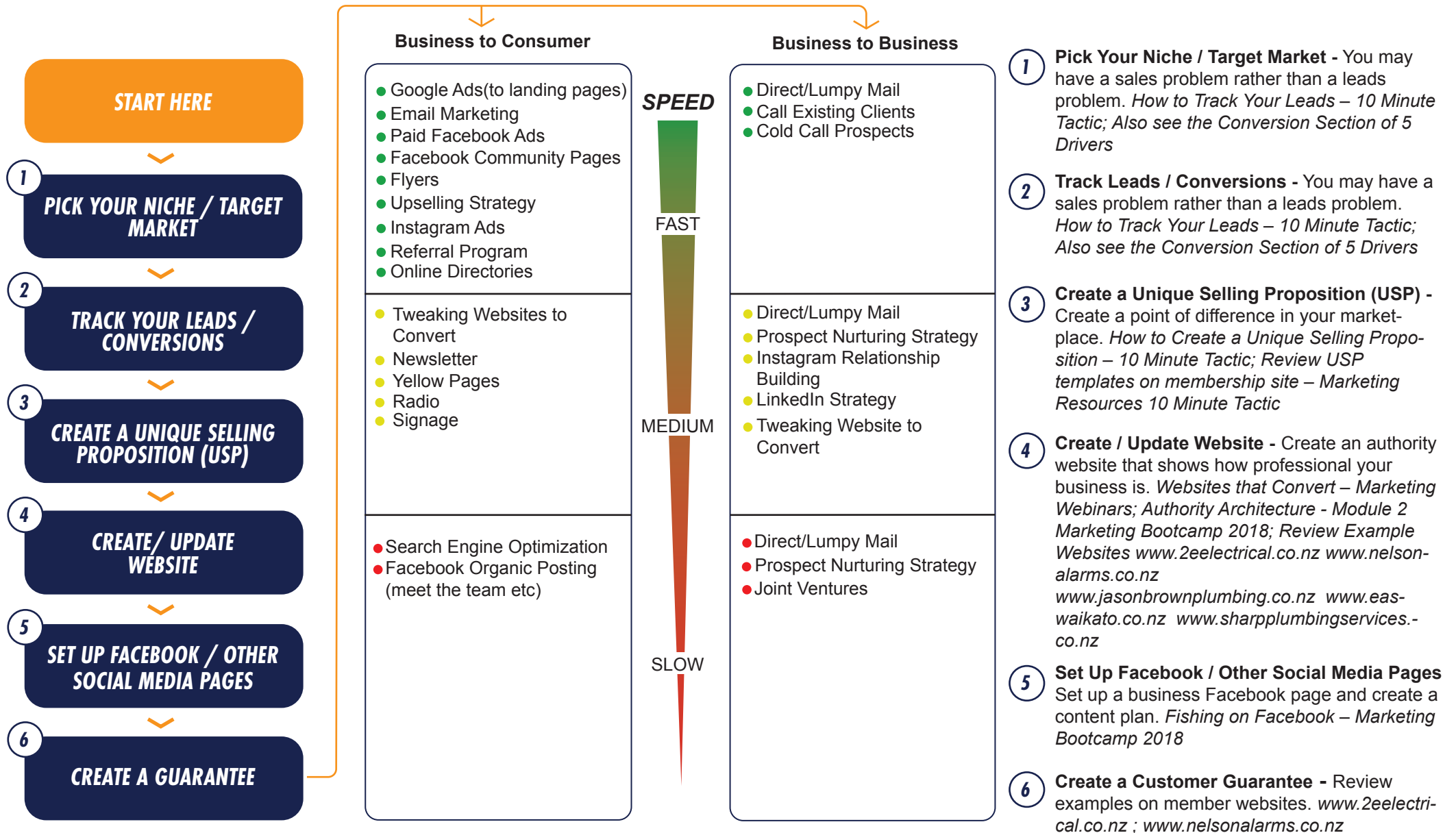


# ***THE TOOLBOX***

# 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

<p><b>Run Paid Facebook Ads</b> Create a compelling offer using copy templates, and boost the ad to selected audiences. <i>The Facebook Lead Machine – November Bootcamp 2019</i></p>	<p><b>Create an Upsell Checklist</b> Teach your team to upsell when onsite to generate more work per client and provide better customer service. <i>The Upselling Maximizer – Sales Webinars</i></p>	<p><b>Upgrade Building Signage</b> Create signage that grabs attention and delivers jobs, <i>Mastering Offline Marketing – Marketing Webinars, Ask in the Facebook Group</i></p>
<p><b>Yellow Pages Directory</b> List your business in the Yellow Pages Directory. <i>Review Yellow Pages – Marketing Resources</i></p>	<p><b>Create a Company Profile</b> Create a company profile, position yourself as a market leader and stand out from the crowd <i>The Company Profile – Sales Webinars</i></p>	<p><b>Instagram Marketing</b> 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></p>
<p><b>Run Lead Generation Magnets</b> Create offers to secure potential client email address and details for follow up marketing. <i>Ask on the Facebook Group.</i></p>	<p><b>Create a Servicing Program</b> Create a system for locking in repeat servicing work, guaranteed <i>Ask on the Facebook Group</i></p>	<p><b>Upgrade Site Signage</b> Create signage that grabs attention and delivers jobs <i>Mastering Offline Marketing – Marketing Webinars, Ask on the Facebook Group</i></p>
<p><b>Get Testimonials (Video &amp; Written)</b> 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></p>	<p><b>Create a Referral System</b> Create a referral system to turn “word of mouth” into an actual strategy <i>Referral Marketing with Michael Griffiths – Marketing Webinars</i></p>	<p><b>Upgrade Vehicle Signage</b> Create signage that grabs attention and delivers jobs <i>The Email Accelerator – Marketing Webinars</i></p>
<p><b>Send a Regular Newsletter</b> Send a regular newsletter to your database. <i>The Prospect Nurture System – Marketing Webinars, Marketing to Your Existing Clients and Prospects – Marketing Webinars</i></p>	<p><b>Target work through Property Managers</b> Create a marketing strategy that specifically targets property managers <i>Win Work with Property Managers – Marketing Webinars; The Prospect Nurture System – Marketing Webinars</i></p>	<p><b>Search Engine Optimisation (SEO)</b> 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></p>
<p><b>Get Online Reviews</b>      Build credibility by developing a system to get positive online reviews (e.g. Google, Facebook, etc.) <i>Ask on the Facebook Group</i></p>		

# MARKETING

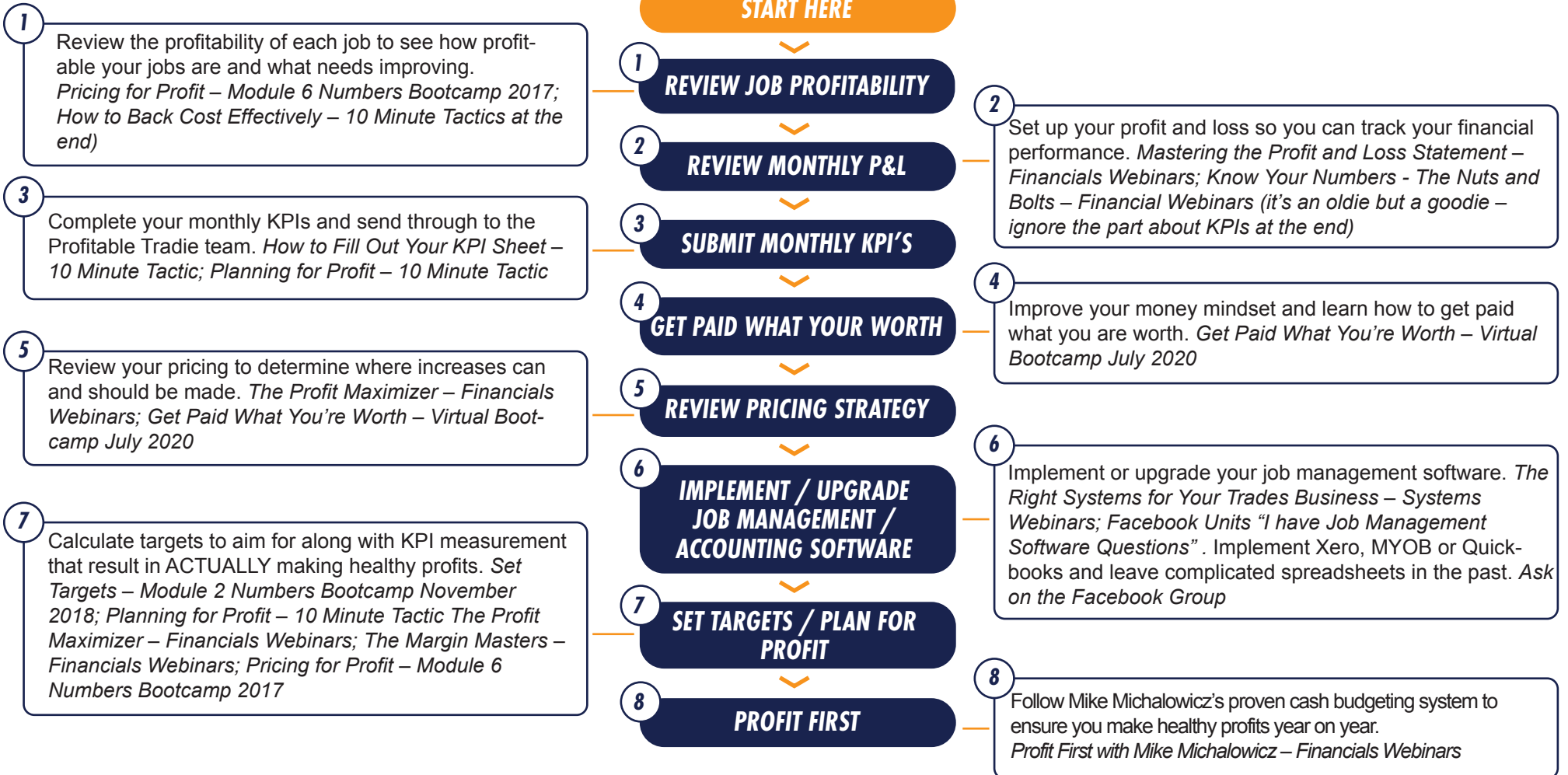
## CHOOSE AS APPROPRIATE

<p><b>Run Ad Words Campaign</b> Drive website traffic and specific web offers using Google AdWords. <i>Josh Moore from Duoplus – Module 6 Marketing Bootcamp 2018</i> <i>Ask on the Facebook Group</i></p>	<p><b>Direct (Lumpy) Mail</b> 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></p>	<p><b>Email Marketing to Your Database</b> Create email offers that generate work quickly. <i>The Email Accelerator – Marketing Webinars</i></p>
<p><b>Create a Prospect Nurture System</b> 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></p>	<p><b>Compile a Customer Database</b> 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></p>	<p><b>Council Consents Lists</b> Sign up to receive a list of consents coming from Council. <i>Ask on the Facebook Group</i></p>
<p><b>List in online directories (e.g. No Cowboys, Gum Tree, Yellow Pages, Trade Me etc.)</b> <i>Ask on the Facebook Group</i></p>	<p><b>Distribute a Flyer Campaign</b> Design and send flyers around the local area. <i>The Flyer Blueprint – Marketing Webinars</i></p>	<p><b>Join a Networking Group (e.g. BNI)</b> Join a networking group to generate referral business in your local community. <i>Ask on the Facebook Group</i></p>
<p><b>LinkedIn Marketing</b> Create a LinkedIn profile and market directly to potential clients (Builders, Property Managers, etc)</p>	<p><b>Grow Facebook Following with Competitions</b> Run competitions and giveaways on Facebook to grow your followers. <i>Spotlight How to Create a Facebook Following – Business of Business Bootcamp 2019</i></p>	<p><b>Hire Marketing Assistant</b> 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</i></p>

# FINANCIALS

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.

START HERE



# FINANCIALS

## CHOOSE AS APPROPRIATE

<p><b>Create Fixed Pricing for Service Work</b>          Create fixed pricing templates (price book) for servicing work.  <i>Fixed Pricing with Doug Brennan – Financial Webinars</i></p>	<p><b>Measure Work in Progress</b>          Calculate your work in progress to ensure you have an accurate monthly gross profit.  <i>Module 5 Telling the Story – Numbers Bootcamp 2018</i></p>	<p><b>Create a workshop stock template</b>          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 –</i></p>
<p><b>Create Van Stock Template</b>          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></p>	<p><b>Implement GPS systems</b>          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></p>	<p><b>Hire an Estimator</b>          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></p>
<p><b>Create Sales &amp; Expenses Budget</b>          Plan full year budget so you have clear targets to assess your P &amp; L against.  <i>Module 2 Set Targets - Numbers Bootcamp 2018</i></p>	<p><b>Use Takeoff Software</b>          Implement software to help with ease and accuracy of quoting and project planning.  <i>Module 5 Telling the Story – Numbers Bootcamp 2018</i></p>	<p><b>Calculate Break-Even</b>          Calculate the break-even sales point for your business.  <i>How to Calculate Break-Even – Financial Webinars</i></p>
<p><b>Upgrade Your Financial KPIs</b>          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></p>	<p><b>Complete Regular Stocktakes</b>          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></p>	<p><b>Hire/Appoint a Pricing Assistant</b>          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></p>
<p><b>Create Pricing Templates/Pre-Built Prices</b>          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></p>		

# FINANCIALS

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

START HERE

1 REVIEW JOB PROFITABILITY

1 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*

2 IMPLEMENT ACCOUNTS RECEIVABLE

2 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*

3 TAKE DEPOSITS

3 Increase the amount of deposit you take before starting a job *Module 7 Nick Kerr – Numbers Bootcamp 2018; Ask on the Facebook group*

4 TERMS OF TRADE

4 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*

5 ENQUIRY SCRIPT

5 Use an enquiry script to qualify potential clients before agreeing to do their work. *Module 2 First Impressions – Sales Bootcamp 2018*

6 SHORTEN PAYMENT TERMS

6 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*

7 MAKE PROGRESS CLAIMS

7 Change payment terms to include regular progress claims rather than stages or on completion *Ask on the Facebook Group*

8 IMPLEMENT WEEKLY CASHFLOW FORECAST

8 Create a weekly cashflow forecast for the next 12 weeks *How to Complete a Cashflow Forecast – 10 Minute Tactic*

# FINANCIALS

## CHOOSE AS APPROPRIATE

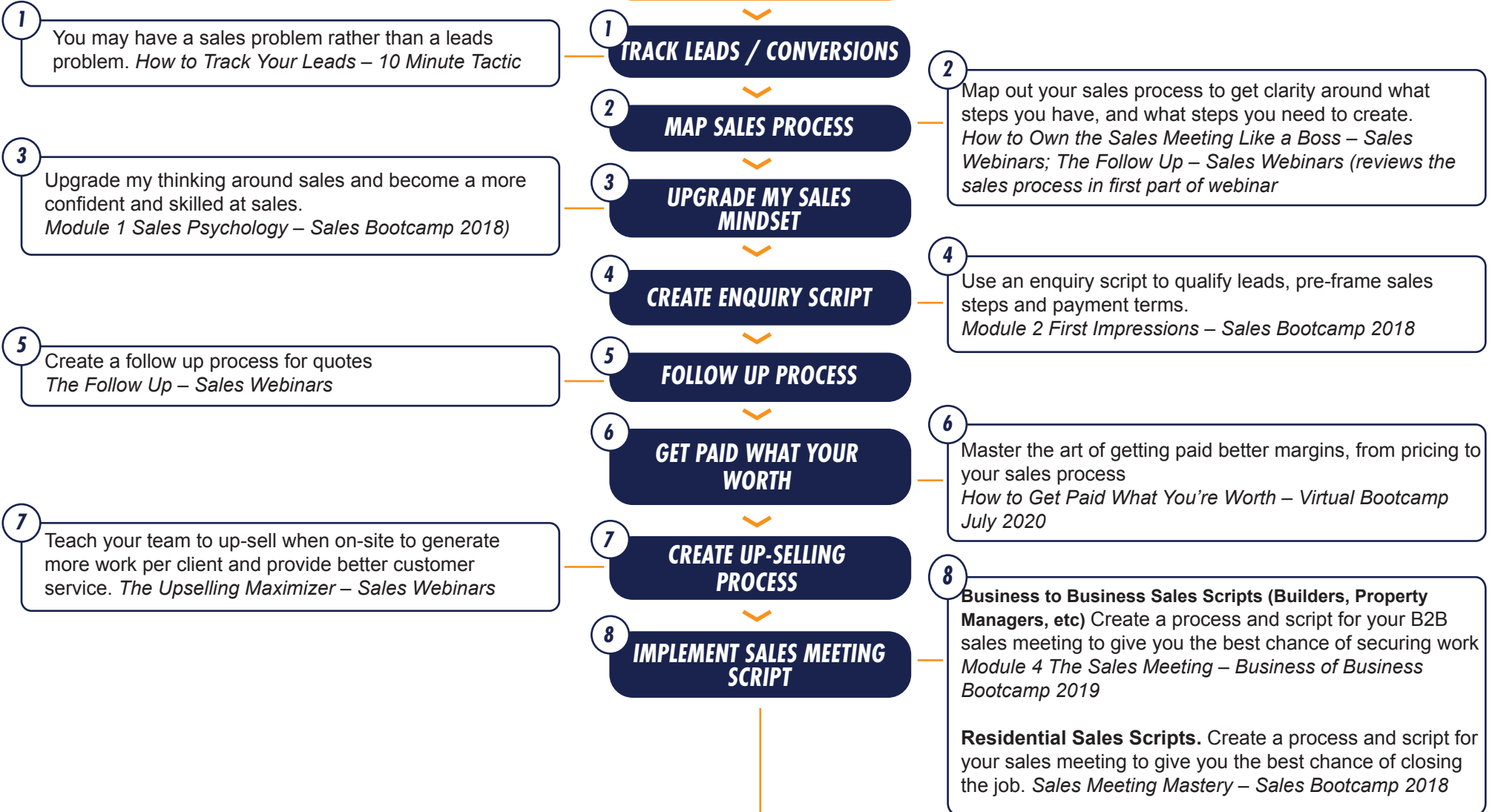
<p><b>Hire Additional Administration Help</b>          Improve the speed of invoicing by getting more help to complete your invoices  <i>How to Hire the Right Staff – Team Webinars;</i>  <i>How to Get Your Office Running Like a Well-Oiled Machine – Systems Webinars</i></p>	<p><b>Toughen Up Asking for Money</b>          Mental roadblock for many people. But crucial to conquer  <i>Live a Bigger Life: Bust Through Mental Roadblocks – Leadership Webinars</i></p>	<p><b>Delegate Invoicing</b>          Train other team members to invoice jobs out  <i>How to Delegate – Virtual Bootcamp March 2020</i></p>
<p><b>Create an Emergency Fund</b>          Set aside at least three months operating expenses as cash reserves  <i>Ask on the Facebook Group</i></p>	<p><b>Deal with Invoicing Complaints</b>          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><b>Negotiate Payment Terms</b>          Negotiate a suitable payment arrangement with for outstanding accounts (e.g. Tax, Merchants etc.)  <i>Ask on the Facebook group</i></p>
<p><b>Review other Cash Expenses</b>          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&amp;L  <i>Mastering the Profit and Loss Statement – Financials Webinars:</i></p>	<p><b>Utilize Your Job Management Software</b>          Ensure accurate and timely completion of job cards  <i>Review the Delivery section of The 5 Drivers;</i>  <i>Ask on the Facebook group</i></p>	<p><b>Provide Finance</b>          Organize 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><b>Overdraft or Line of credit</b>          Set up an overdraft or line of credit with your bank.  <i>Ask on the Facebook group</i></p>		<p><b>Debt Collection Agency</b>          Set up an account with a debt collection agency  <i>Facebook units “I’m having trouble getting paid”</i></p>



# 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.

START HERE



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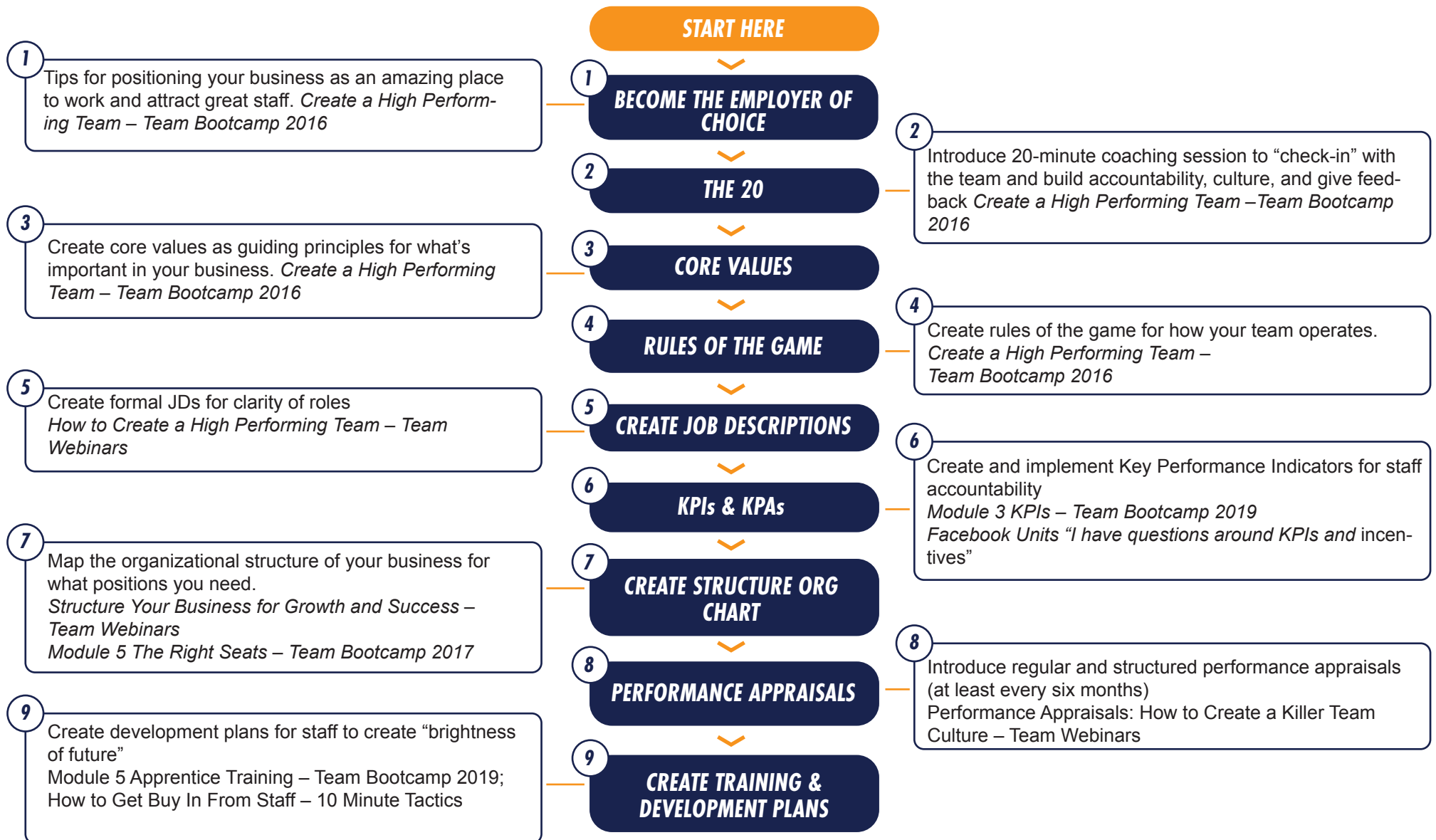
# SALES



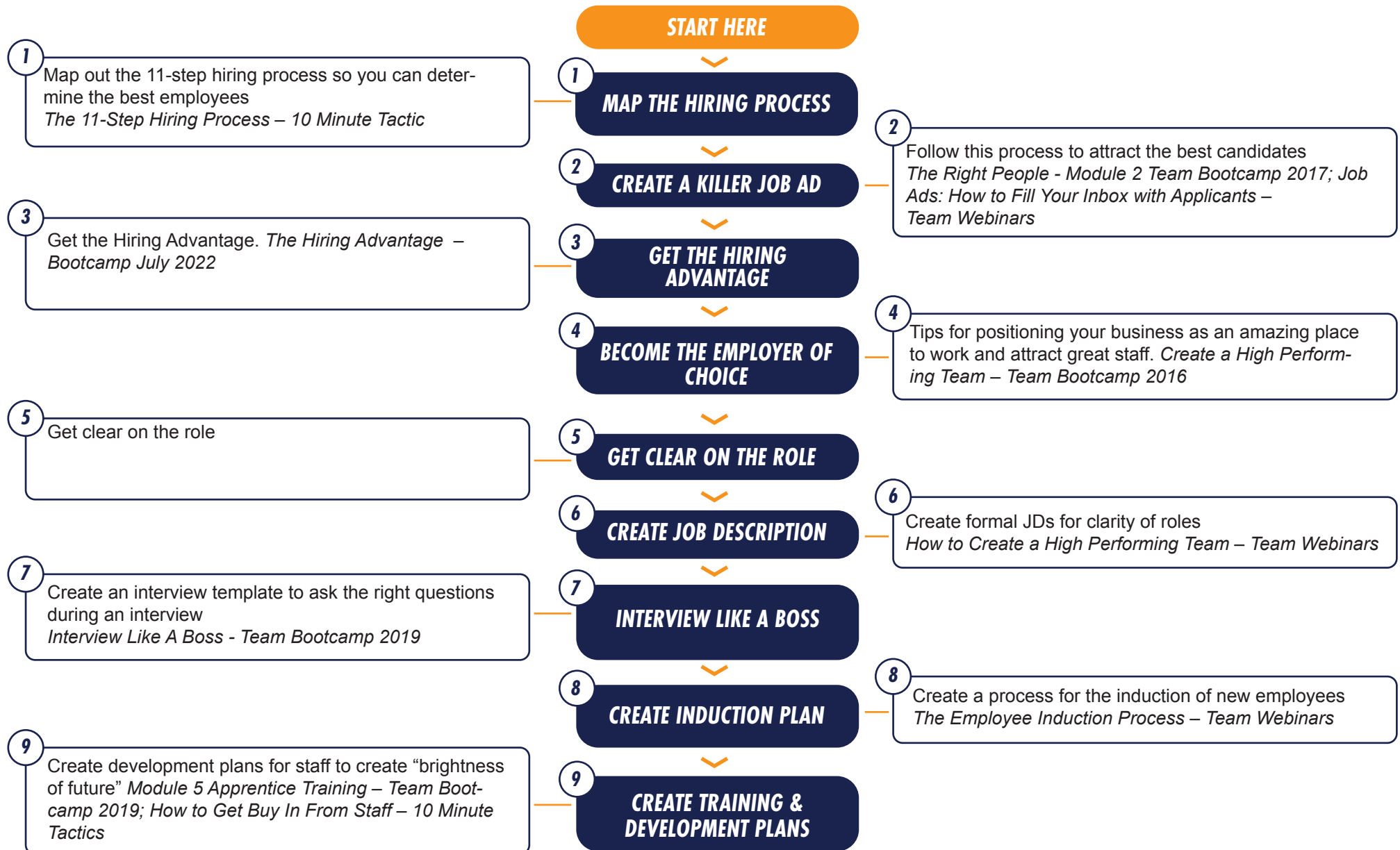
CHOOSE AS APPROPRIATE		
<p><b>Implement a Triage Call</b> For larger jobs use a triage call to qualify leads, pre-frame sales steps and payment terms prior to the site visit <i>How to Get Paid What You're Worth – Virtual Bootcamp July 2020</i></p>	<p><b>Create a “Wow” Marketing Pack</b> Create a package 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></p>	<p><b>Get Testimonials (Video and Written)</b> Capture both written and video testimonials to build trust and authority with potential clients. <i>Review Getting Testimonials Guide – Marketing Resources</i> <i>Ask on the Facebook Group</i></p>
<p><b>Use a Virtual Quoting Process</b> Have a process for giving people quotes virtually by video call. <i>Ask on the Facebook Group</i></p>	<p><b>Use a Quote Request Form</b> 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></p>	<p><b>Use a Virtual Sales Presentation</b> Run sales meetings and present quotes virtually using tools like Zoom. . <i>Ask on the Facebook Group</i></p>
<p><b>Visual Sale Presentation</b> 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></p>	<p><b>Client Questionnaire</b> 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></p>	

# 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.



# TEAM - HIRING

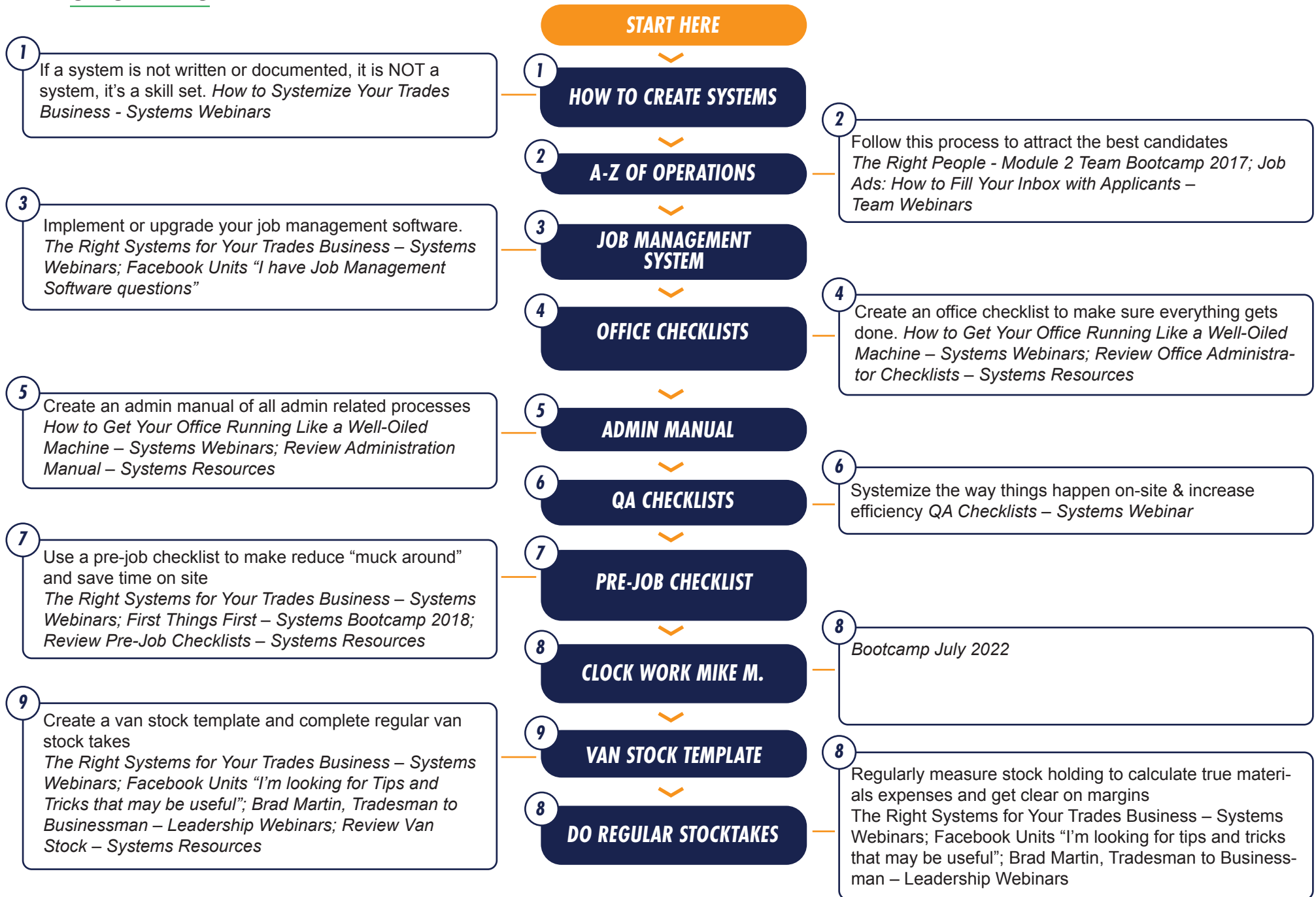


# TEAM

## CHOOSE AS APPROPRIATE

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

# SYSTEMS



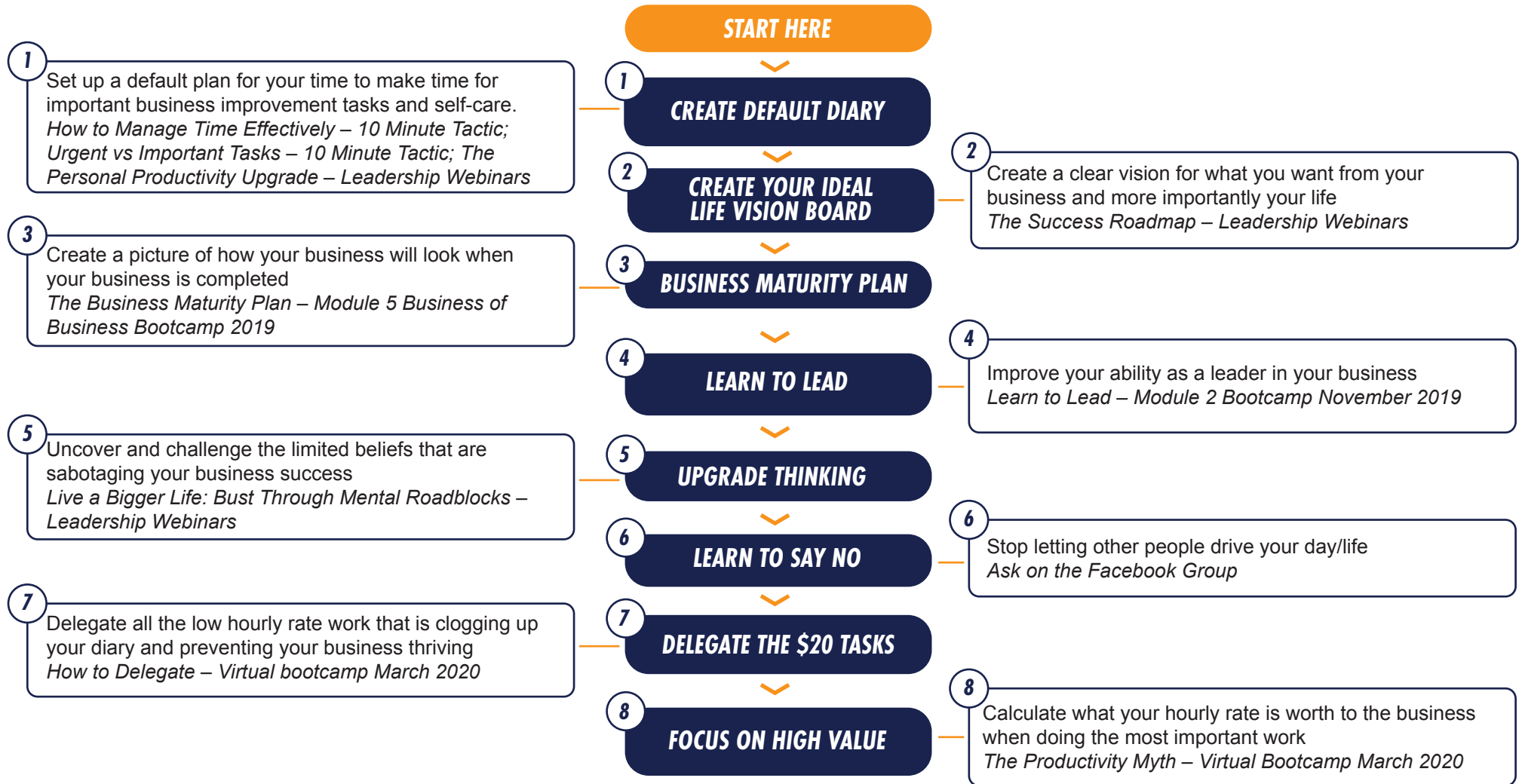
# SYSTEMS

## SYSTEMS - CHOOSE AS APPROPRIATE

<p><b>Personal Goal Setting</b> Engage the team in setting personal goals to build personal motivation Module 4: Team Alignment Day – Team Bootcamp 2019; The Success Roadmap – Leadership Webinars</p>	<p><b>Takeoff Software e.g. Groundplan</b> Implement software to help with ease and accuracy of quoting and project planning <i>Groundplan Takeoff – Virtual Bootcamp July 2020</i></p>	<p><b>Performance Management</b> Have a process for managing bad apples either up, or out Michael Smyth: How to Get Rid of the Bad Apples – Team Webinars</p>
<p><b>Workshop Stock Template</b> 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></p>	<p><b>Use a Quote Request Form</b> 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></p>	<p><b>Apprentice Training Program</b> Structure your apprentice training to gain focus and develop great tradespeople <i>Module 5 Apprentice Training – Team Bootcamp 2019</i></p>
<p><b>Use a Virtual Sales Presentation</b> Run sales meetings and present quotes virtually using tools like Zoom. .  <i>Ask on the Facebook Group</i></p>	<p><b>Create “Belonging” within the team</b> Uniforms, social events, etc create loyalty and a feeling of belonging <i>Ask on the Facebook Group</i></p>	<p><b>Equipment Register</b> Create a register of all equipment and tools <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.





# LEADERSHIP

## CHOOSE AS APPROPRIATE

<p><b>Time Productivity Analysis</b>          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></p>	<p><b>Ask for Help</b>          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></p>	<p><b>Schedule Me Time</b>          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></p>
<p><b>Stop Doing List</b>          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></p>	<p><b>Listen to/Read Business Books</b>          Commit to listening to audiobooks or reading books.  <i>Ask on the Facebook Group</i></p>	<p><b>The Pre-Loaded Year</b>          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></p>
<p><b>Affirmations</b>          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></p>	<p><b>80/20 Rule</b>          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></p>	<p><b>Appoint a General Manager</b>  <i>Ask on the Facebook Group</i></p>
<p><b>Partnerships that Prosper</b>          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></p>		<p><b>Build Inspiration and Motivation</b>          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></p>