signage Create signage that grabs attention and delivers jobs Mastering Offline Marketing – Marketing Webinars, Ask on the Facebook Group					
Get Testimonials (Video & Written) Capture both written and video testimonials to build trust and authority with potential clients Review Getting Testimonials Guide – Marketing Resources; Ask on the Facebook Group	Create a Referral System Create a referral system to turn "word of mouth" into an actual strategy Referral Marketing with Michael Griffiths – Marketing Webinars	Upgrade Vehicle Signage Create signage that grabs attention and delivers jobs The Email Accelerator – Marketing Webinars					
Send a Regular Newsletter Send a regular newsletter to your database. The Prospect Nurture System – Marketing Webinars, Marketing to Your Existing Clients and Prospects – Marketing Webinars	Target work through Property Managers Create a marketing strategy that specifically targets property managers Win Work with Property Managers – Marketing Webinars; The Prospect Nurture System – Marketing Webinars	Search Engine Optimisation (SEO) Get your business ranking high on google search results How to Get the Most from SEO – 10 Minute Tactic; Ask for providers on the Facebook Group					
Get (Revi	Online Build credibility by developing a system to Google, Facebook, etc.) Ask on the Facebook Group	get positive online reviews (e.g.					

SCAN ME

MARKETING

	CHOOSE AS APPROPRIATE	
Run Ad Words Campaign Drive website traffic and specific web offers using Google AdWords. Josh Moore from Duoplus – Module 6 Marketing Bootcamp 2018 Ask on the Facebook Group	Direct (Lumpy) Mail Send lumpy mail packs to prospective business to business clients (Builders, Property Managers, Real Estate, Architects etc.) Marketing Business to Business – Marketing Webinars; Ask on the Facebook Group	Email Marketing to Your Database Create email offers that generate work quickly. The Email Accelerator – Marketing Webinars
Create a Prospect Nurture System Create a system to nurture prospects from cold through to buyers. Very effective for business to business marketing. The Prospect Nurture System – Marketing Webinars	Compile a Customer Database Create a list of client emails and/or mobile numbers for future marketing. Marketing to Existing Clients – Marketing Webinars; The Email Accelerator – Marketing Webinars; Ask on the Facebook Group	Council Consents Lists Sign up to receive a list of consents coming from Council. Ask on the Facebook Group
List in online directories (e.g. No Cowboys, Gum Tree, Yellow Pages, Trade Me etc.) Ask on the Facebook Group	Distribute a Flyer Campaign Design and send flyers around the local area. The Flyer Blueprint – Marketing Webinars	Join a Networking Group (e.g. BNI) Join a networking group to generate referral business in your local community. Ask on the Facebook Group
LinkedIn Marketing Create a LinkedIn profile and market directly to potential clients (Builders, Property Managers, etc)	Grow Facebook Following with Competitions Run competitions and giveaways on Facebook to grow your followers. Spotlight How to Create a Facebook Following – Business of Business Bootcamp 2019	Hire Marketing Assistant Many business owners don't have the time to dedicate to marketing – get some help. How to Hire the Right Staff – Team Webinars; How to Hire a Marketing Student – 10 Minute



FINANCIALS - PROFIT

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.



Review the profitability of each job to see how profitable your jobs are and what needs improving.

Pricing for Profit – Module 6 Numbers Bootcamp 2017;

How to Back Cost Effectively – 10 Minute Tactics at the end)

Complete your monthly KPIs and send through to the Profitable Tradie team. How to Fill Out Your KPI Sheet – 10 Minute Tactic; Planning for Profit – 10 Minute Tactic

Review your pricing to determine where increases can and should be made. The Profit Maximizer – Financials Webinars; Get Paid What You're Worth – Virtual Bootcamp July 2020

Calculate targets to aim for along with KPI measurement that result in ACTUALLY making healthy profits. Set Targets – Module 2 Numbers Bootcamp November 2018; Planning for Profit – 10 Minute Tactic The Profit Maximizer – Financials Webinars; The Margin Masters – Financials Webinars; Pricing for Profit – Module 6 Numbers Bootcamp 2017

START HERE

REVIEW JOB PROFITABILITY

2 REVIEW MONTHLY P&L

SUBMIT MONTHLY KPI'S

GET PAID WHAT YOUR WORTH

REVIEW PRICING STRATEGY

IMPLEMENT / UPGRADE
JOB MANAGEMENT /
ACCOUNTING SOFTWARE

SET TARGETS / PLAN FOR PROFIT

PROFIT FIRST

Set up your profit and loss so you can track your financial performance. 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)

Improve your money mindset and learn how to get paid what you are worth. Get Paid What You're Worth – Virtual Bootcamp July 2020

Implement or upgrade your job management software. The Right Systems for Your Trades Business – Systems Webinars; Facebook Units "I have Job Management Software Questions". Implement Xero, MYOB or Quickbooks and leave complicated spreadsheets in the past. Ask on the Facebook Group

Follow Mike Michalowicz's proven cash budgeting system to ensure you make healthy profits year on year.

Profit First with Mike Michalowicz – Financials Webinars

FINANCIALS - **PROFIT**

	CHOOSE AS APPROPRIAT	E
Create Fixed Pricing for Service Work Create fixed pricing templates (price book) for servicing work. Fixed Pricing with Doug Brennan – Financial Webinars	Measure Work in Progress Calculate your work in progress to ensure you have an accurate monthly gross profit. Module 5 Telling the Story – Numbers Bootcamp 2018	Create a workshop stock template and complete regular workshop stock takes. 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 –
Create Van Stock Template Create a van stock template and complete regular van stock takes. 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 – Leader- ship Webinars	Implement GPS systems Implement GPS systems in your vans to track travel and time on site. The Right Systems for Your Trades Business – Systems Webinars; Facebook Units "I'm looking for Tips and Tricks that may be useful"	Hire an Estimator Delegate pricing to an Estimator to ensure pricing gets down quickly. How to Hire the Right Staff – Team Webinars; Module 5 The Right Seats – Team Bootcamp 2017; The Hiring Masters – Team Webinars
Create Sales & Expenses Budget Plan full year budget so you have clear targets to assess your P & L against. Module 2 Set Targets - Numbers Bootcamp 2018	Use Takeoff Software Implement software to help with ease and accuracy of quoting and project planning. Module 5 Telling the Story – Numbers Bootcamp 2018	Calculate Break-Even Calculate the break-even sales point for your business. How to Calculate Break-Even – Financial Webinars
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). KPI Selector – Financial Resources; Ask on the Facebook Group	Complete Regular Stocktakes Regularly measure stock holding to calculate true materials expenses and get clear on margins. 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	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. How to Hire the Right Staff – Team Webinars; Module 5 The Right Seats – Team Bootcamp 2017; The Hiring Masters – Team Webinars
	Create Pricing Templates/Pre-Built Prices Create pricing templates for larger jobs to improve the speed and accuracy and margins of quoting. Systemise your Pricing – Business of Business Bootcamp 2019	



FINANCIALS - CASH

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



Check that the profit margins on your jobs is high enough

The Profit Maximizer – Financials Webinars; The Margin Masters – Financials Webinars; Review the Pricing section of The 5 Drivers

- Increase the amount of deposit you take before starting a job Module 7 Nick Kerr Numbers Bootcamp 2018;
 Ask on the Facebook group
- Use an enquiry script to qualify potential clients before agreeing to do their work. Module 2 First Impressions Sales Bootcamp 2018
- Change payment terms to include regular progress claims rather than stages or on completion Ask on the Facebook Group

START HERE

REVIEW JOB PROFITABILITY

- IMPLEMENT ACCOUNTS
 RECEIVABLE
- TAKE DEPOSITS
- TERMS OF TRADE
- 5 ENQUIRY SCRIPT
- 6 SHORTEN PAYMENT TERMS
- MAKE PROGRESS CLAIMS
- IMPLEMENT WEEKLY CASHFLOW FORECAST

Map out and script your accounts receivable process so you have a system to follow

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

- Ensure you have the right legal protections in place in case your clients don't pay How to Get Paid in Full On Time Every Time Financials Webinars; Module 7 Nick Kerr Numbers Bootcamp 2018
- Ask for payment on completion, or shorten payment terms (e.g. from 20th of the month to 7 days)

 How to Get Paid In Full On Time Every Time Financials

 Webinars; Module 7 Nick Kerr Numbers Bootcamp 2018

Create a weekly cashflow forecast for the next 12 weeks

How to Complete a Cashflow Forecast – 10 Minute

Tactic

FINANCIALS - CASH

	CHOOSE AS A	APPROPRIATE	
Hire Additional Administration Help Improve the speed of invoicing by getting more help to complete your invoices How to Hire the Right Staff – Team Webinars; How to Get Your Office Running Like a Well-Oiled Machine – Systems Webinars	Toughen Up Asking Mental roadblock for man to conquer Live a Bigger Life: Bust Toucher Roadblocks – Leadership	y people. But crucial hrough Mental	Delegate Invoicing Train other team members to invoice jobs out How to Delegate – Virtual Bootcamp March 2020
Create an Emergency Fund Set aside at least three months operating expenses as cash reserves Ask on the Facebook Group	Deal with Invoicing Create a script and proces complain about their invoicing Tactic	ss to deal with clients who ce	Negotiate Payment Terms Negotiate a suitable payment arrangement with for outstanding accounts (e.g. Tax, Merchants etc.) Ask on the Facebook group
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&L Mastering the Profit and Loss Statement – Financials Webinars: Utilize Your Job Man Software Ensure accurate and time cards Review the Delivery section Ask on the Facebook ground		ly completion of job	Provide Finance Organize a finance provider that your clients can use to pay for their jobs Ask on the Facebook group; Facebook units "Consumer Finance and Payment Terms"
Overdraft or Line of credit Set up an overdraft or line of credit with your bank. Ask on the Facebook group		Set up an acc	ection Agency count with a debt collection agency its "I'm having trouble getting paid"



SALES

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.



You may have a sales problem rather than a leads problem. How to Track Your Leads – 10 Minute Tactic

2 MAP SALES PROCESS

START HERE

TRACK LEADS / CONVERSIONS

Map out your sales process to get clarity around what steps you have, and what steps you need to create.

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

Upgrade my thinking around sales and become a more confident and skilled at sales.

Module 1 Sales Psychology – Sales Bootcamp 2018)

UPGRADE MY SALES MINDSET

CREATE ENQUIRY SCRIPT

FOLLOW UP PROCESS

Use an enquiry script to qualify leads, pre-frame sales steps and payment terms.

Module 2 First Impressions – Sales Bootcamp 2018

Create a follow up process for quotes

The Follow Up – Sales Webinars

GET PAID WHAT YOUR WORTH

Master the art of getting paid better margins, from pricing to your sales process

How to Get Paid What You're Worth – Virtual Bootcamp July 2020

Teach your team to up-sell when on-site to generate more work per client and provide better customer service. The Upselling Maximizer – Sales Webinars

CREATE UP-SELLING PROCESS

IMPLEMENT SALES MEETING
SCRIPT

Managers, etc) Create a process and script for your B2B sales meeting to give you the best chance of securing work Module 4 The Sales Meeting – Business of Business Bootcamp 2019

Residential Sales Scripts. Create a process and script for your sales meeting to give you the best chance of closing the job. Sales Meeting Mastery – Sales Bootcamp 2018

CONTINUED...

SALES



Turn your quotes into a powerful piece of sales copy to increase the amount that get accepted. The Persuasive Quote - Sales Webinars; Review

Membership Site - Sales Resources

Create an ongoing follow-up system for potential business customers. How to Track Your Leads - 10 Minute Tactic

CONTINUED CREATE A PERSUASIVE QUOTE 10 **CREATE A COMPANY**

PROSPECT NURTURE

Create a company profile, position yourself as a market leader and stand out from the crowd. The Company Profile Sales Webinars

CHOOSE AS APPROPRIATE Get Testimonials (Video and Writ-Create a "Wow" Marketing Pack Implement a Triage Call ten) Capture both written and video Create a package to "wow" potential clients For larger jobs use a triage call to qualify leads, testimonials to build trust and authority with during your sales process and stand out as pre-frame sales steps and payment terms prior potential clients. an authority to the site visit Marketing Business to Business - Marketing Review Getting Testimonials Guide -How to Get Paid What You're Worth - Virtual Webinars: The Company Profile - Sales Marketing Resources Bootcamp July 2020 Ask on the Facebook Group Webinars Use a Quote Request Form Use a Virtual Sales Presentation **Use a Virtual Quoting Process** Create a quote request form to qualify and Run sales meetings and present quotes Have a process for giving people quotes pre-frame to prospective clients. virtually using tools like Zoom. . virtually by video call. Review the Membership Site - Sales Resources; Ask on the Facebook Group Ask on the Facebook Group Quote Preparation and Delivery – Sales Resources

Visual Sale Presentation Create a visual sales presentation to use when doing site visits of presenting quotes Visual Sales Presentation - Sales Resources; Quote Preparation and Delivery – Sales Resources

Client

Use a questionnaire to get client involved in sales process and build commitment to your solution. Questionnaire Review Pre-Visit (value building) - Sales Resources; Ask on the Facebook group

TEAM

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, systemization of work being done, and the performance and accountability of the team when delivering a great result.



Tips for positioning your business as an amazing place to work and attract great staff. Create a High Performing Team – Team Bootcamp 2016

Create core values as guiding principles for what's important in your business. Create a High Performing Team – Team Bootcamp 2016

Create formal JDs for clarity of roles
How to Create a High Performing Team – Team
Webinars

Map the organizational structure of your business for what positions you need.

Structure Your Business for Growth and Success – Team Webinars

Module 5 The Right Seats - Team Bootcamp 2017

Create development plans for staff to create "brightness of future"

Module 5 Apprentice Training – Team Bootcamp 2019;
How to Get Buy In From Staff – 10 Minute Tactics

BECOME THE EMPLOYER OF

START HERE

THE 20

CORE VALUES

RULES OF THE GAME

CREATE JOB DESCRIPTIONS

6

KPIs & KPAs

CREATE STRUCTURE ORG CHART

PERFORMANCE APPRAISALS

CREATE TRAINING & DEVELOPMENT PLANS

Introduce 20-minute coaching session to "check-in" with the team and build accountability, culture, and give feedback Create a High Performing Team –Team Bootcamp 2016

Create rules of the game for how your team operates.

Create a High Performing Team –

Team Bootcamp 2016

Create and implement Key Performance Indicators for staff accountability

Module 3 KPIs – Team Bootcamp 2019 Facebook Units "I have questions around KPIs and incentives"

Introduce regular and structured performance appraisals (at least every six months)

Performance Appraisals: How to Create a Killer Team

Performance Appraisals: How to Create a Killer Tea Culture – Team Webinars

TEAM - HIRING



Map out the 11-step hiring process so you can determine the best employees

The 11-Step Hiring Process – 10 Minute Tactic

Get the Hiring Advantage. The Hiring Advantage –
Bootcamp July 2022

Get clear on the role

Create an interview template to ask the right questions during an interview
Interview Like A Boss - Team Bootcamp 2019

Create development plans for staff to create "brightness of future" Module 5 Apprentice Training – Team Bootcamp 2019; How to Get Buy In From Staff – 10 Minute Tactics

START HERE

MAP THE HIRING PROCESS

CREATE A KILLER JOB AD

GET THE HIRING ADVANTAGE

BECOME THE EMPLOYER OF CHOICE

GET CLEAR ON THE ROLE

CREATE JOB DESCRIPTION

INTERVIEW LIKE A BOSS

CREATE INDUCTION PLAN

CREATE TRAINING &
DEVELOPMENT PLANS

Follow this process to attract the best candidates
The Right People - Module 2 Team Bootcamp 2017; Job
Ads: How to Fill Your Inbox with Applicants –
Team Webinars

Tips for positioning your business as an amazing place to work and attract great staff. Create a High Performing Team – Team Bootcamp 2016

Create formal JDs for clarity of roles How to Create a High Performing Team – Team Webinars

Create a process for the induction of new employees

The Employee Induction Process – Team Webinars

TEAM



	CHOOSE AS APPROPRIATE									
Task Analysis Record and analyze— 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. The Productivity Myth - Virtual Bootcamp March 2020; How to Get Your Office Running Like a Well-Oiled Machine — Systems Webinars	Hire an Apprentice Increase capacity to do more work on site and develop future tradespeople How to Hire the Right Staff – Team Webinars; The Hiring Masters – Team Webinars; Module 5 Apprentice Training – Team Bootcamp 2019	Hire More Tradespeople Increase capacity to do more work on site How to Hire the Right Staff – Team Webinars; The Hiring Masters – Team Webinar								
Hire an Ops Manager Recruit an Operations Manager to help with managing larger teams and quality control How to Hire the Right Staff - Team Webinars; The Hiring Masters – Team Webinars; Ask on the Facebook Group	Implement or Upgrade Accounting Software Implement Xero, MYOB or Quickbooks and leave complicated spreadsheets in the past Ask on the Facebook Group	Employee Agreements Have proper official employment agreements with staff Contact local HR provider for advice								
Remove my Tools from the Van Remove your tools and stop being tempted to fill the gaps yourself Just do it										

SYSTEMS

PRATOIL S

If a system is not written or documented, it is NOT a system, it's a skill set. How to Systemize Your Trades Business - Systems Webinars

- Implement or upgrade your job management software.

 The Right Systems for Your Trades Business Systems
 Webinars; Facebook Units "I have Job Management
 Software questions"
 - Create an admin manual of all admin related processes How to Get Your Office Running Like a Well-Oiled Machine – Systems Webinars; Review Administration Manual – Systems Resources
- Use a pre-job checklist to make reduce "muck around" and save time on site

 The Right Systems for Your Trades Business Systems

The Right Systems for Your Trades Business – Systems Webinars; First Things First – Systems Bootcamp 2018; Review Pre-Job Checklists – Systems Resources

Create a van stock template and complete regular van stock takes
The Right Systems for Your Trades Business – Systems Webinars; Facebook Units "I'm looking for Tips and

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

START HERE

HOW TO CREATE SYSTEMS

- A-Z OF OPERATIONS
- JOB MANAGEMENT SYSTEM
- OFFICE CHECKLISTS
- ADMIN MANUAL
- QA CHECKLISTS
- PRE-JOB CHECKLIST
- 8 CLOCK WORK MIKE M.
- VAN STOCK TEMPLATE
- DO REGULAR STOCKTAKES

Follow this process to attract the best candidates
The Right People - Module 2 Team Bootcamp 2017; Job
Ads: How to Fill Your Inbox with Applicants –
Team Webinars

Create an office checklist to make sure everything gets done. How to Get Your Office Running Like a Well-Oiled Machine – Systems Webinars; Review Office Administrator Checklists – Systems Resources

Systemize the way things happen on-site & increase efficiency QA Checklists – Systems Webinar

Bootcamp July 2022

Regularly measure stock holding to calculate true materials expenses and get clear on margins

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

SYSTEMS



SYSTE	SYSTEMS - CHOOSE AS APPROPRIATE									
Personal Goal Setting Engage the team in setting personal goals to build personal motivation Module 4: Team Alignment Day – Team Bootcamp 2019; The Success Roadmap – Leadership Webinars	July between the team in setting personal goals to personal motivation accuracy of quoting and project planning accuracy of quoting accuracy of									
Workshop Stock Template Create a workshop stock template and complete regular workshop stock takes 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;	Use a Quote Request Form Create a quote request form to qualify and pre-frame to prospective clients. Review the Membership Site - Sales Resources; Quote Preparation and Delivery - Sales Resources	Apprentice Training Program Structure your apprentice training to gain focus and develop great tradespeople Module 5 Apprentice Training – Team Bootcamp 2019								
Use a Virtual Sales Presentation Run sales meetings and present quotes virtually using tools like Zoom Ask on the Facebook Group	Create "Belonging" within the team Uniforms, social events, etc create loyalty and a feeling of belonging Ask on the Facebook Group	Equipment Register Create a register of all equipment and tools Ask on the Facebook Group								

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.

- Set up a default plan for your time to make time for important business improvement tasks and self-care.

 How to Manage Time Effectively 10 Minute Tactic;

 Urgent vs Important Tasks 10 Minute Tactic; The Personal Productivity Upgrade Leadership Webinars
- Create a picture of how your business will look when your business is completed
 The Business Maturity Plan Module 5 Business of Business Bootcamp 2019
- Uncover and challenge the limited beliefs that are sabotaging your business success
 Live a Bigger Life: Bust Through Mental Roadblocks –
 Leadership Webinars
- Delegate all the low hourly rate work that is clogging up your diary and preventing your business thriving How to Delegate – Virtual bootcamp March 2020



LEADERSHIP

SCAN ME

CHOOSE AS APPROPRIATE									
Time Productivity Analysis Measure how you are currently spending your time so you can see what the "time sucks" are The Personal Productivity Upgrade – Leader- ship webinars	Ask for Help Commit to asking for help when stuck and not letting your ego or fear of looking silly stop you from growing Ask on the Facebook Group	Schedule Me Time Block self-care and family time into your Default Diary The Success Roadmap – Leadership Webi- nars; How to Manage Time Effectively – 10 Minute Tactic; Urgent vs Important Tasks – 10 Minute Tactic							
Stop Doing List Create a stop doing list of all the things that you no longer want to do The Productivity Myth – Virtual Bootcamp March 2020	Listen to/Read Business Books Commit to listening to audiobooks or reading books. Ask on the Facebook Group	The Pre-Loaded Year Plan out the year with all the important activities such as holidays, team days, performance appraisals, business planning meetings, etc. The Pre-Loaded Year – Systems Webinars							
Affirmations Create a list of affirmations that you review daily to create a positive mental focus Live a Bigger Life: Bust Through Mental Roadblocks – Leadership Webinars	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. Ask on the Facebook Group	Appoint a General Manager Ask on the Facebook Group							

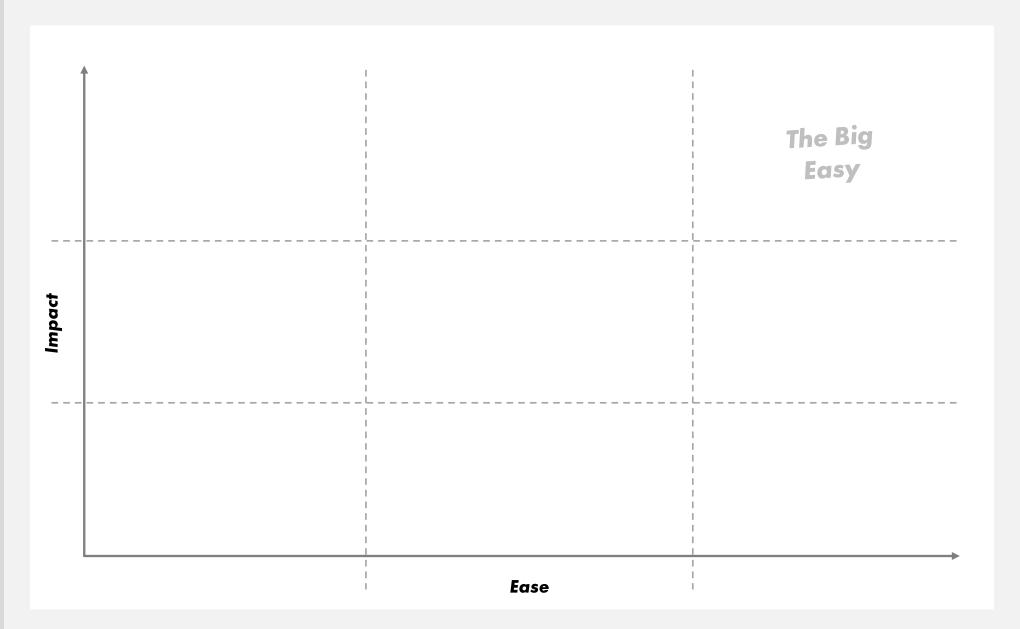
Partnerships that Prosper

Learn how to build a business partnership that works for all parties - whether that be business partners and/or life partners. Partnerships That Prosper – Leadership Webinars; Ask on the Facebook Group

Build Inspiration and MotivationReview the stories of other success business owners who have transformed their businesses working through the coaching program Watch Client of the Quarter interviews in the membership site under each Bootcamp



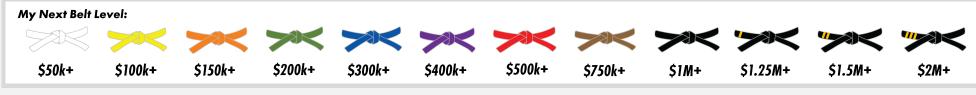
The Betting Table





The Compass		Cycle Begins					Cycle Ends			
Motivation			Carrot				Sı	tick		
Strategy Description	9-Sep	16-Sep	23-Sep	30-Sep	7-Oct	14-Oct	21-Oct	28-Oct	Completed?	

	Strategy Description	9-Sep	16-Sep	23-Sep	30-Sep	7-Oct	14-Oct	21-Oct	28-Oct	Completed?
7										
2										
3										
4										
5										
6										



Signed:

Date:





THE IMPACT FILTER	PROJECT NAME:	DUE	DATE:
PROBLEM What problem are we solving?	WHAT ARE THE (1-6) BIG STEPS?		
IMPACT What difference will it make?			
OUTCOME What will the result look like?	Webinar to Watch	Resource(s) to use	
	webinar to watch	resource(s) to use	

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PROBLEM What problem are we solving?	WHAT ARE THE (1-6) BIG STEPS?		
IMPACT What difference will it make?			
OUTCOME What will the result look like?	Webinar to Watch	Resource(s) to use	
	webinar to watch	resource(s) to use	