Insight Snapshot™

	Insights and Actions		
The Momentum Gameplan	1	2	3
Culture By Design	1	2	3
Client of the Quarter	1	2	3
Mastermind	1	2	3

Insight Snapshot™

	Insights and Actions		
Shaun Quincey	1	2	3
The One Year Business Plan	1	2	3
Spotlight	1	2	3
The 6 Week Planning Cycle	1	2	3

Notes

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The Momentum Gameplan™

Past | Wins and 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

4

5

THE PROFITABLE TRADIE ROADMAP

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

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The Belt Levels

PROFITABLE TRADIE.

NET PROFIT ACCELERATOR
PROFITABLE TRADIE.
SCAN ME

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CULTURE BY DESIGN

– With Phil Smith

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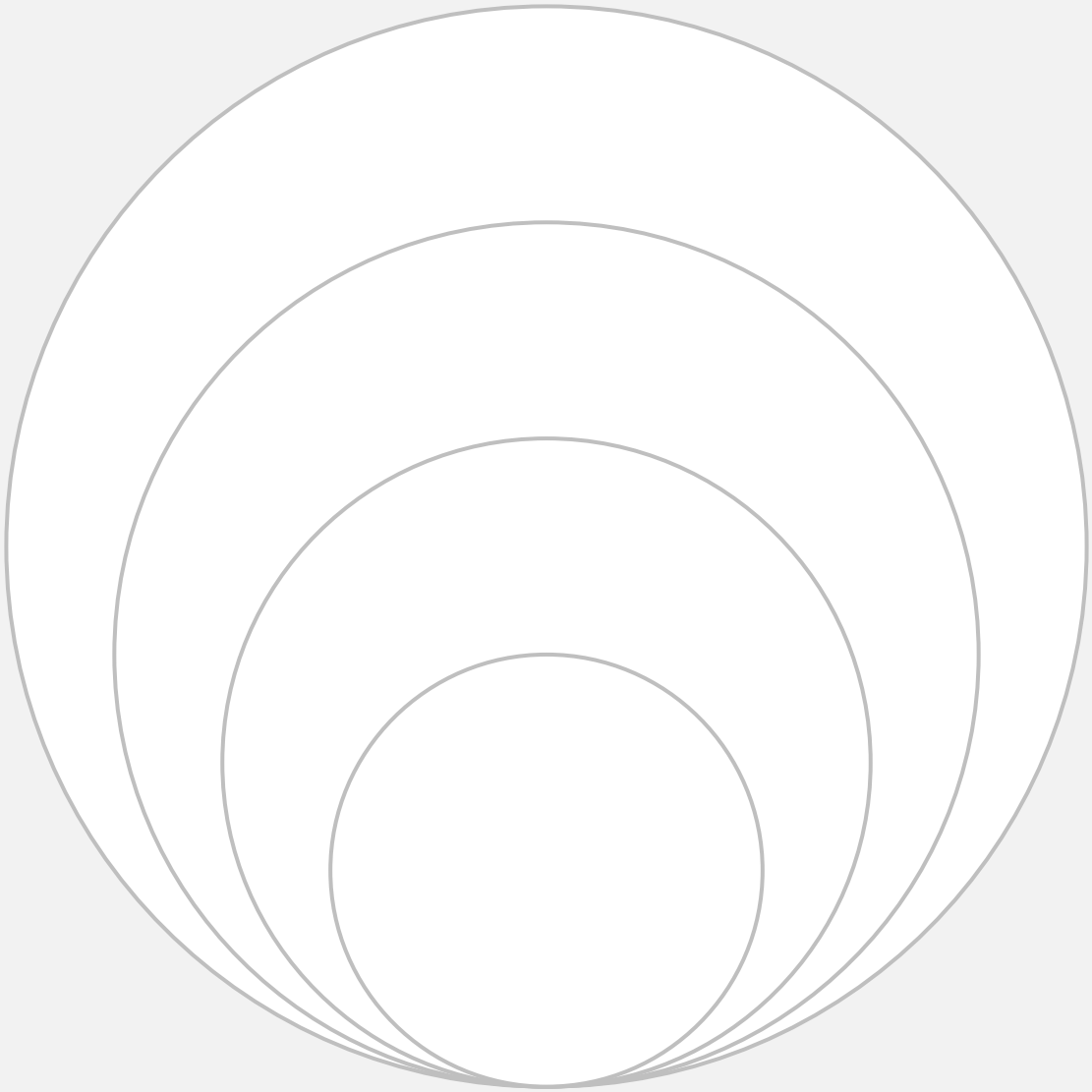
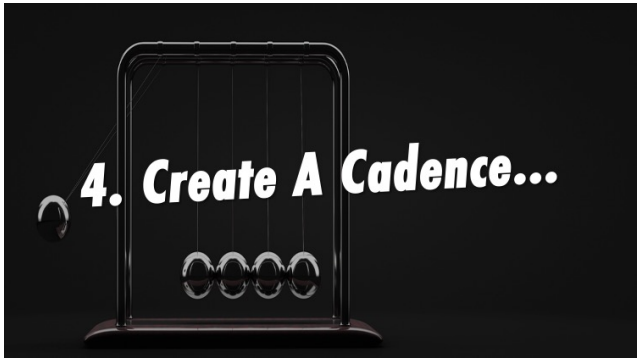
What is Culture?



Notes

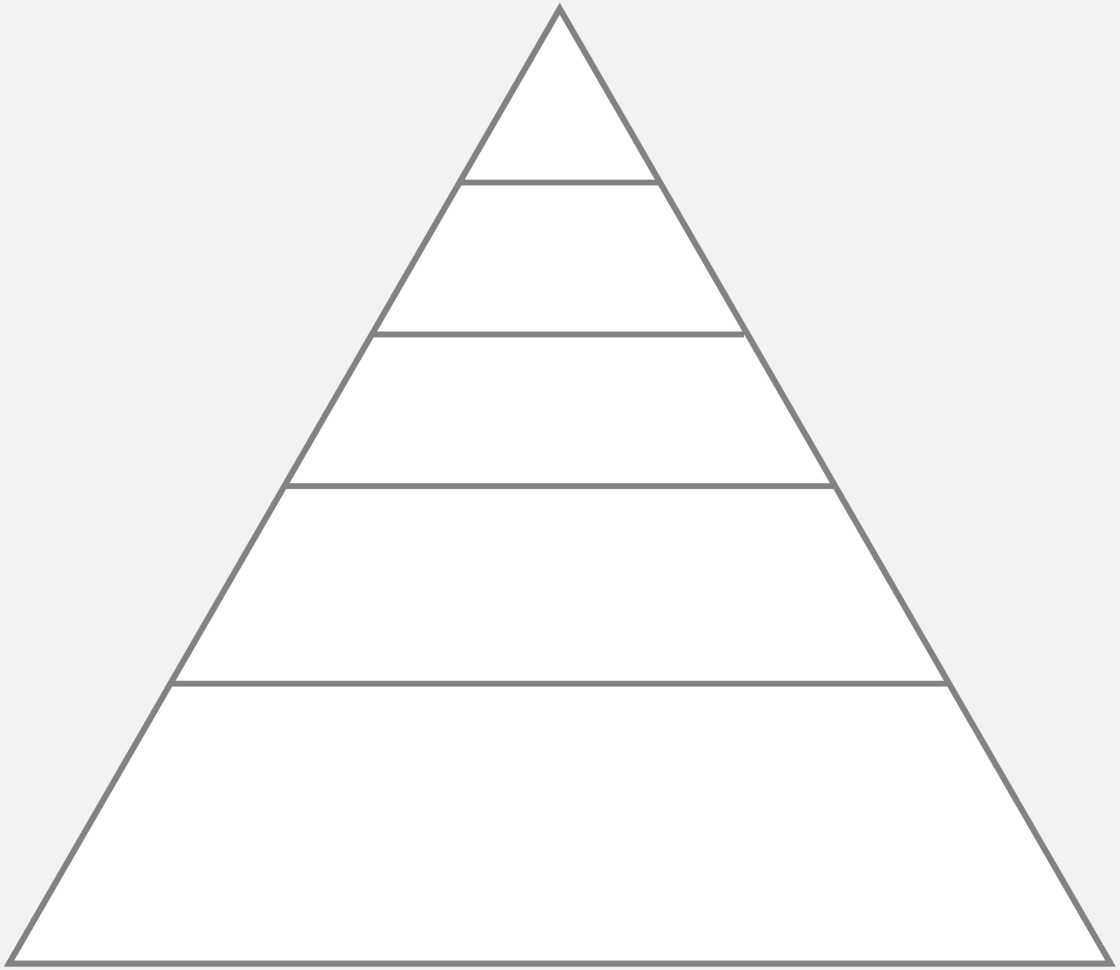
5 Key Principles

3. Centre On Values...


4. Create A Cadence...

5. Develop Heroes...

Core Values Builder



Core Values Builder

HONESTY

INTEGRITY

RESULTS FOCUSED

ACCOUNTABILITY

LEARNING

OWNERSHIP

INNOVATION

SIMPLICITY

COURAGE

ADVENTURE

PERSEVERANCE

CHARITY

PERFORMANCE

FUN

ENJOYMENT

PASSION

HUMILITY

CONSTANT IMPROVEMENT

QUALITY

AUTHENTICITY

DEPENDABILITY

KINDNESS

RESPECT

GIVING BACK

CARE FACTOR

BOLDNESS

DARING

CUSTOMER FOCUSED

HUMOUR

DIVERSITY

TEAMWORK

COMPASSION

COMMITMENT

LOYALTY

OPEN-MINDED

EQUALITY

COMPLIANCE

SUPPORT

COLLABORATION

EFFICIENCY

SERVICE

EXPERTISE

BELONGING

HISTORY

TOLERANCE

ATTENTION TO DETAIL

EXCELLENCE

TRANSPARENCY

GREAT EXPERIENCES

FAMILY FOCUSED

LEGACY

COMMUNITY

COMPETITION

ETHICS

FAIRNESS

WORLD CLASS

HARD WORK

ADVENTUROUS

FRIENDLINESS

Core Values Builder

1.

2.

3.

Notes

Culture Cadence Planner

JAN	FEB	MAR	APR
MAY	JUN	JUL	AUG
SEPT	OCT	NOV	DEC

Notes

CLIENT OF THE QUARTER

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Notes

VOTE FOR CLIENT OF THE QUARTER
PROFITABLE TRADIE.
SCAN ME

MASTERMIND

Notes

The Mastermind

Challenge | My specific challenge is...

Question | My specific question is...

Insights & Actions

Insights & Actions

Insights & Actions

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SHAUN QUINCEY

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THE ONE YEAR BUSINESS PLAN

– With Cam Hill

Notes

5 Key Principles…

3. Know Your Role...

4. Work Harder
On Yourself...

5. Progress Beats
Perfection...

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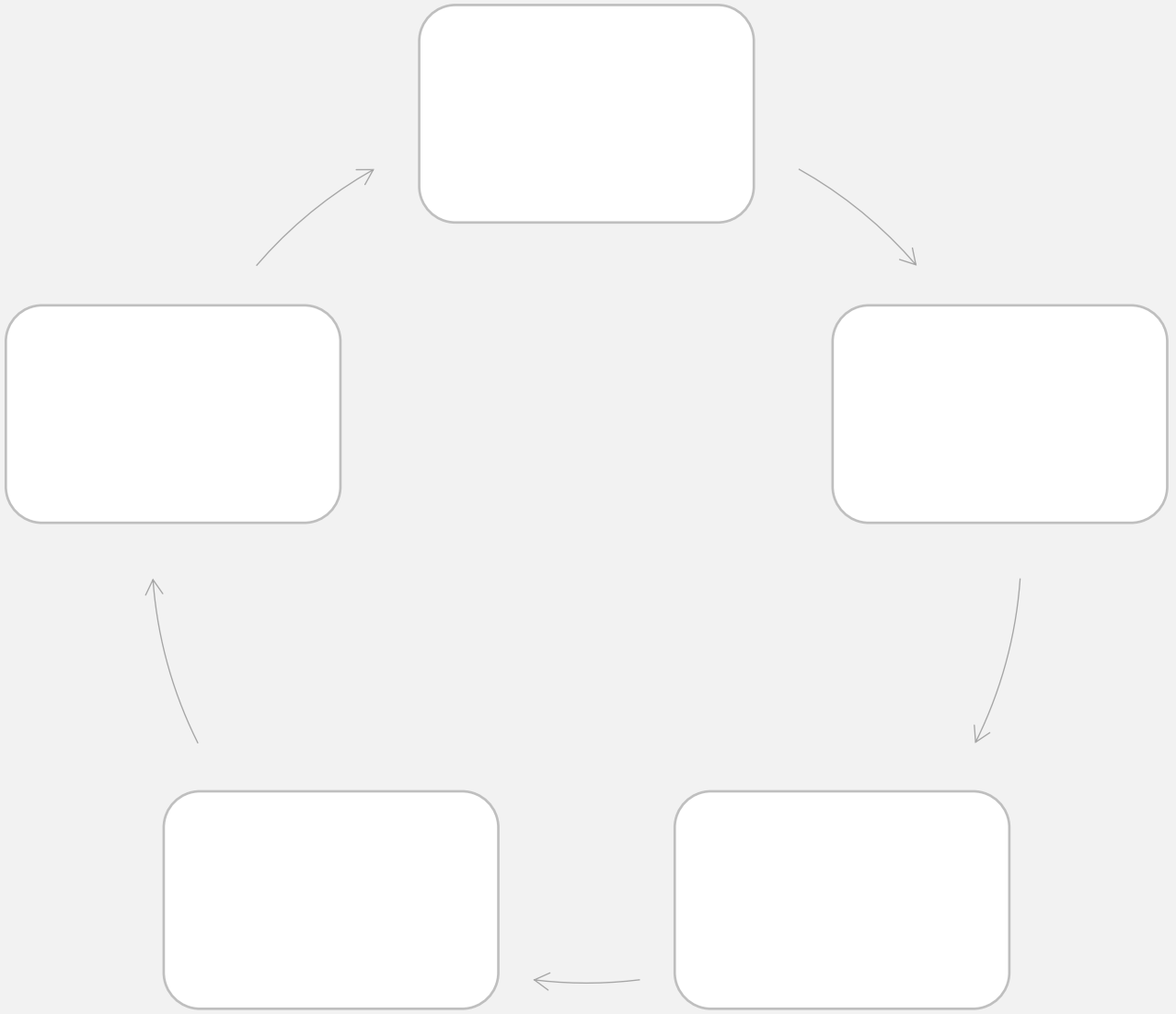
The Planning Cycle



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Set Sales Targets

Your Desired Profit:	
Fixed Costs (Incl. Owners Salary):	
Required Gross Profit (Desired Net Profit + Fixed Costs):	
Target Gross Margin	
Required Annual Sales (Required Gross Profit ÷ Target Gross Margin)	
Required Monthly Sales (Required Annual Sales ÷ 12 Months)	

Calculate # Of Jobs

Enter Average Sale	
Divide Monthly Sales by Average Sale (Jobs Needed Per Month)	

Determine Marketing Needs

Your Conversion Rate	
Required No. of Leads (No. of Jobs ÷ Conversion Rate %)	

1 Year Business Plan

Desired Net Profit	Annual Sales	Monthly Sales	Number Of Jobs Per Month	Number Of Leads Per Month
$	$	$		

Days Worked Per Week	Holidays Taken	Business Task Delegated	Key Roles Hired	Relationships Improved	Hobbies Enjoyed

1 Year Business Plan – Team Structure

Team Structure Calculator

TRADESPEOPLE/TECHS/APPRENTICES

Divide monthly turnover by monthly revenue per tradesperson (approx. $25,000).

Split between tradespeople and apprentices.

SUPERVISORS

(e.g. Operations Manager, Project Manager, Foreman)

Divide # of tradesmen and apprentices by 7.

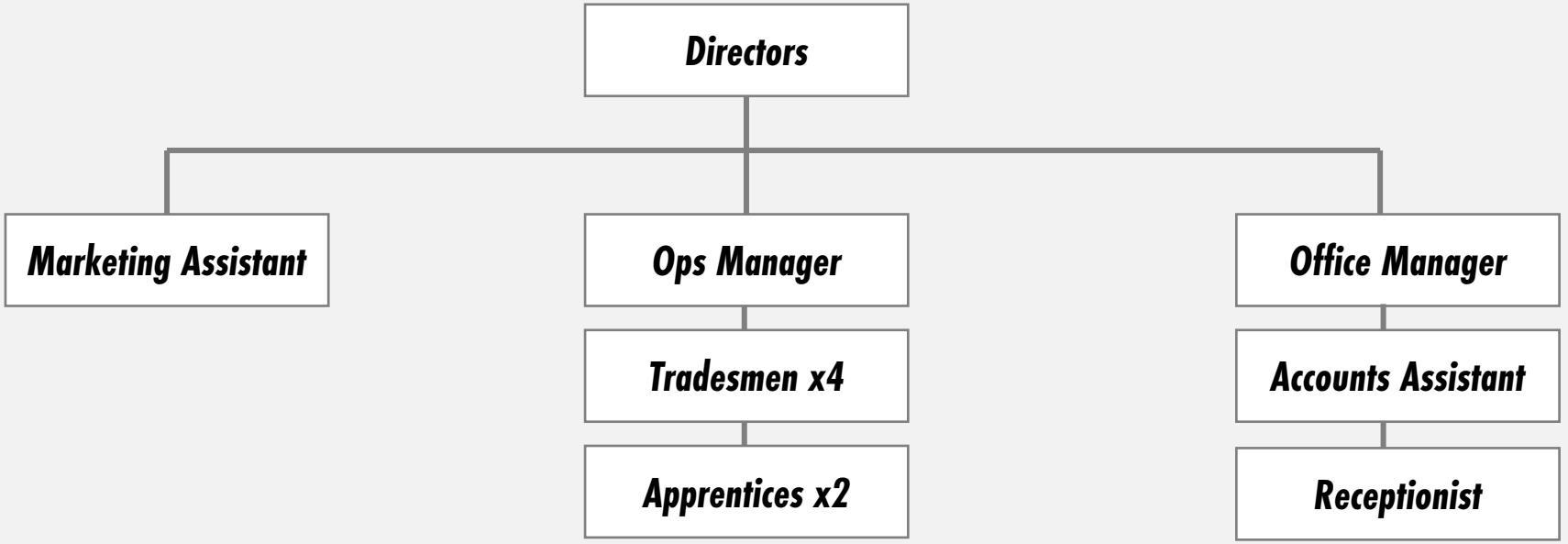
OFFICE STAFF

(e.g. General Manager, Office Manager, Estimator, Accounts Assistant, Receptionist, Marketing Coordinator, etc.)

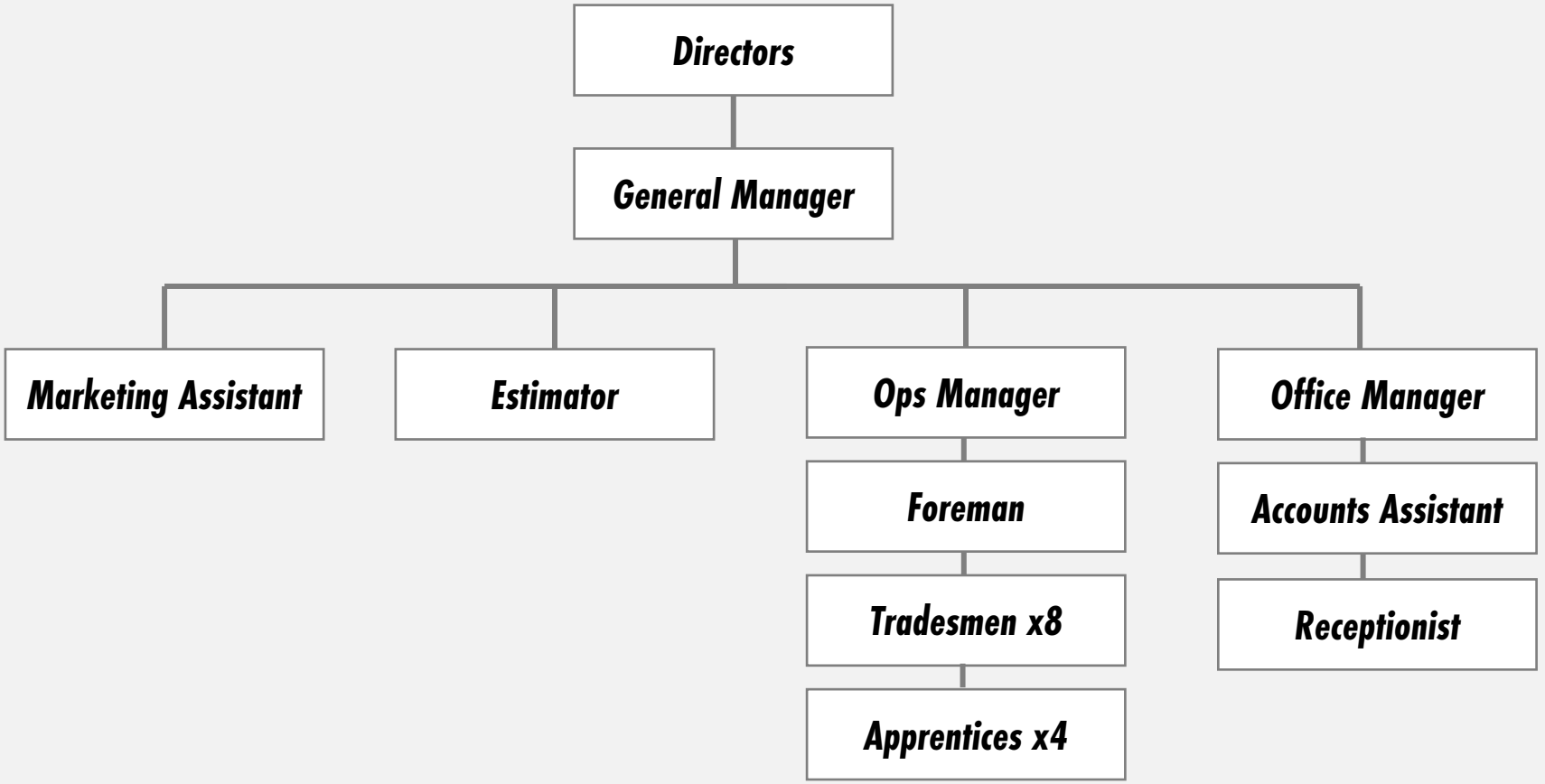
Divide # of people on the tools by 4.

Notes

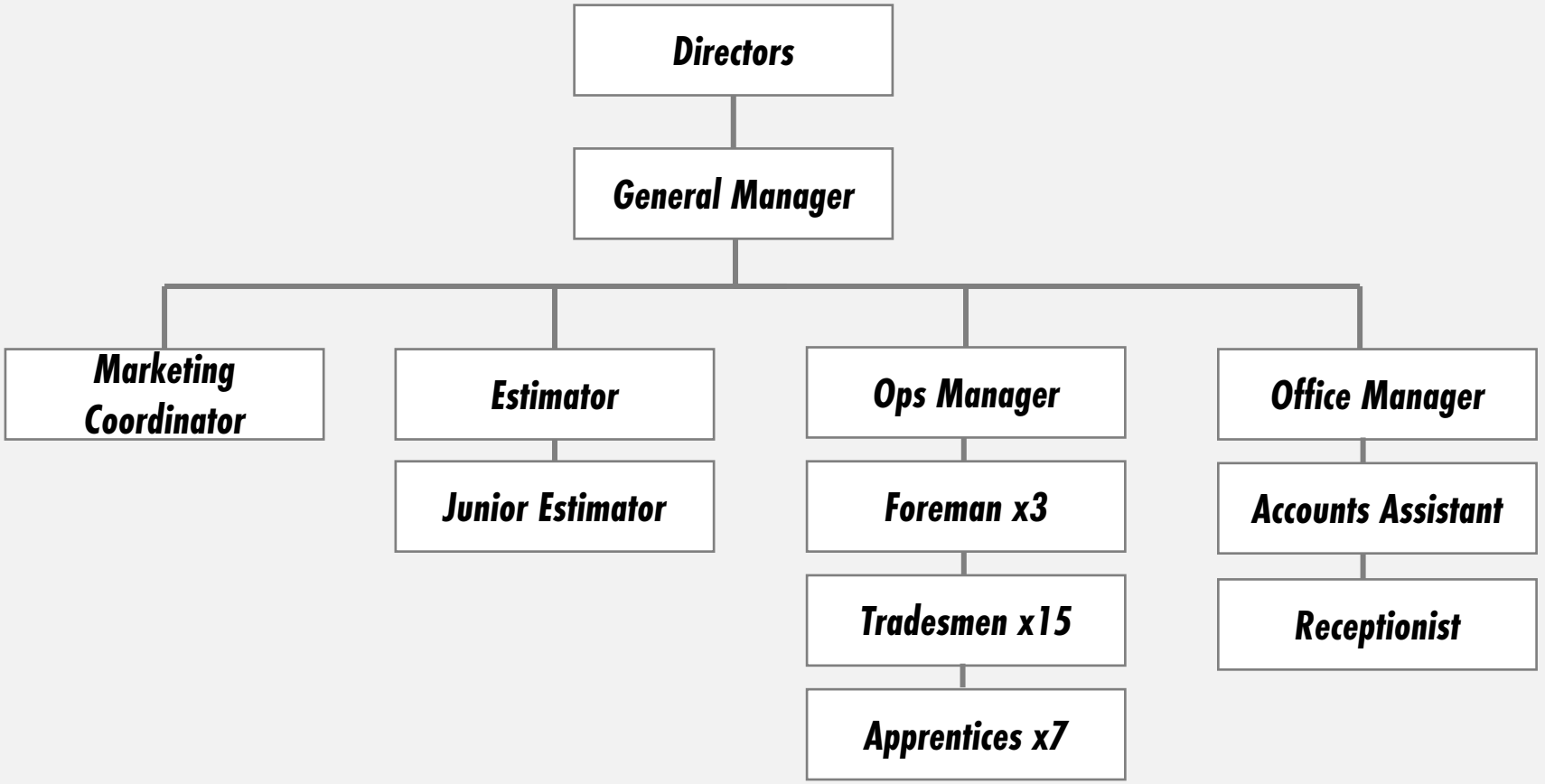
Team Structure Example 1



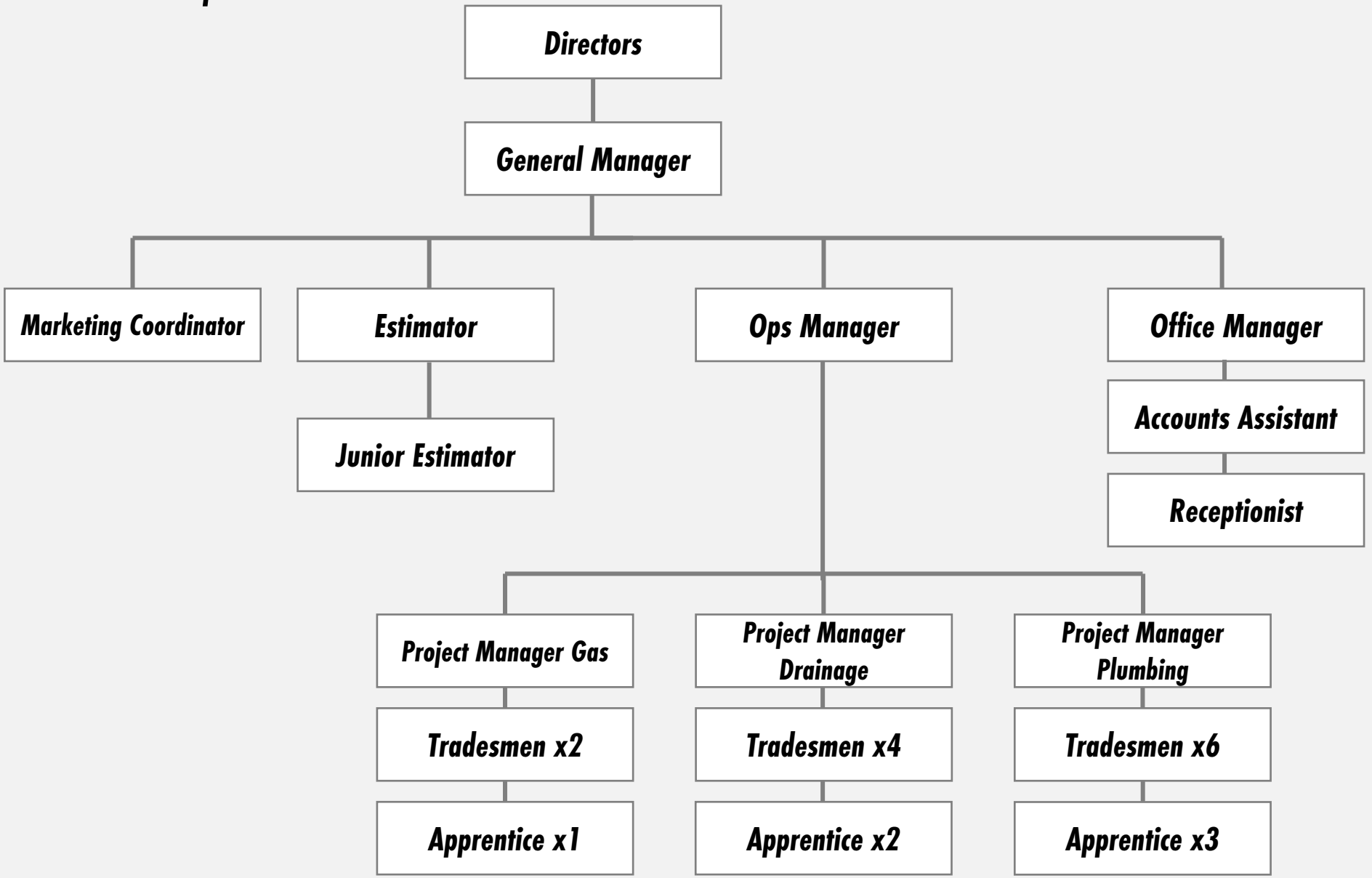
Team Structure Example 2



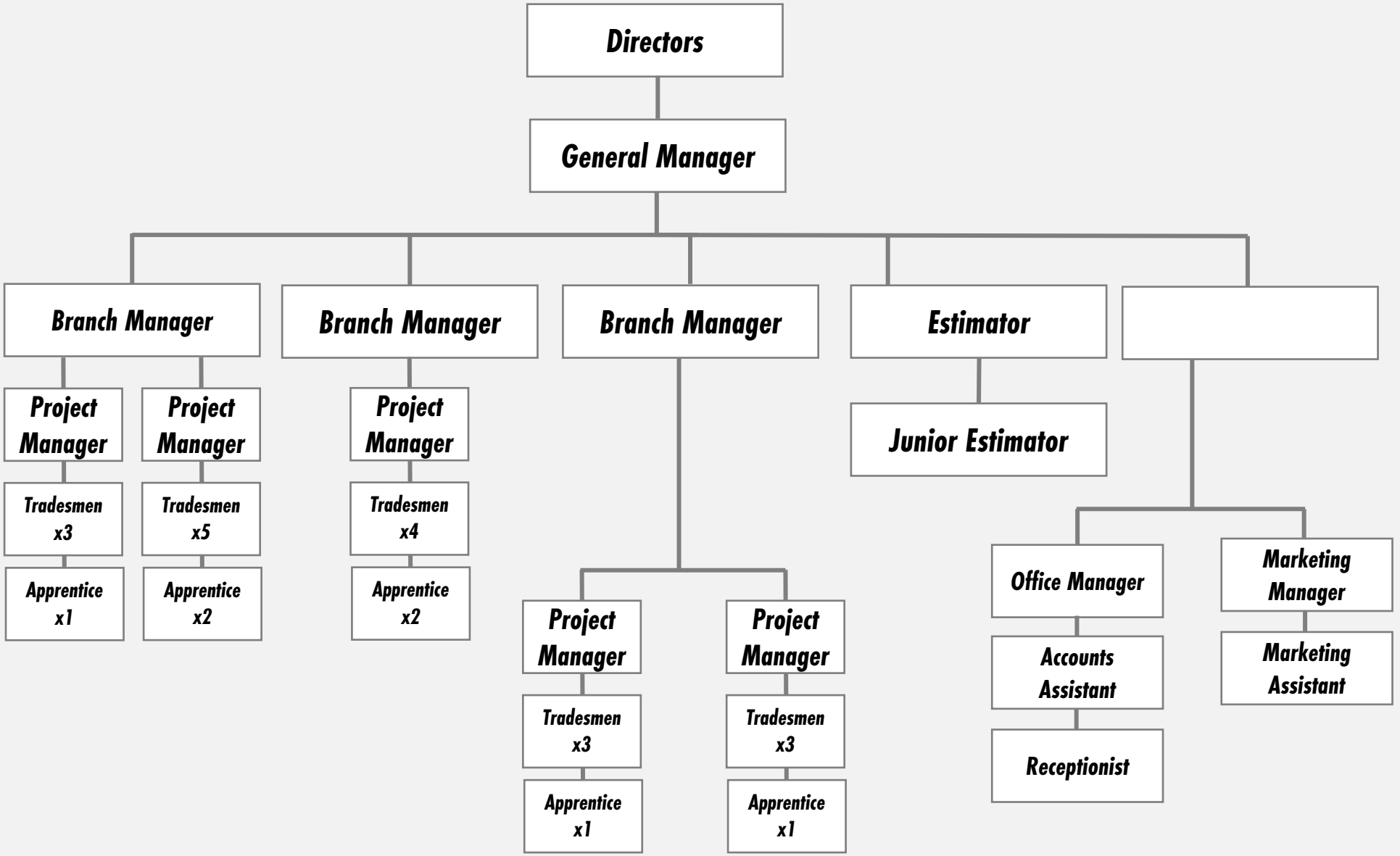
Team Structure Example 3



Team Structure Example 4



Team Structure Example 5



Notes

Delegation Matrix

Tools	Hiring
	Tradesman x2
	Onsite Process

Office Admin	Office Manager
	Admin Manual
	Office Checklist

Team Management	Ops Manager
	KPI's/KPA
	The 20

Pricing	Estimator
	Pricing Templates
	Client Handover

Notes

1 Year Business Plan

Desired Net Profit	Annual Sales	Monthly Sales	Number Of Jobs Per Month	Number Of Leads Per Month
$	$	$		

Actions

Days Worked Per Week	Holidays Taken	Business Task Delegated	Key Roles Hired	Relationships Improved	Hobbies Enjoyed

Actions

1 Year Business Plan

6 Weeks	6 Weeks	6 Weeks	6 Weeks	6 Weeks	6 Weeks
Actions	Actions	Actions	Actions	Actions	Actions

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SPOTLIGHT SESSIONS

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THE 6 WEEK PLANNING SESSION

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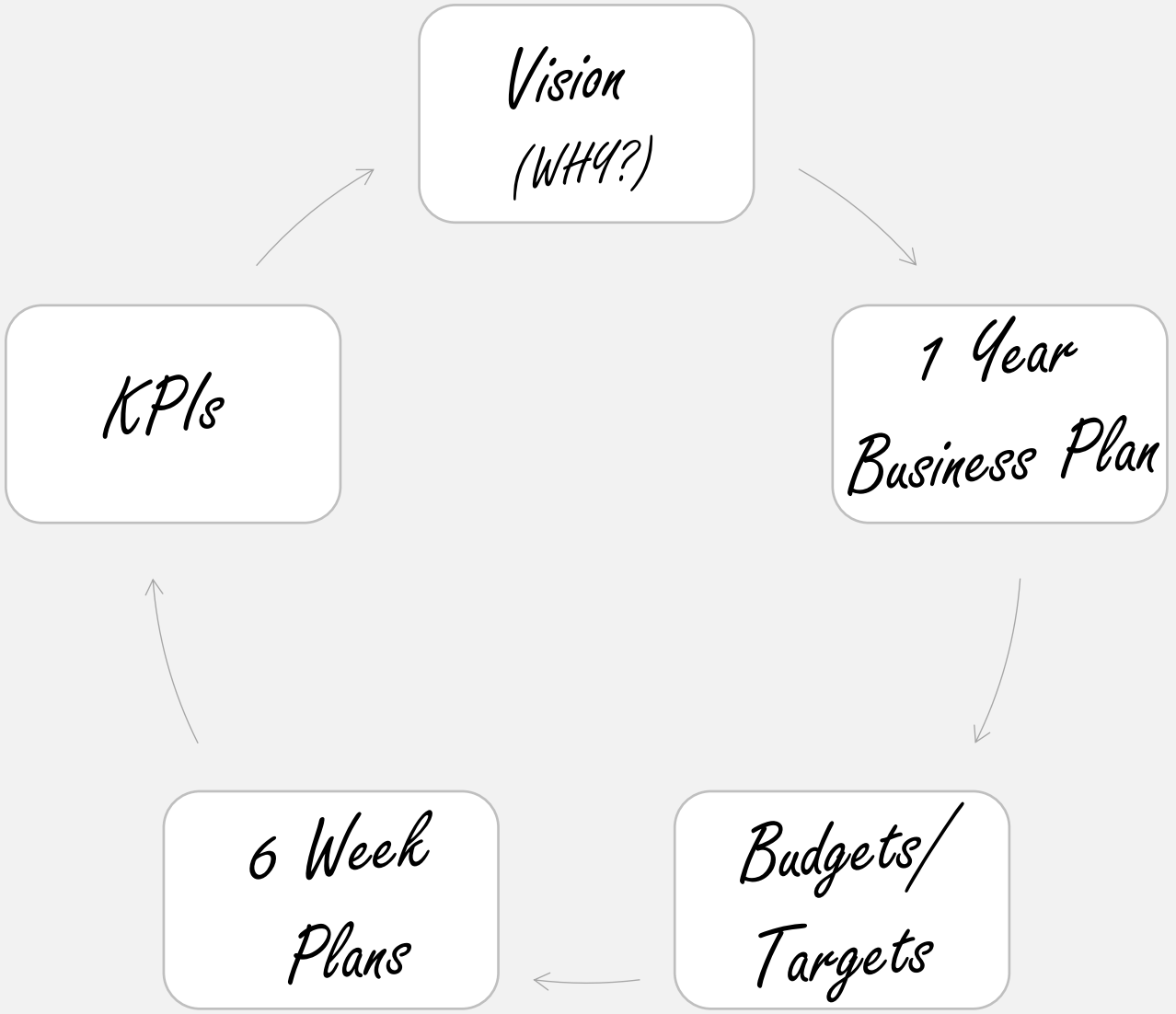
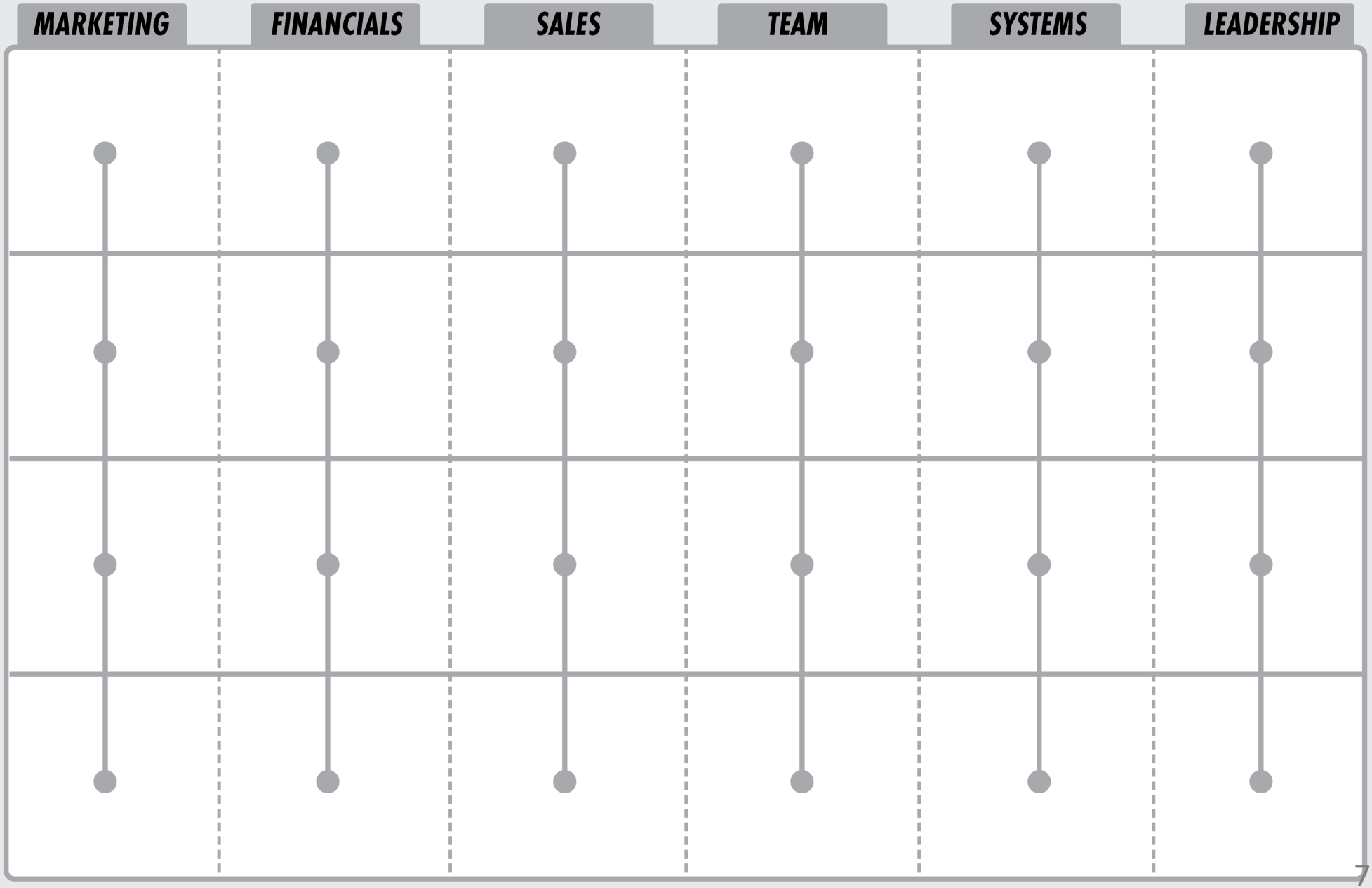
The Planning Cycle



THE 6 DRIVERS



THE PROFITABLE TRADIE ROADMAP

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STARTUP $0-$300K	Decide Target Market Sharpen Key Message Choose Marketing Method	Get Paid Now Fix Payment Terms Filter Job Enquiries		Attract A Players Create Hiring Process Make Irresistable Offer			

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

SCAN ME

	Business to Consumer	Business to Business
SPEED		
FAST	• Google Ads(to landing pages) • Email Marketing • Paid Facebook Ads • Facebook Community Pages • Flyers • Upselling Strategy • Instagram Ads • Referral Program • Online Directories	• Direct/Lumpy Mail • Call Existing Clients • Cold Call Prospects
MEDIUM	• Tweaking Websites to Convert • Newsletter • Yellow Pages • Radio • Signage	• Direct/Lumpy Mail • Prospect Nurturing Strategy • Instagram Relationship Building • LinkedIn Strategy • Tweaking Website to Convert
SLOW	• Search Engine Optimization • Facebook Organic Posting (meet the team etc)	• Direct/Lumpy Mail • Prospect Nurturing Strategy • Joint Ventures

1. **Pick Your Niche / Target Market -** You may have a sales problem rather than a leads problem. *How to Track Your Leads – 10 Minute Tactic; Also see the Conversion Section of 5 Drivers*

2. **Track Leads / Conversions -** You may have a sales problem rather than a leads problem. *How to Track Your Leads – 10 Minute Tactic; Also see the Conversion Section of 5 Drivers*

3. **Create a Unique Selling Proposition (USP) -** Create a point of difference in your market-place. *How to Create a Unique Selling Proposition – 10 Minute Tactic; Review USP templates on membership site – Marketing Resources 10 Minute Tactic*

4. **Create / Update Website -** Create an authority website that shows how professional your business is. *Websites that Convert – Marketing Webinars; Authority Architecture - Module 2 Marketing Bootcamp 2018; Review Example Websites www.2eelectrical.co.nz www.nelsonalarms.co.nz www.jasonbrownplumbing.co.nz www.easwaikato.co.nz www.sharpplumbingservices.co.nz*

5. **Set Up Facebook / Other Social Media Pages** Set up a business Facebook page and create a content plan. *Fishing on Facebook – Marketing Bootcamp 2018*

6. **Create a Customer Guarantee -** Review examples on member websites. *www.2eelectrical.co.nz ; www.nelsonalarms.co.nz*

MARKETING

SCAN ME

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 Online Reviews

Build credibility by developing a system to get positive online reviews (e.g. Google, Facebook, etc.)
Ask on the Facebook Group

MARKETING

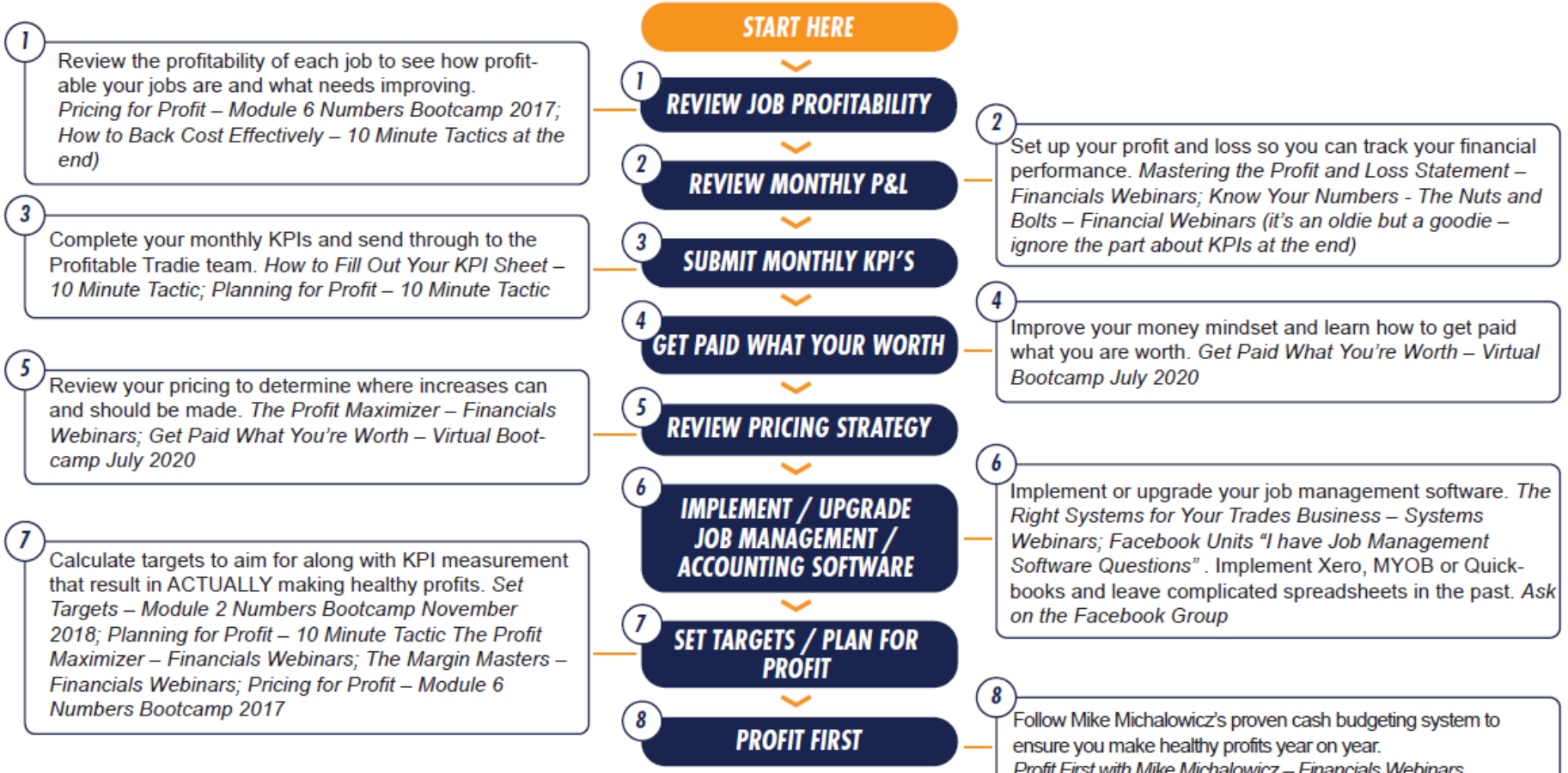
SCAN ME

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.

SCAN ME



FINANCIALS - PROFIT

SCAN ME

CHOOSE AS APPROPRIATE

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 – Leadership 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.

SCAN ME

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 - CASH

SCAN ME

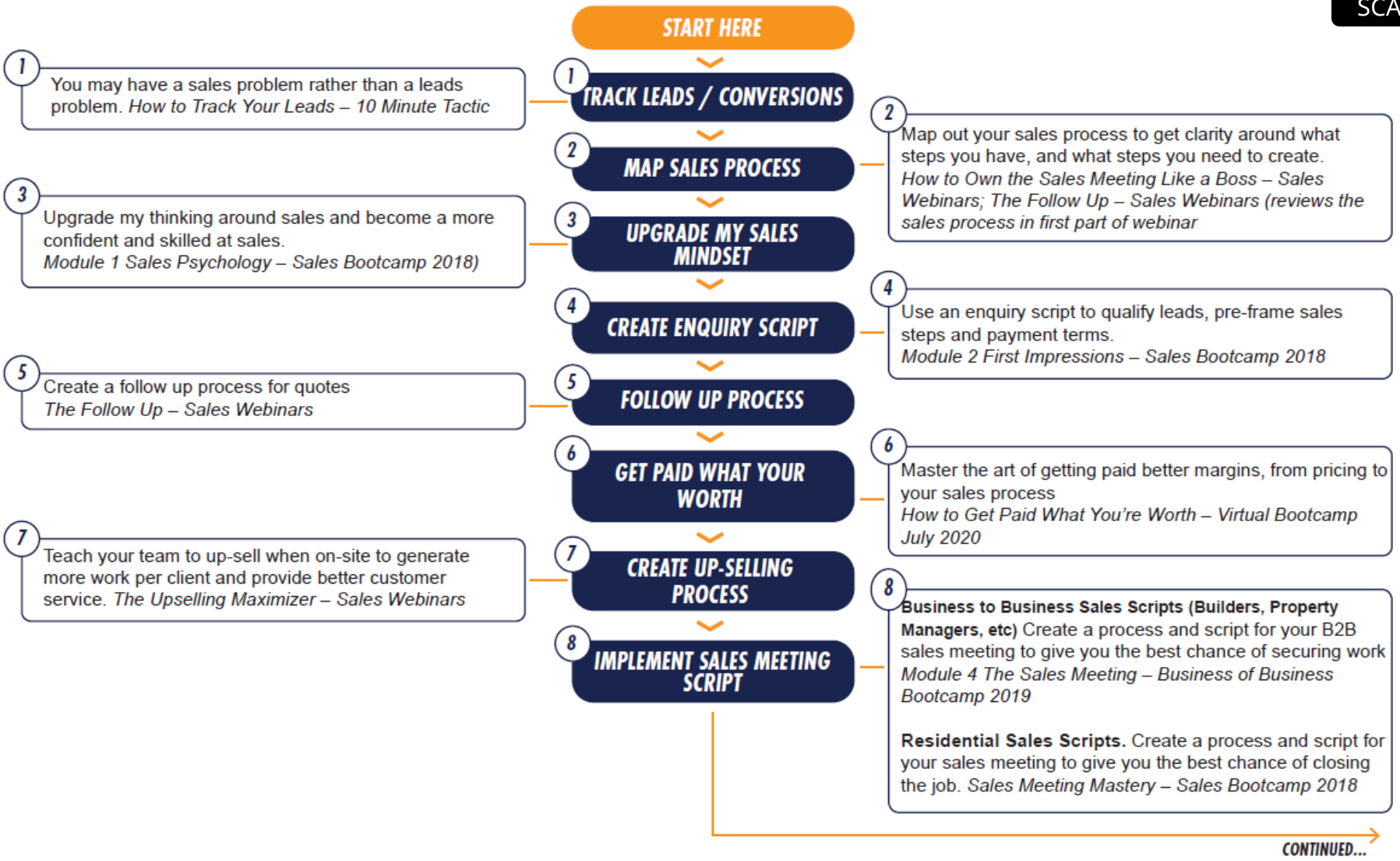
CHOOSE AS APPROPRIATE

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 for Money** Mental roadblock for many people. But crucial to conquer *Live a Bigger Life: Bust Through Mental Roadblocks – Leadership Webinars*	**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 Complaints** Create a script and process to deal with clients who complain about their invoice *How to Deal with Invoicing Complaints – 10 Minute Tactic*	**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 Management Software** Ensure accurate and timely completion of job cards *Review the Delivery section of The 5 Drivers; Ask on the Facebook group*	**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*		**Debt Collection Agency** Set up an account with a debt collection agency *Facebook units "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.

SCAN ME



SALES

SCAN ME

CONTINUED

9 CREATE A PERSUASIVE QUOTE

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

10 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*

11 PROSPECT NURTURE SYSTEM

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

CHOOSE AS APPROPRIATE

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

Create a "Wow" Marketing Pack
Create a package to "wow" potential clients during your sales process and stand out as an authority
Marketing Business to Business – Marketing Webinars; The Company Profile – Sales Webinars

Get Testimonials (Video and 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

Use a Virtual Quoting Process
Have a process for giving people quotes virtually by video call.
Ask on the Facebook Group

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

Use a Virtual Sales Presentation
Run sales meetings and present quotes virtually using tools like Zoom. .
Ask on the Facebook Group

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 Questionnaire
Use a questionnaire to get client involved in sales process and build commitment to your solution.
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.

SCAN ME

START HERE

1. **BECOME THE EMPLOYER OF CHOICE**
   1. Tips for positioning your business as an amazing place to work and attract great staff. *Create a High Performing Team – Team Bootcamp 2016*
2. **THE 20**
   2. 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*
3. **CORE VALUES**
   3. Create core values as guiding principles for what's important in your business. *Create a High Performing Team – Team Bootcamp 2016*
4. **RULES OF THE GAME**
   4. Create rules of the game for how your team operates. *Create a High Performing Team – Team Bootcamp 2016*
5. **CREATE JOB DESCRIPTIONS**
   5. Create formal JDs for clarity of roles *How to Create a High Performing Team – Team Webinars*
6. **KPIs & KPAs**
   6. Create and implement Key Performance Indicators for staff accountability *Module 3 KPIs – Team Bootcamp 2019* *Facebook Units "I have questions around KPIs and* incentives"
7. **CREATE STRUCTURE ORG CHART**
   7. 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*
8. **PERFORMANCE APPRAISALS**
   8. Introduce regular and structured performance appraisals (at least every six months) Performance Appraisals: How to Create a Killer Team Culture – Team Webinars
9. **CREATE TRAINING & DEVELOPMENT PLANS**
   9. 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

TEAM - HIRING

SCAN ME

START HERE

1. **MAP THE HIRING PROCESS**
   1. Map out the 11-step hiring process so you can determine the best employees
   The 11-Step Hiring Process – 10 Minute Tactic
2. **CREATE A KILLER JOB AD**
   2. 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
3. **GET THE HIRING ADVANTAGE**
   3. Get the Hiring Advantage. *The Hiring Advantage – Bootcamp July 2022*
4. **BECOME THE EMPLOYER OF CHOICE**
   4. Tips for positioning your business as an amazing place to work and attract great staff. *Create a High Performing Team – Team Bootcamp 2016*
5. **GET CLEAR ON THE ROLE**
   5. Get clear on the role
6. **CREATE JOB DESCRIPTION**
   6. Create formal JDs for clarity of roles
   How to Create a High Performing Team – Team Webinars
7. **INTERVIEW LIKE A BOSS**
   7. Create an interview template to ask the right questions during an interview
   Interview Like A Boss - Team Bootcamp 2019
8. **CREATE INDUCTION PLAN**
   8. Create a process for the induction of new employees
   The Employee Induction Process – Team Webinars
9. **CREATE TRAINING & DEVELOPMENT PLANS**
   9. 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*

TEAM

SCAN ME

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

SCAN ME

START HERE

1. **HOW TO CREATE SYSTEMS**
   1. 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*
2. **A-Z OF OPERATIONS**
   2. 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*
3. **JOB MANAGEMENT SYSTEM**
   3. Implement or upgrade your job management software. *The Right Systems for Your Trades Business – Systems Webinars; Facebook Units "I have Job Management Software questions"*
4. **OFFICE CHECKLISTS**
   4. 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*
5. **ADMIN MANUAL**
   5. 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*
6. **QA CHECKLISTS**
   6. Systemize the way things happen on-site & increase efficiency *QA Checklists – Systems Webinar*
7. **PRE-JOB CHECKLIST**
   7. Use a pre-job checklist to make reduce "muck around" and save time on site *The Right Systems for Your Trades Business – Systems Webinars; First Things First – Systems Bootcamp 2018; Review Pre-Job Checklists – Systems Resources*
8. **CLOCK WORK MIKE M.**
   8. *Bootcamp July 2022*
9. **VAN STOCK TEMPLATE**
   9. 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 – Leadership Webinars; Review Van Stock – Systems Resources*
8. **DO REGULAR STOCKTAKES**
   8. 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

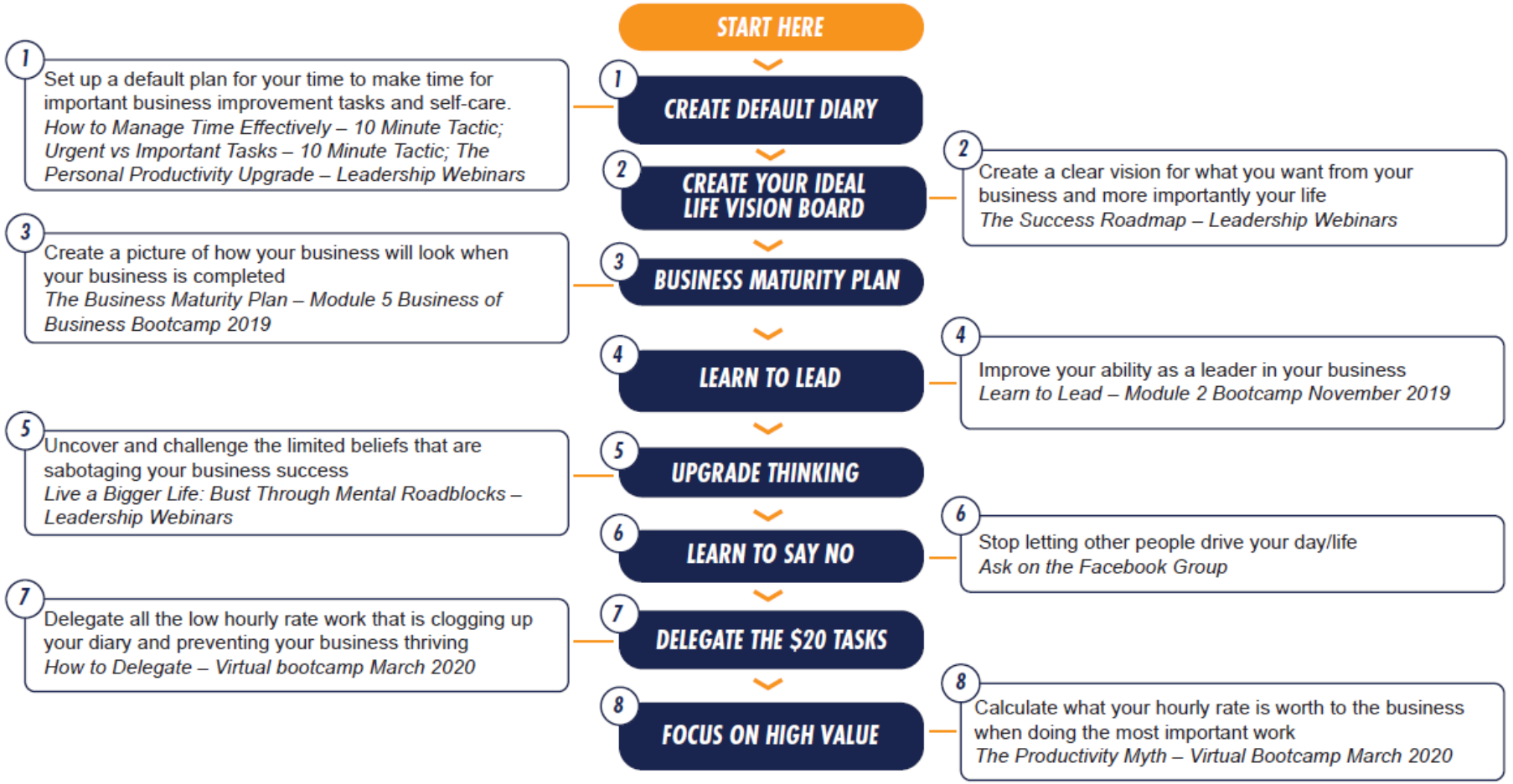
SCAN ME

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	**Takeoff Software e.g. Groundplan** Implement software to help with ease and accuracy of quoting and project planning *Groundplan Takeoff – Virtual Bootcamp July 2020*	**Performance Management** Have a process for managing bad apples either up, or out Michael Smyth: How to Get Rid of the Bad Apples – Team Webinars
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.

SCAN ME



LEADERSHIP

SCAN ME

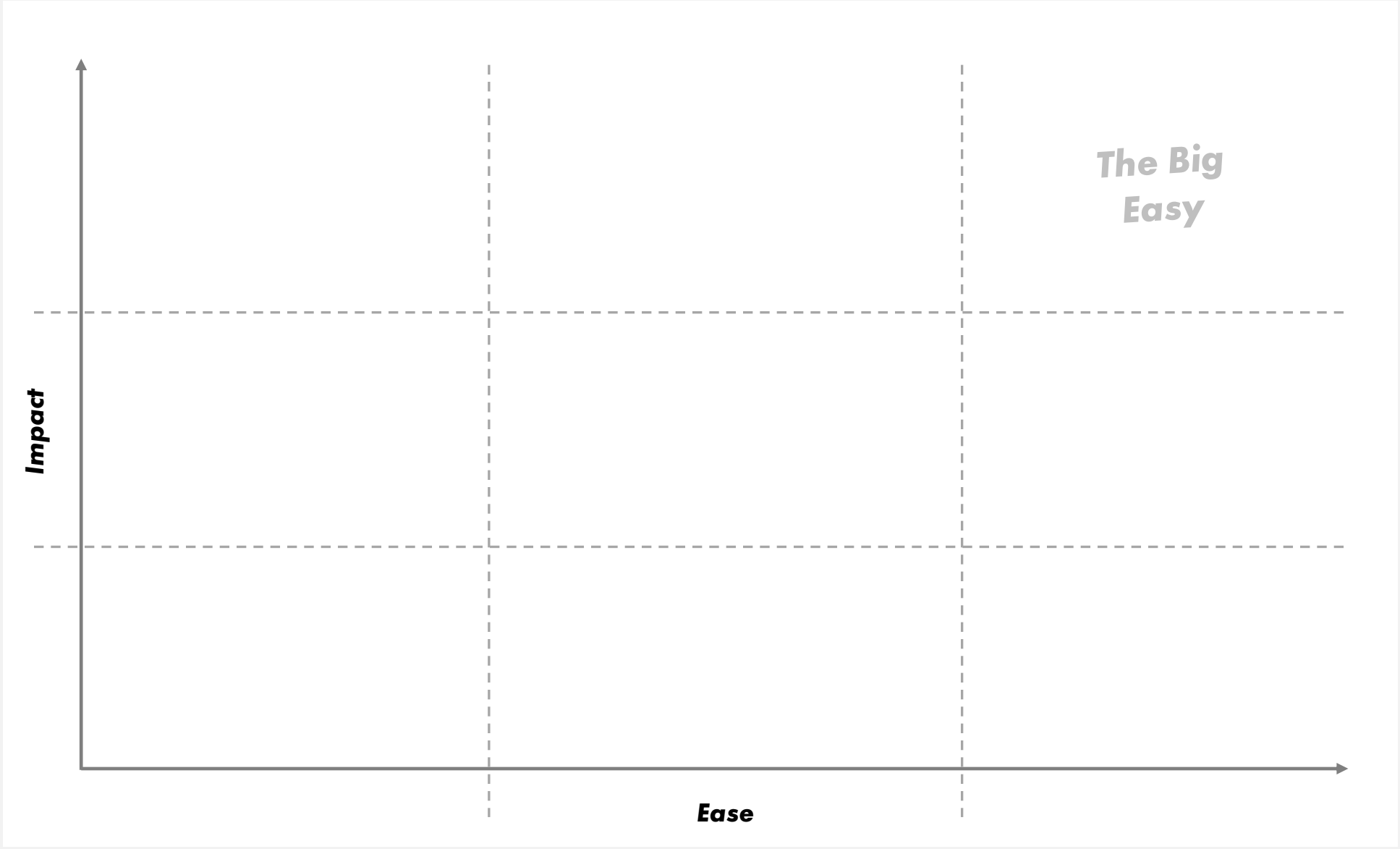
CHOOSE AS APPROPRIATE

Time Productivity Analysis Measure how you are currently spending your time so you can see what the "time sucks" are *The Personal Productivity Upgrade – Leadership 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 Webinars; 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 Motivation** Review 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*

Notes

The Betting Table



Notes

The Compass

Cycle Begins_____ Cycle Ends_____

Motivation	Carrot	Stick

	Strategy Description	11-Nov	18-Nov	25-Nov	2-Dec	9-Dec	16-Dec	23-Dec	13-Jan	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:**

Notes

Notes

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?

Webinar to Watch

Resource(s) to use

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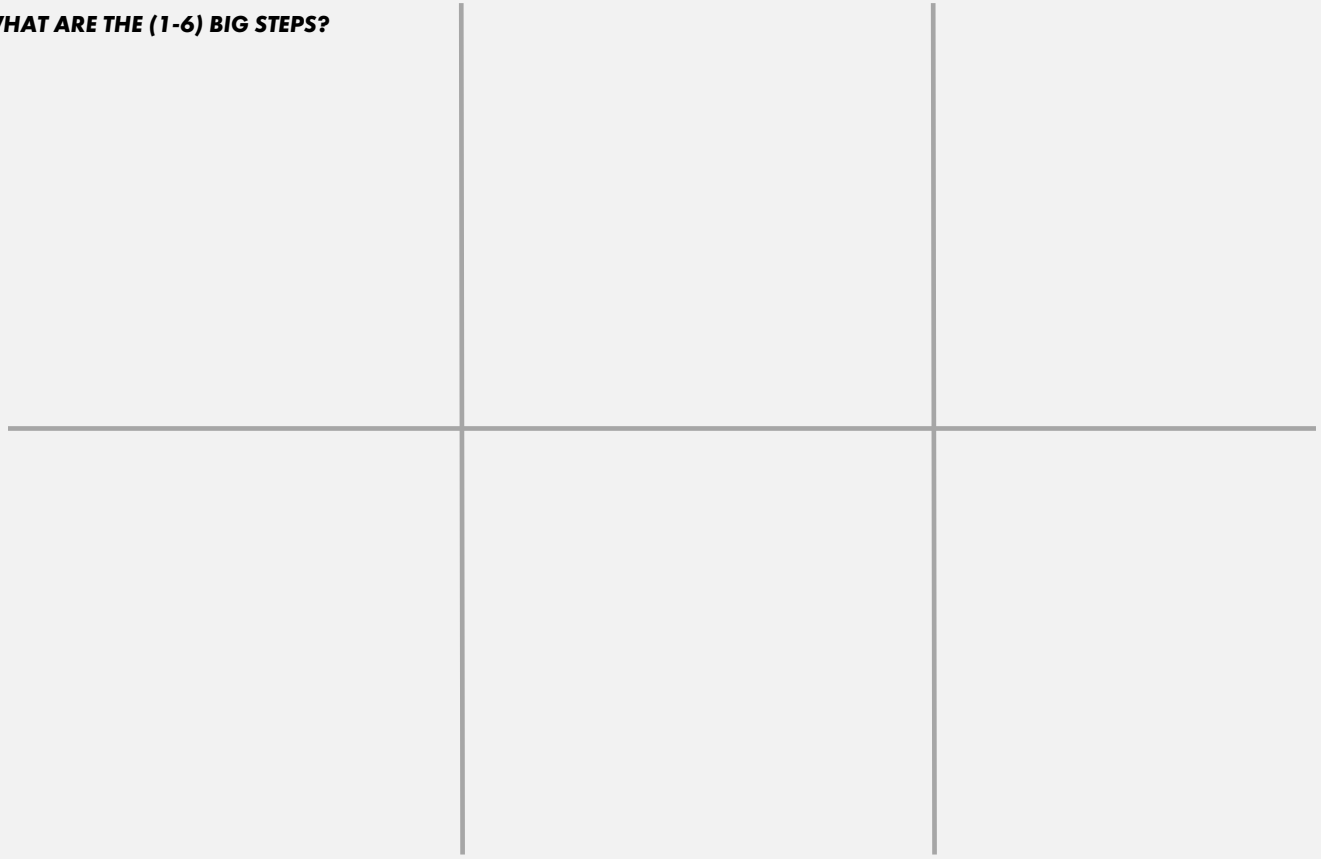

Webinar to Watch

Resource(s) to use

TRAFFIC LIGHT CHECK-IN
PROFITABLE TRADIE.
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