

***The Momentum
Gameplan***

1

2

3

***Mastering The Art Of
Sales***

1

2

3

Client of the Quarter

1

2

3

Mastermind

1

2

3

Cam Calkoen

1

2

3

**Crushing the Difficult
Conversations**

1

2

3

Spotlight

1

2

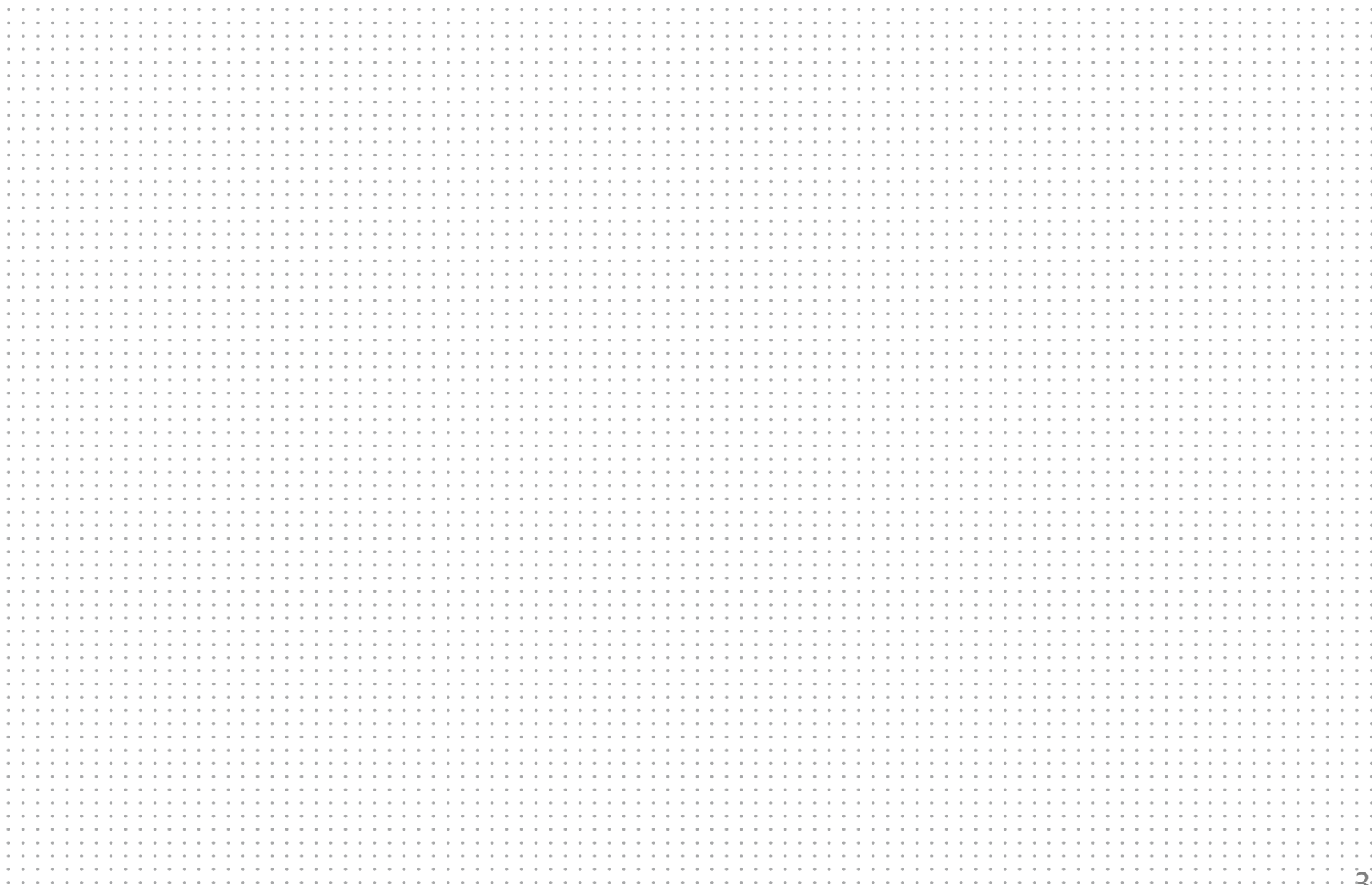
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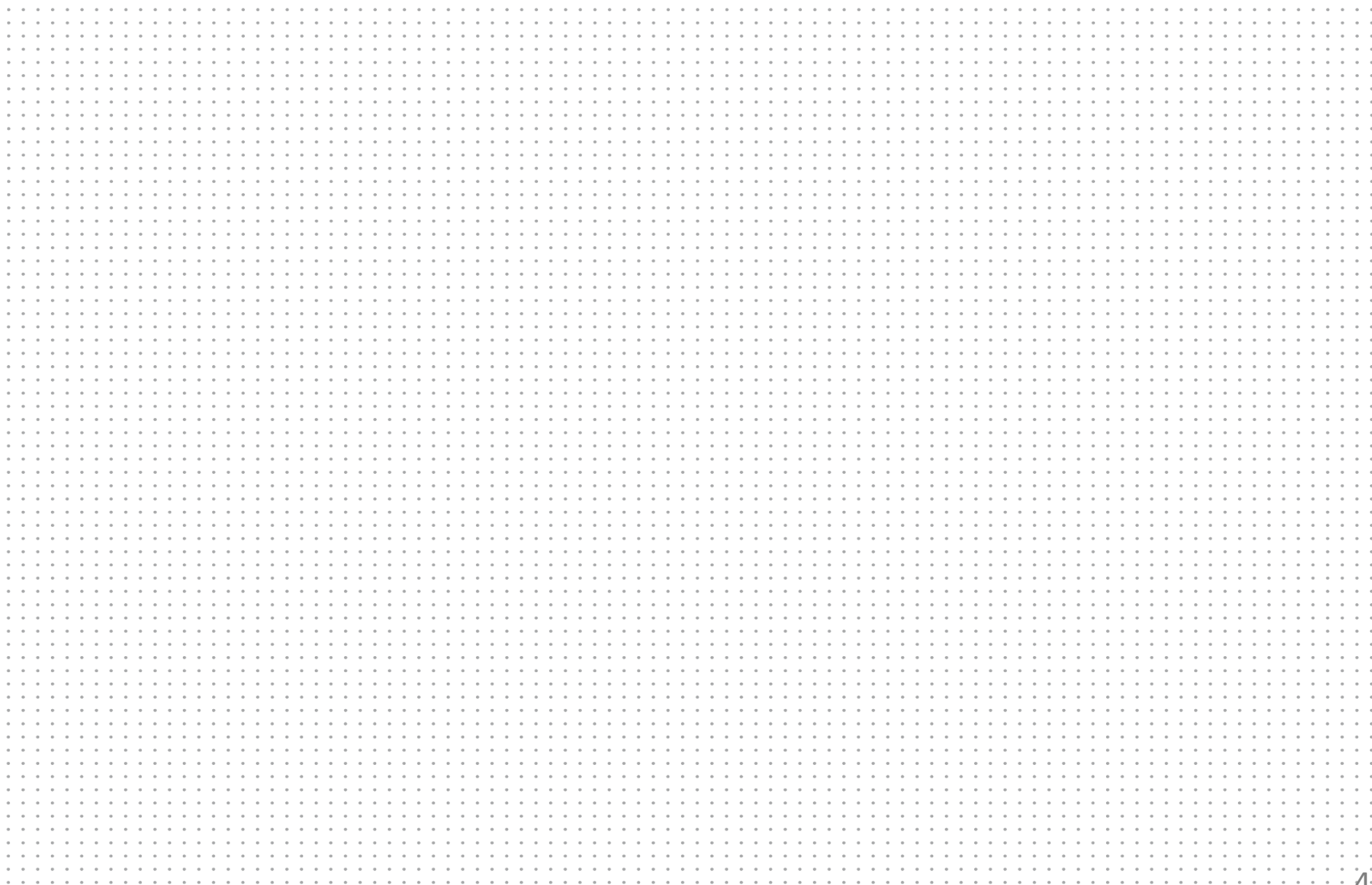
**The 6 Week Planning
Cycle**

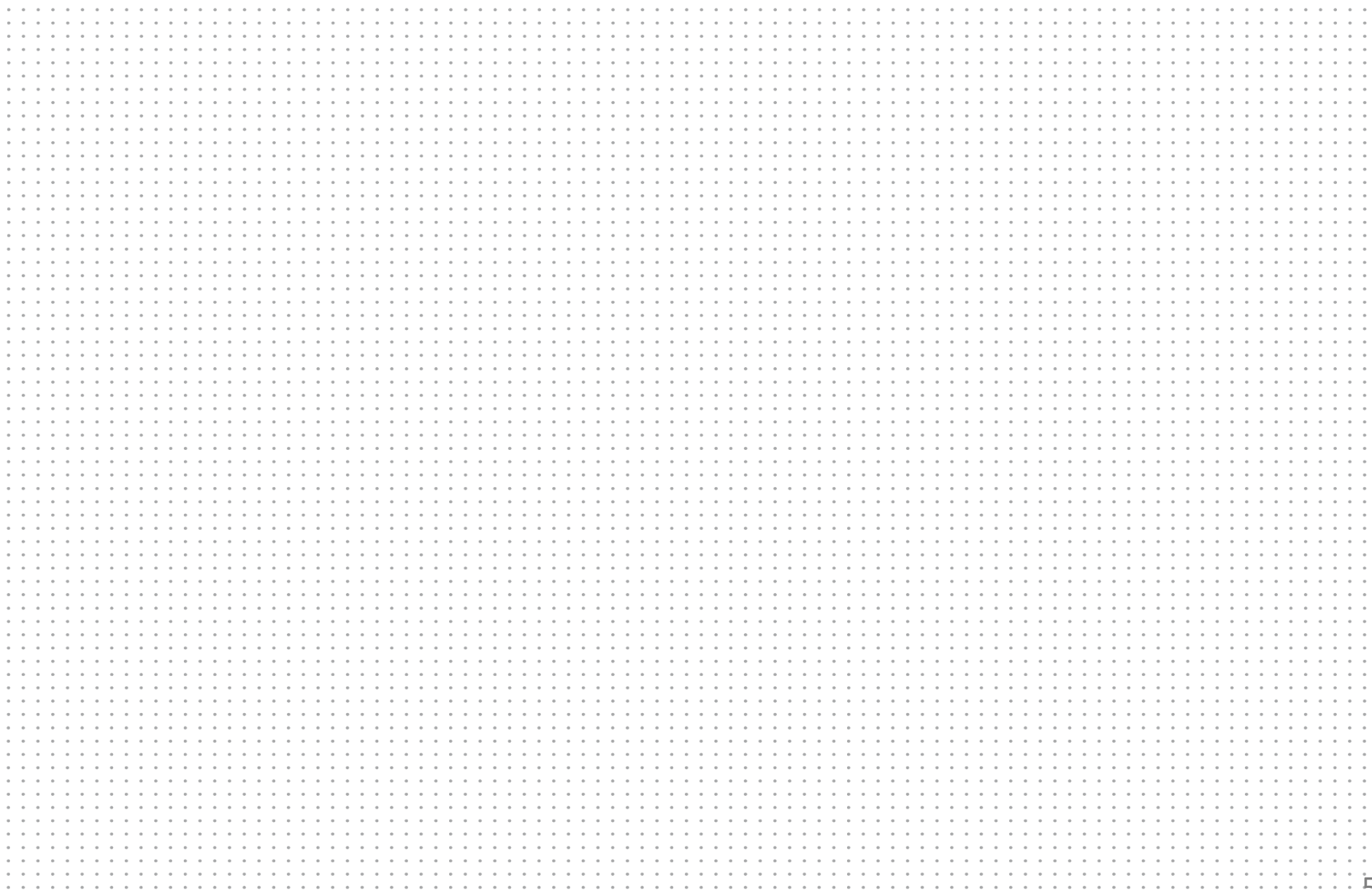
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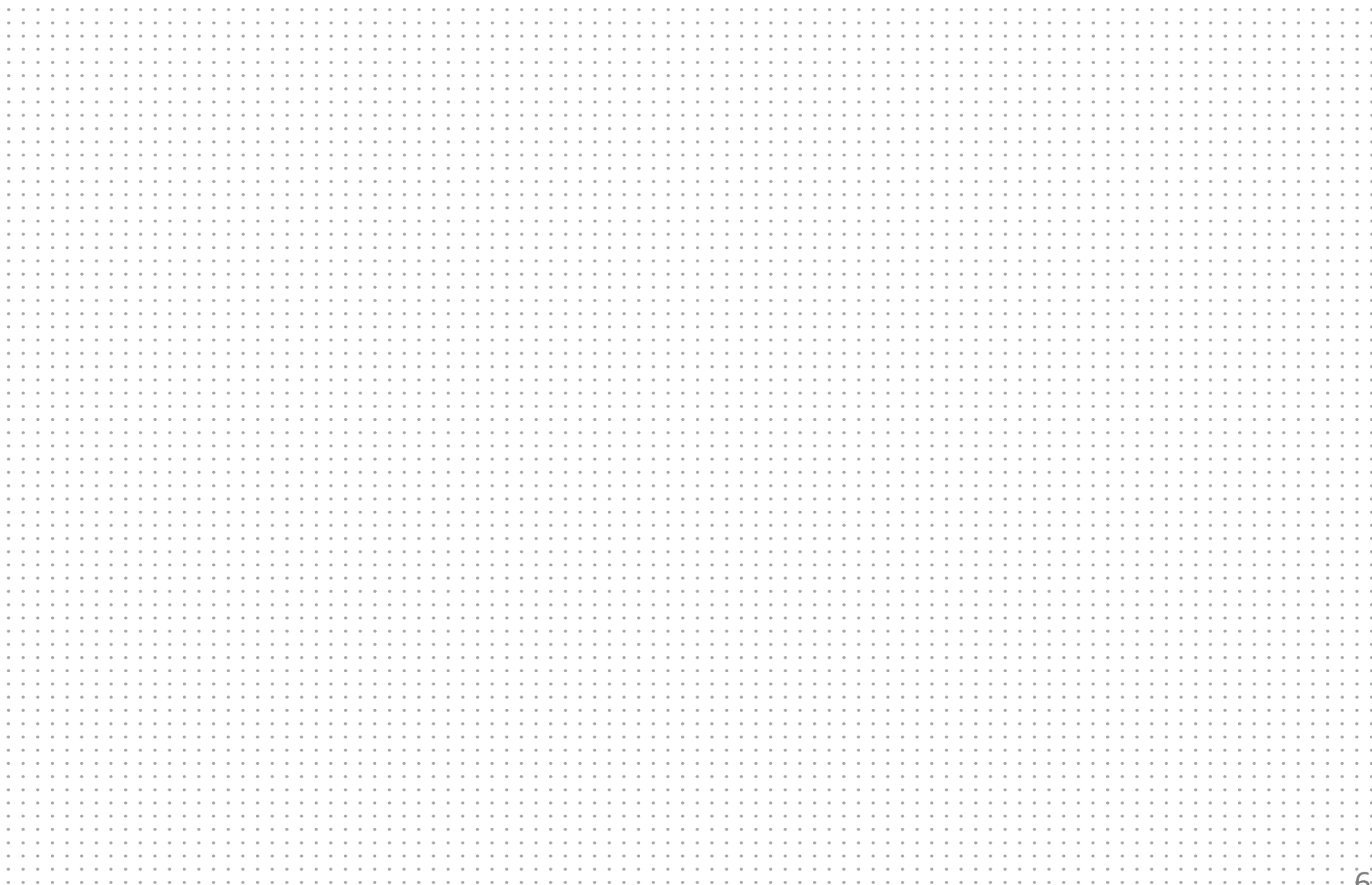
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The Momentum Gameplan™

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

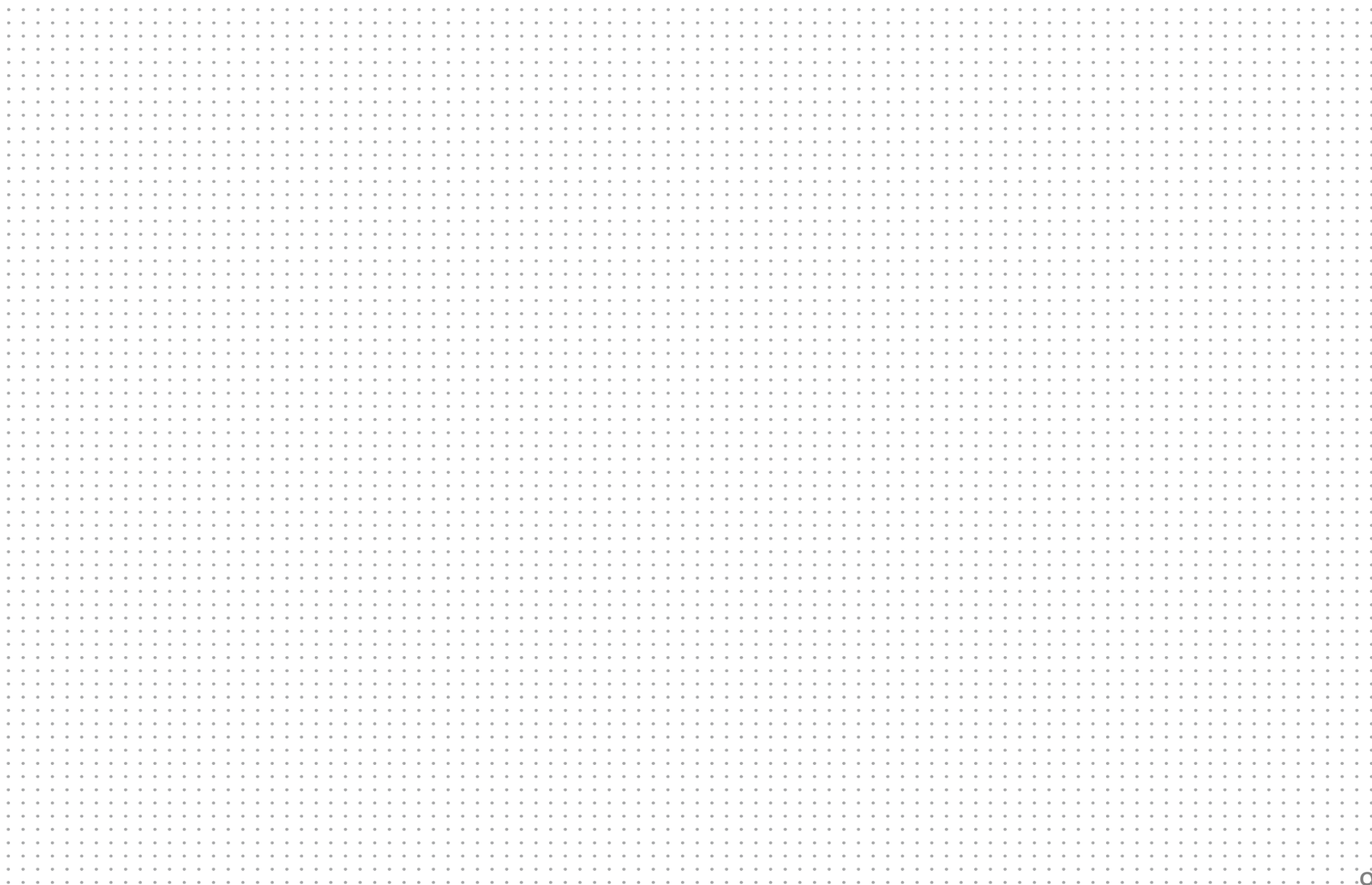
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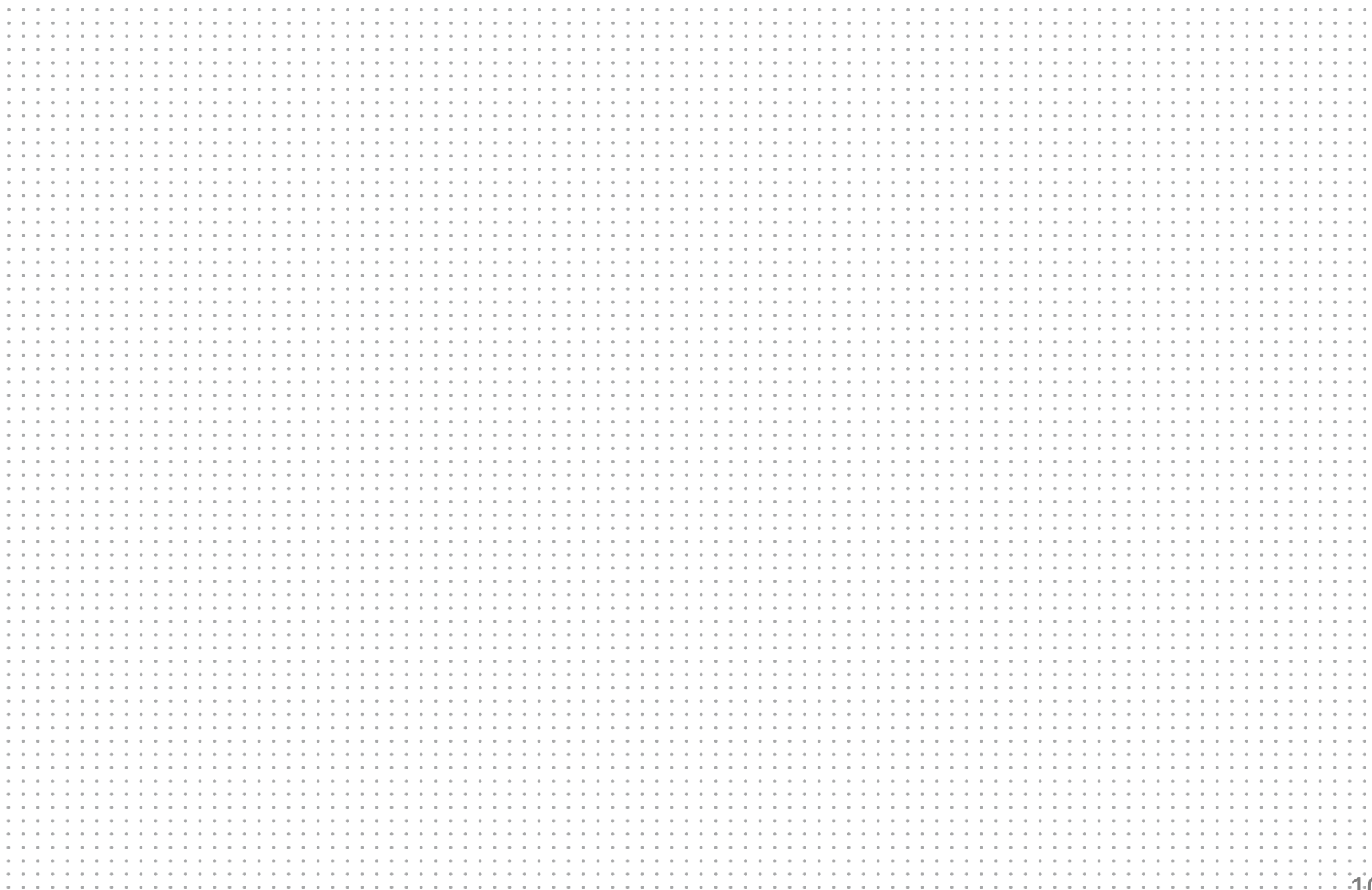
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THE PROFITABLE TRADIE ROADMAP

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







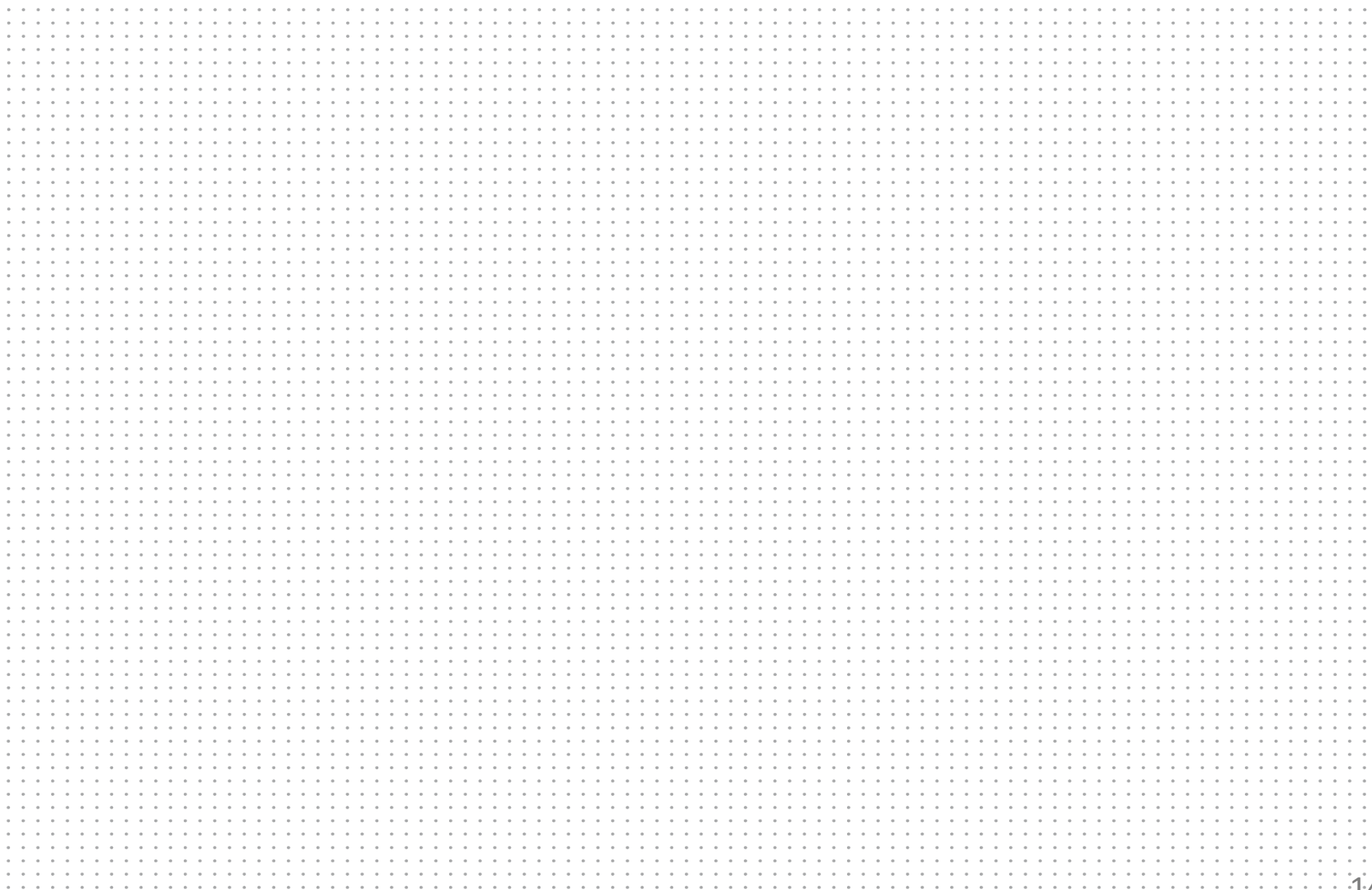
The Belt Levels

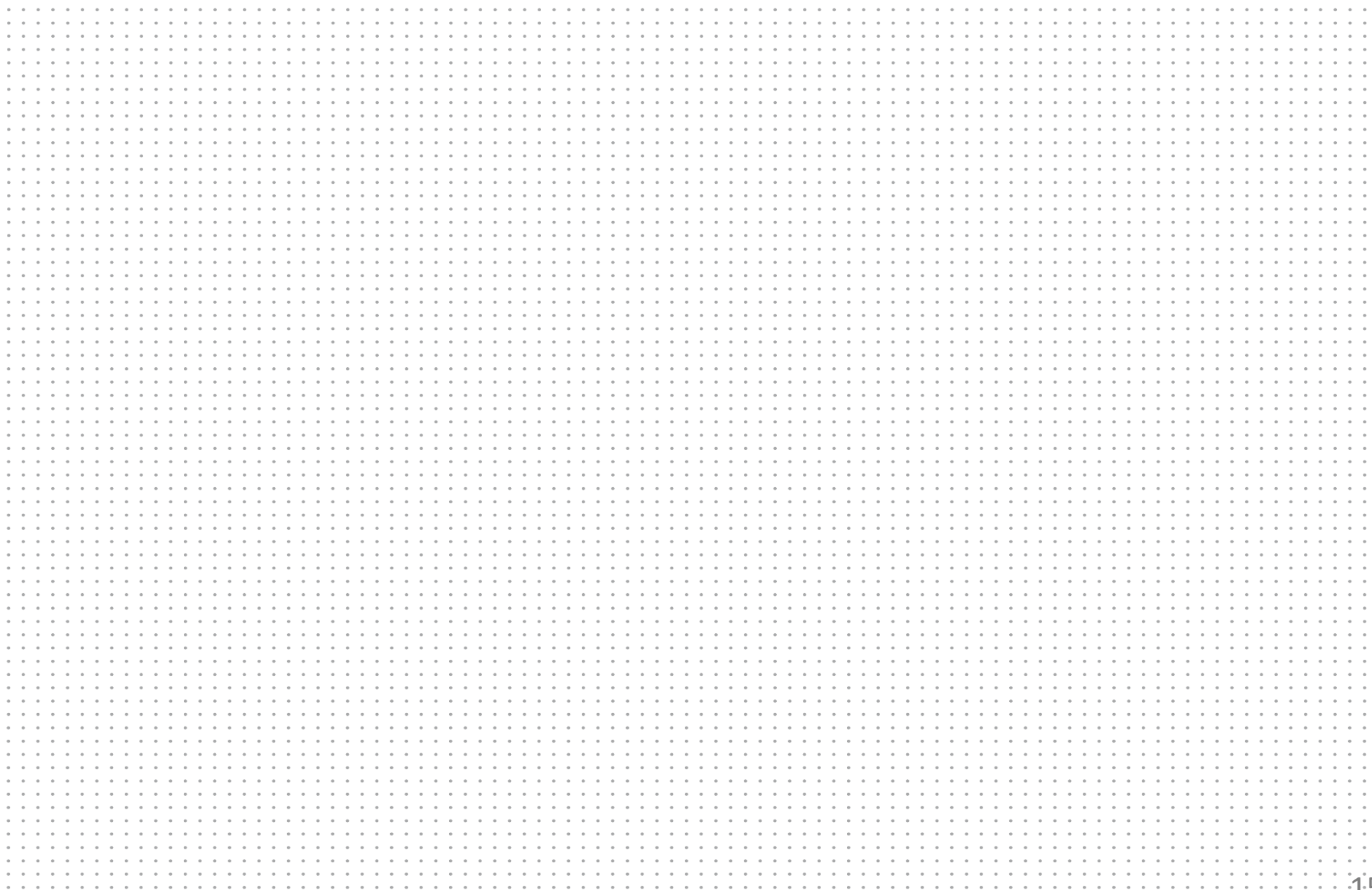


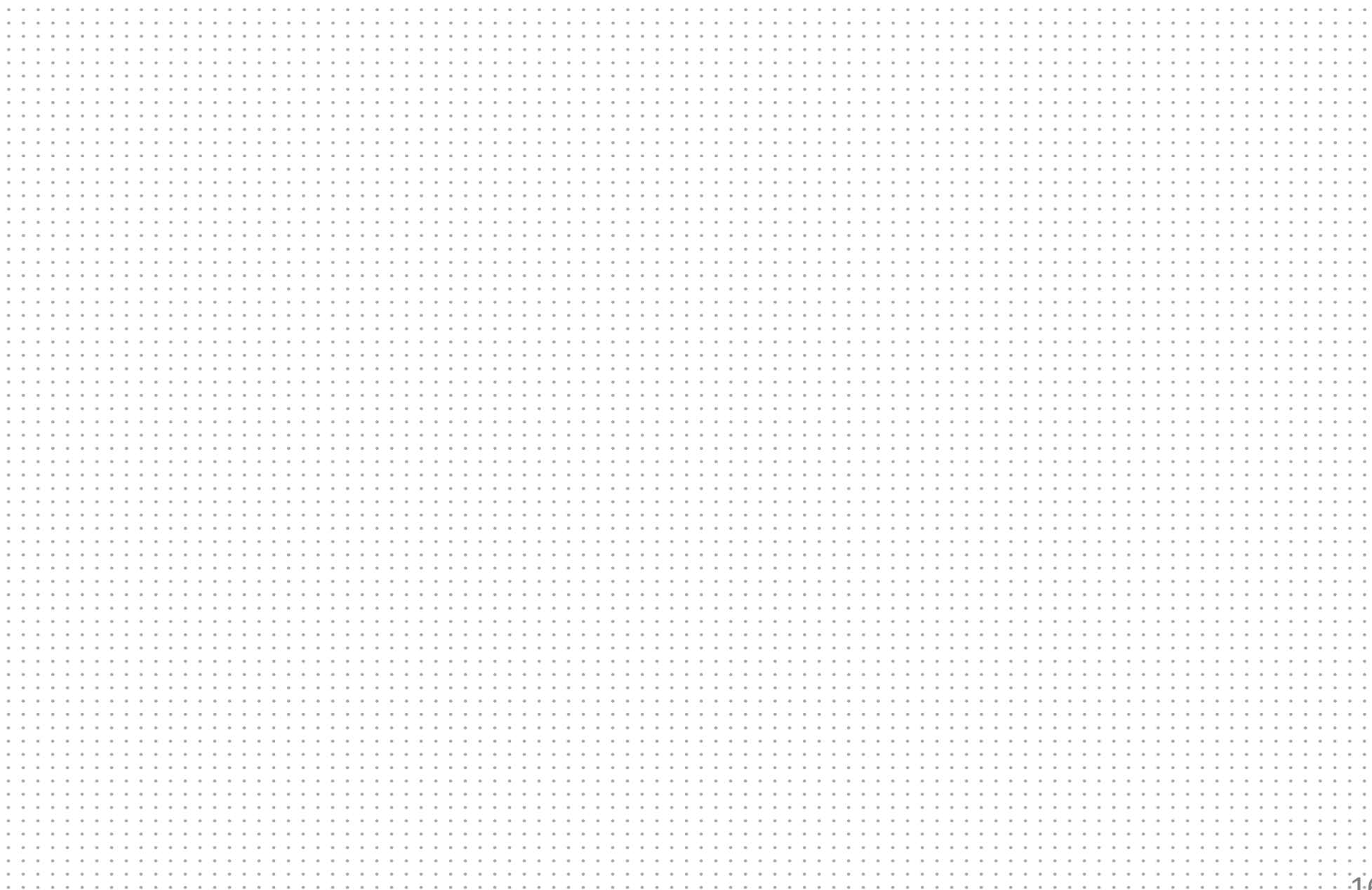
NET PROFIT ACCELERATOR



SCAN ME

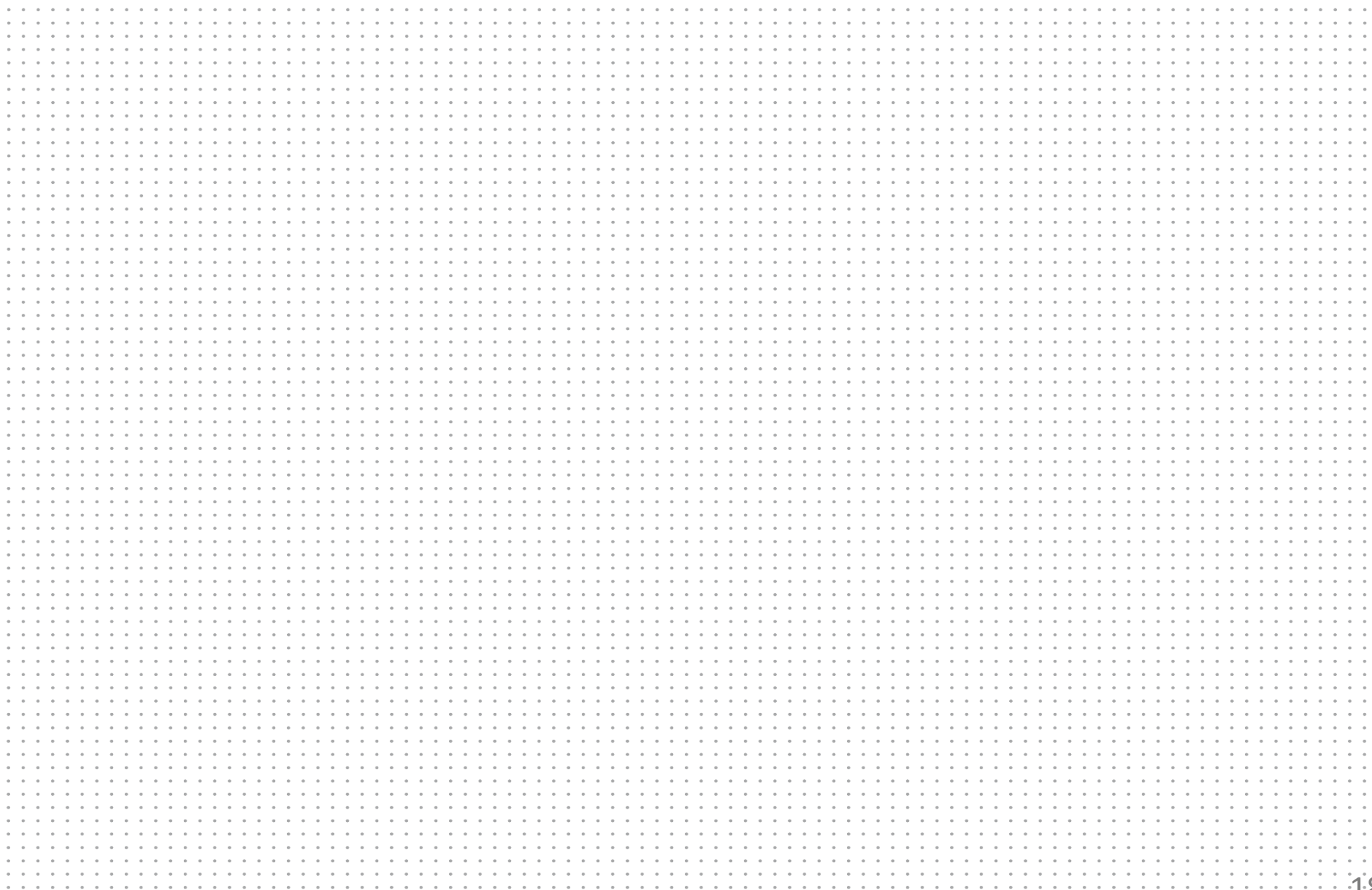






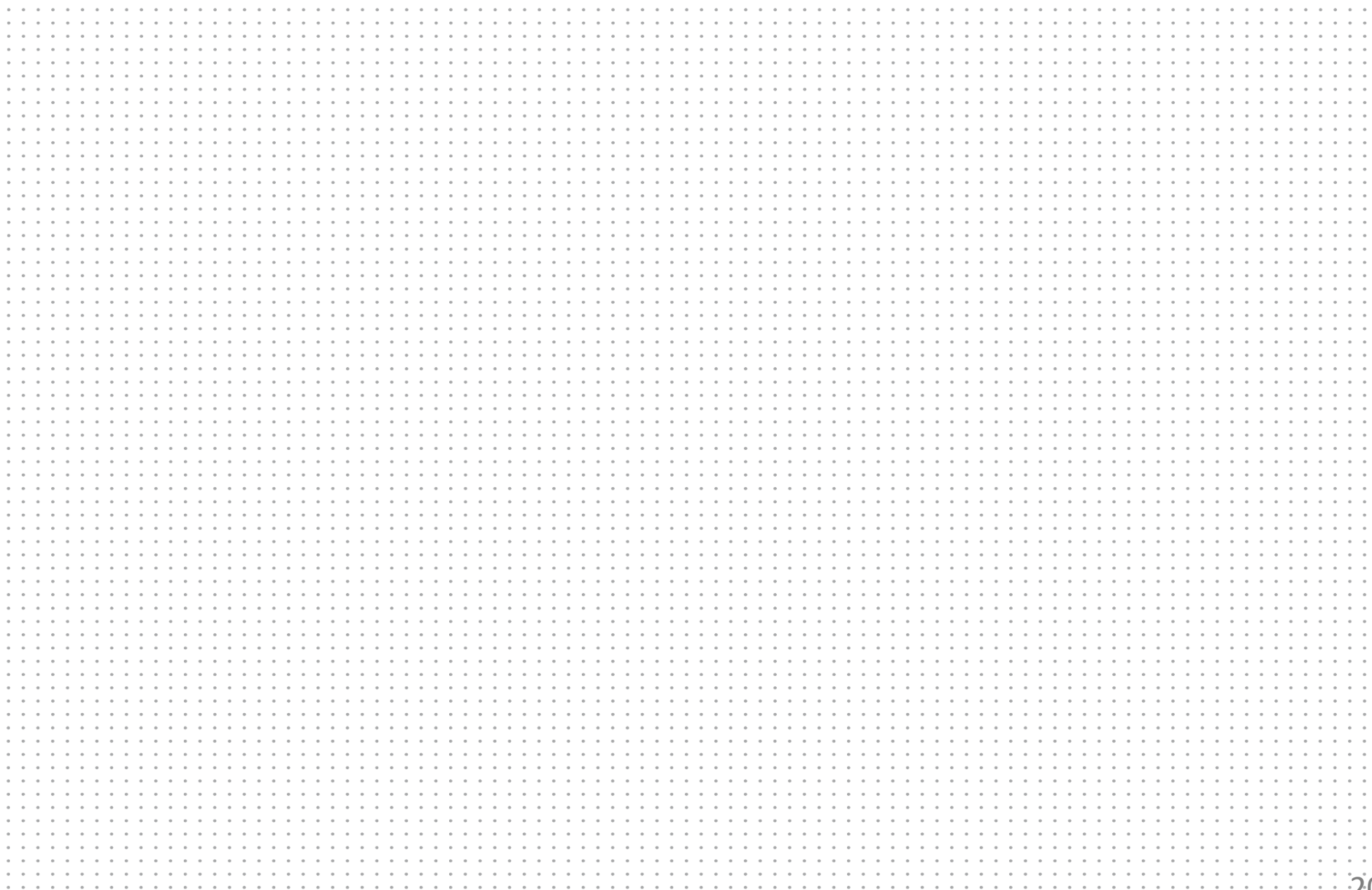
MASTERING THE ART OF SALES

- With Phil Smith



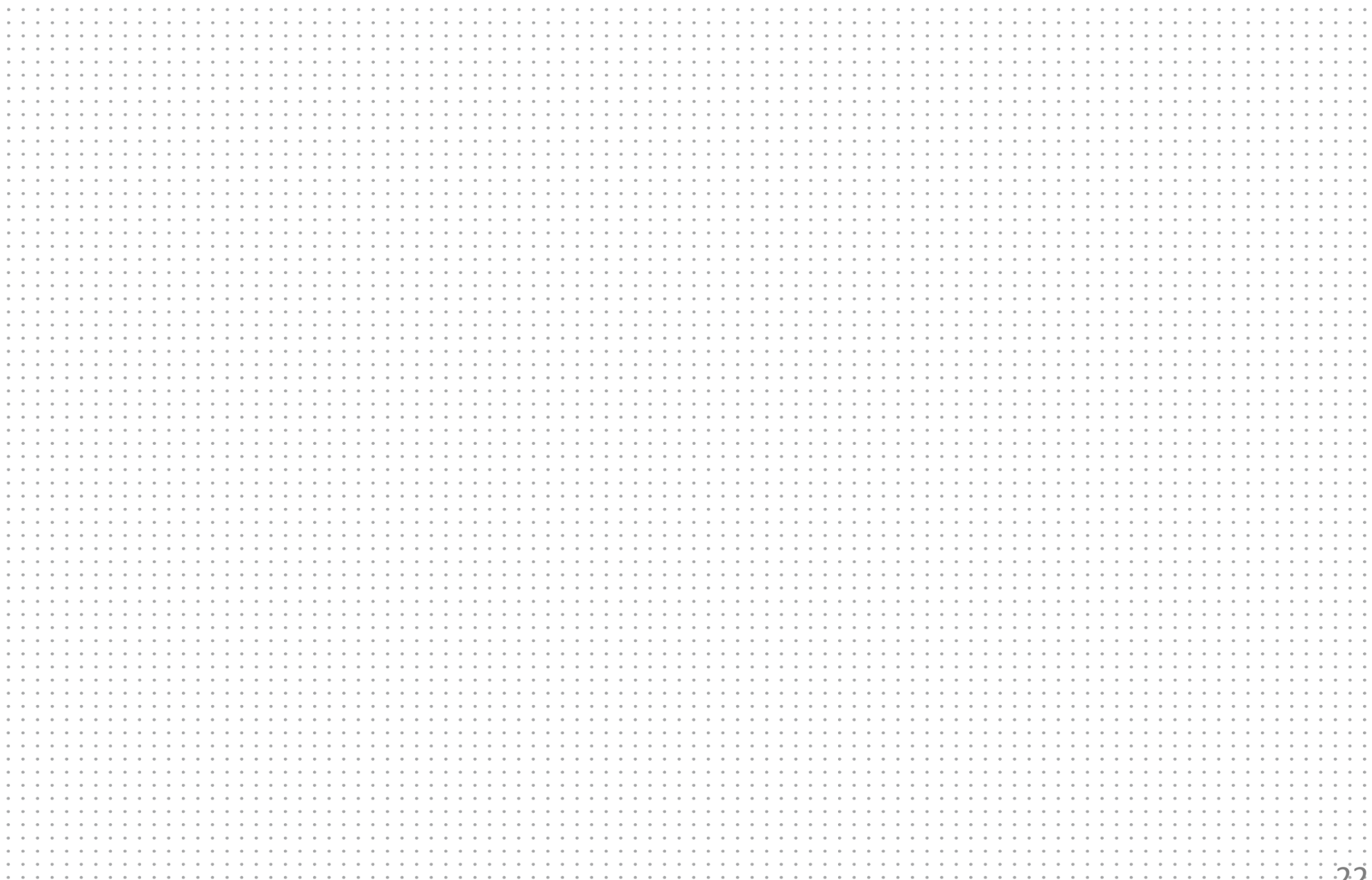
The Bridge





The 3 P's





5 Key Principles

1. Do The Basics...



2. Set The Tone...





A large rectangular area with a light gray background and a grid of small white dots, serving as a space for notes.

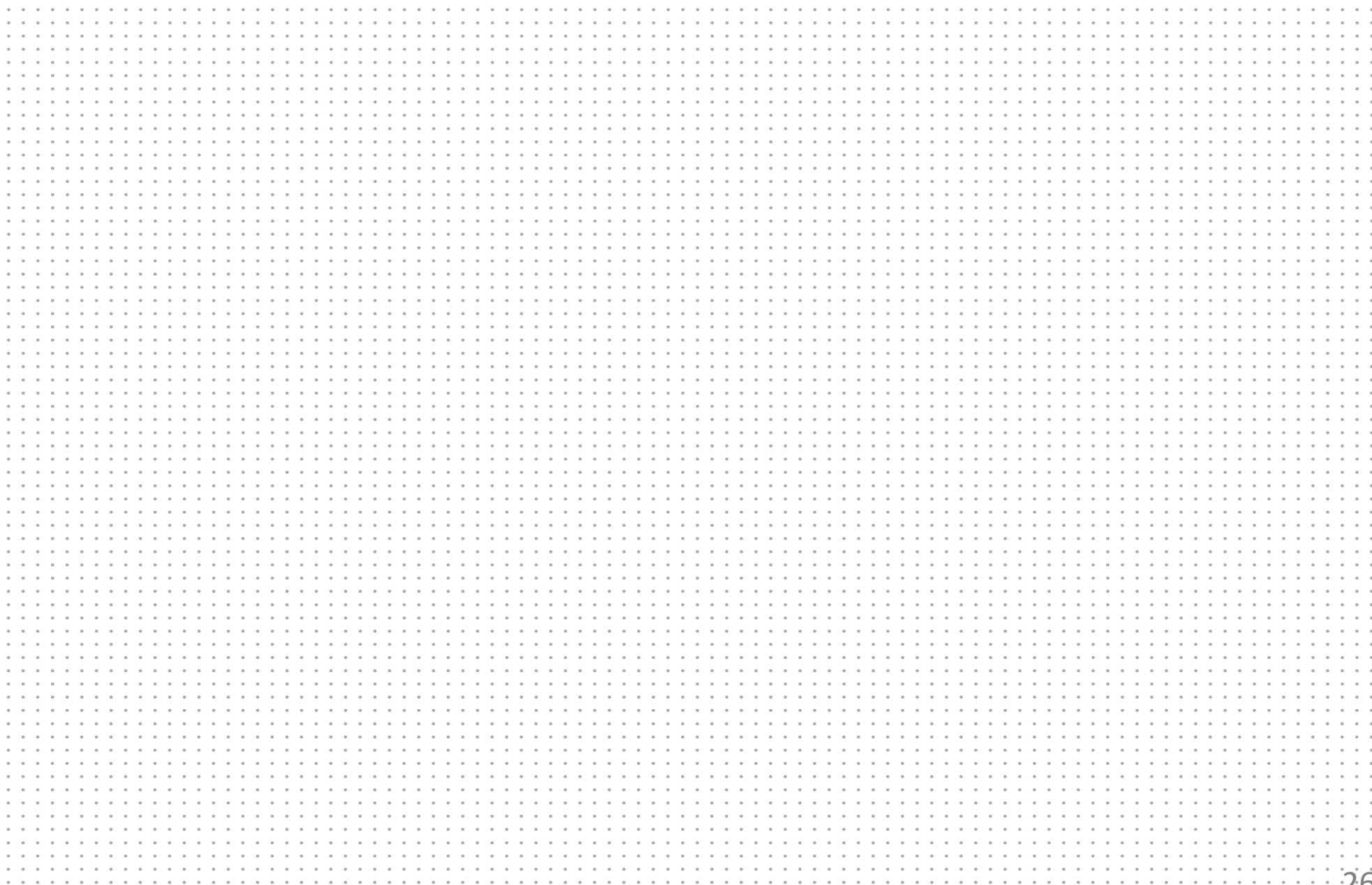
What Are You Selling?

Service / Product

Pain of Customer

Pleasure of Customer

Notes



Minimal Encouragers to Stretch Up

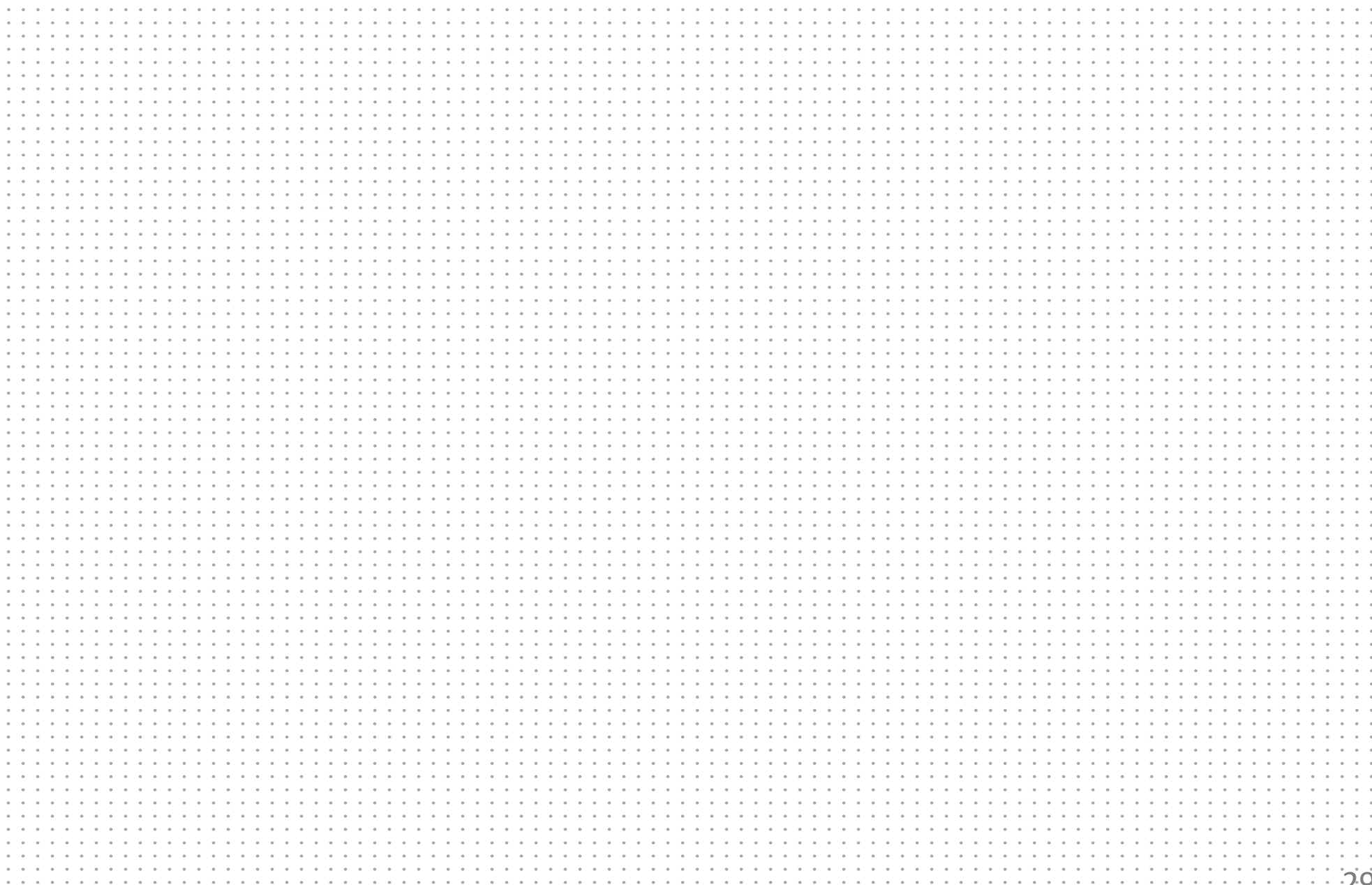
- **What would it mean for you to get this right?**
- **How much could this save you?**
- **What are the immediate benefits you'd see?**
- **What are the long-term benefits you'd see?**
- **How would that change your life?**
- **What would this mean for your family?**
- **What would that do for your mental health?**
- **How would you feel about it?**
- **How will this help you achieve your objectives?**
- **How will this help you better serve your customers?**
- **What else?**
- **Tell me more...**
- **When do you need this by?**
- **How do you measure success in this area?**
- **What are your long-term goals for this project/service?**
- **What are the most important criteria for you in making this decision?**
- **How does this fit into your overall business strategy?**
- **Can you tell me about your current budget for this?**
- **What are the most critical factors for this project?**

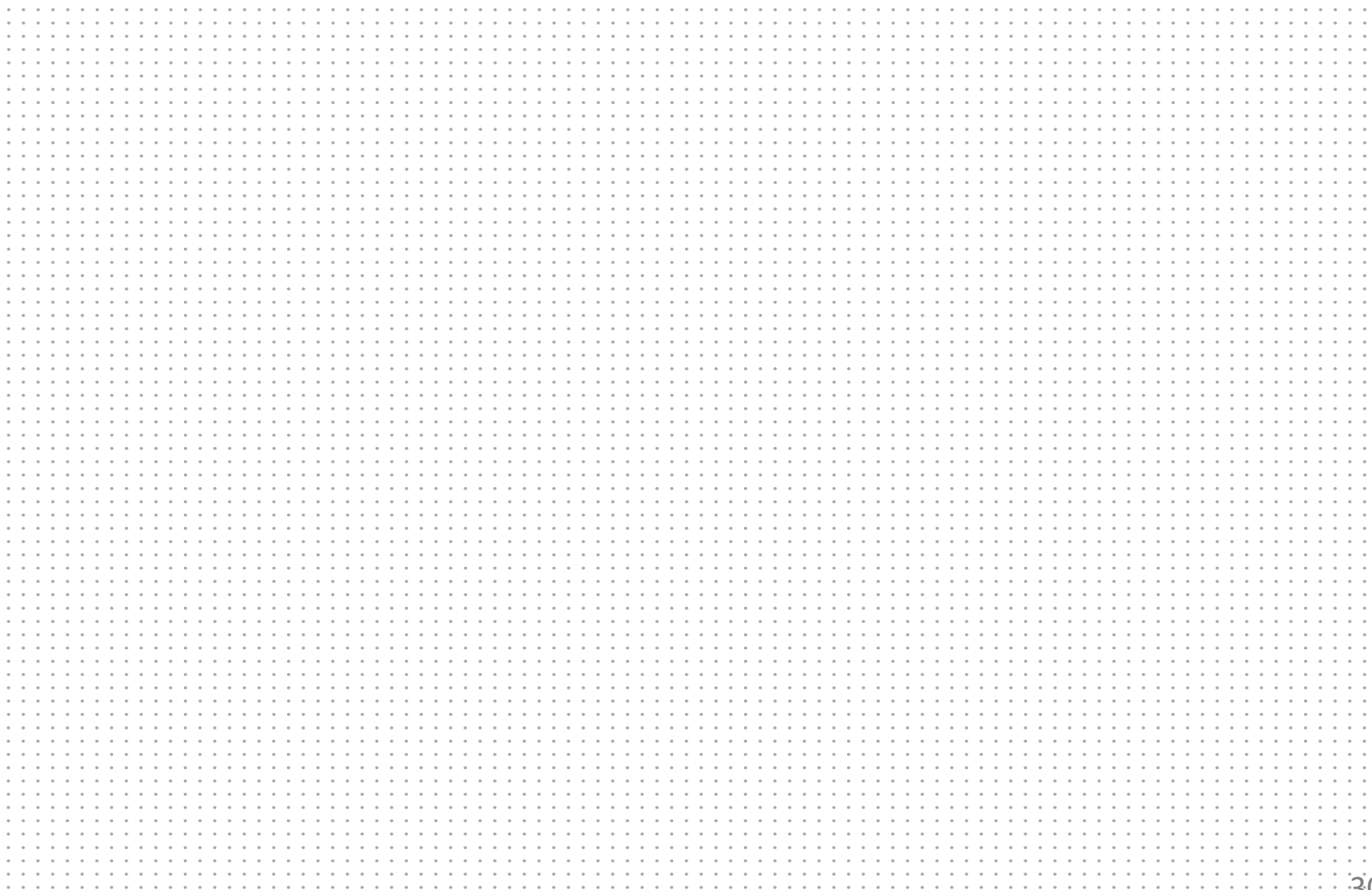
Notes

Minimal Encouragers to Stretch Down

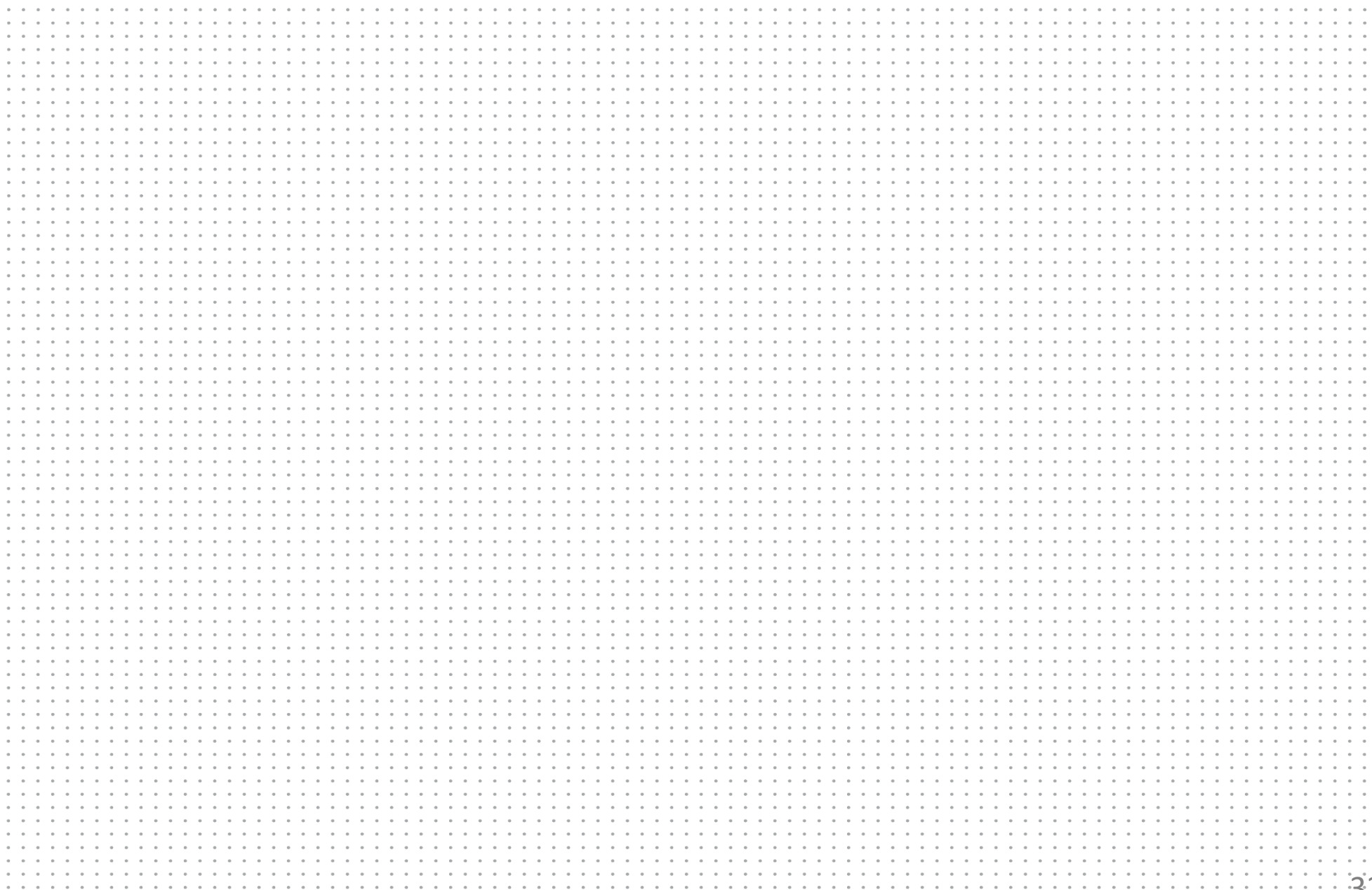
- **How's that affecting your life?**
- **How's that affecting your business?**
- **How much has this cost you so far?**
- **What's it going to cost you to not fix this?**
- **How much money are you missing out on by not fixing it?**
- **What's the impact of that?**
- **What is that doing to your family?**
- **How much stress has that put on you?**
- **What are you missing out on because you haven't done this?**
- **How long has that stalled you for?**
- **How is that impacting your client experience?**
- **How is that impacting your referrals?**
- **If this is the same in 6 months, what would that mean?**
- **Tell me more...**
- **How are you currently handling that issue?**
- **What are your concerns or reservations about this product/service?**
- **Can you tell me about your experience with similar solutions in the past?**

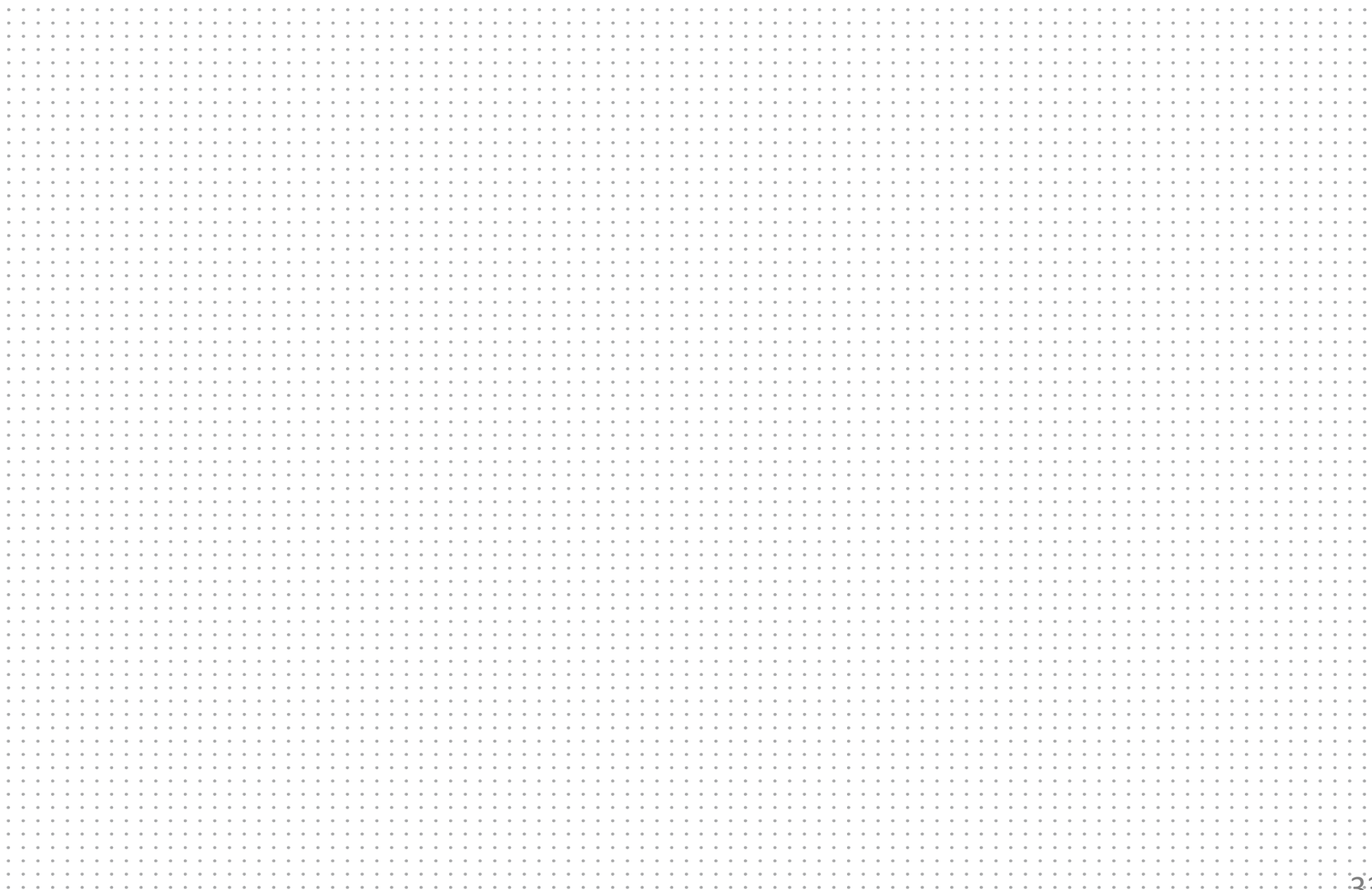
Notes

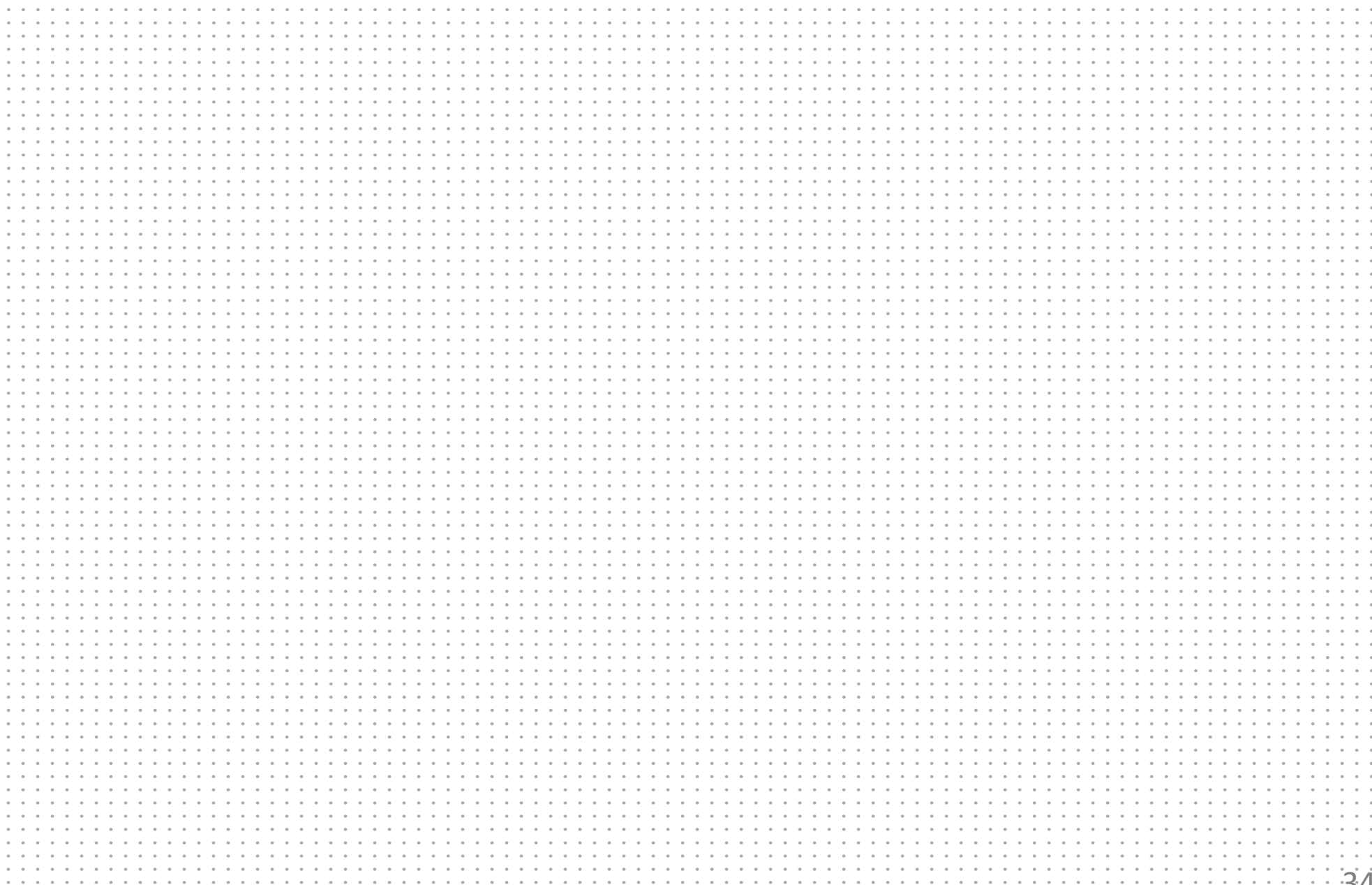


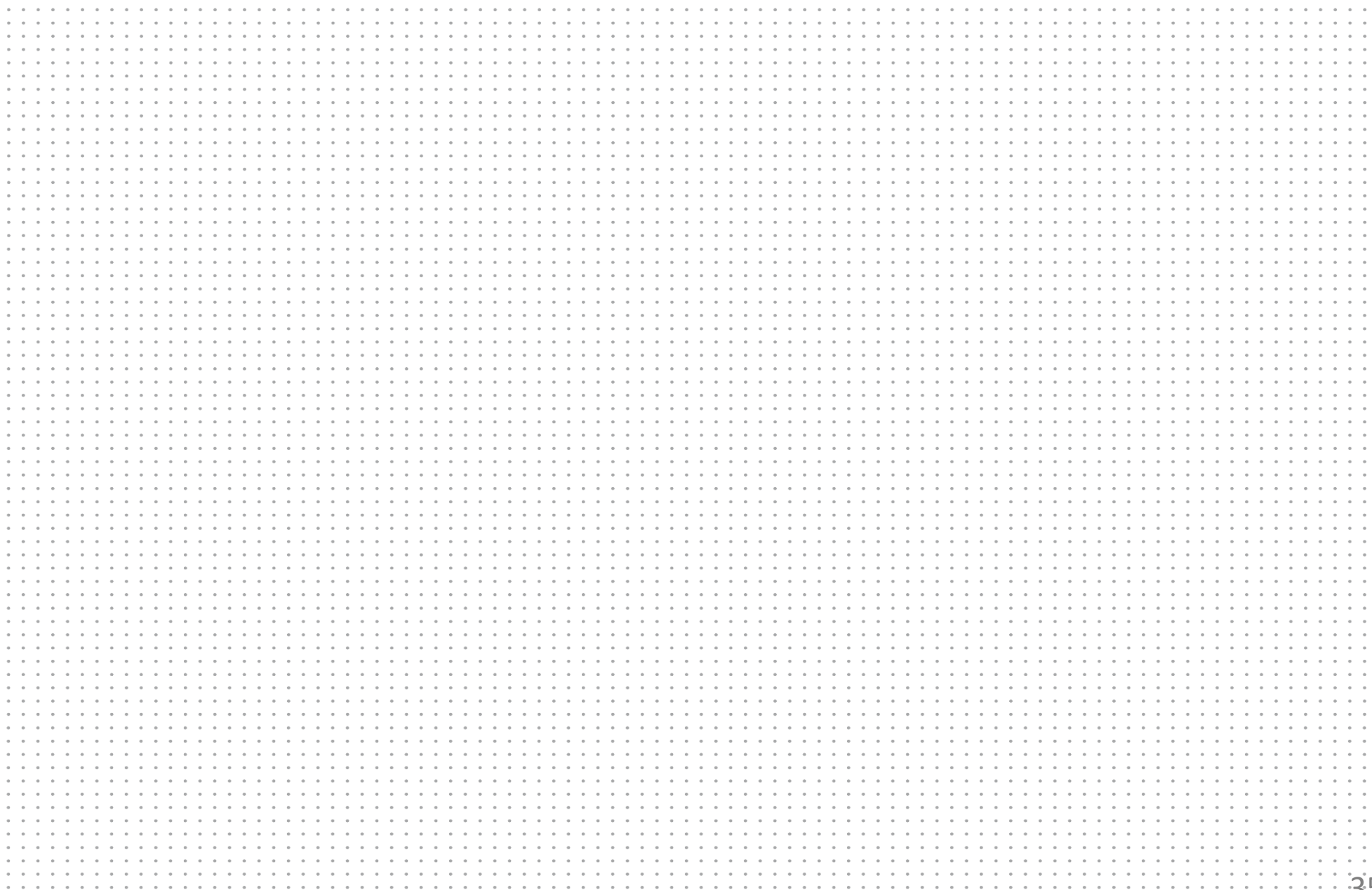


CLIENT OF THE QUARTER









VOTE FOR CLIENT OF THE QUARTER



SCAN ME

MASTERMIND



The Mastermind

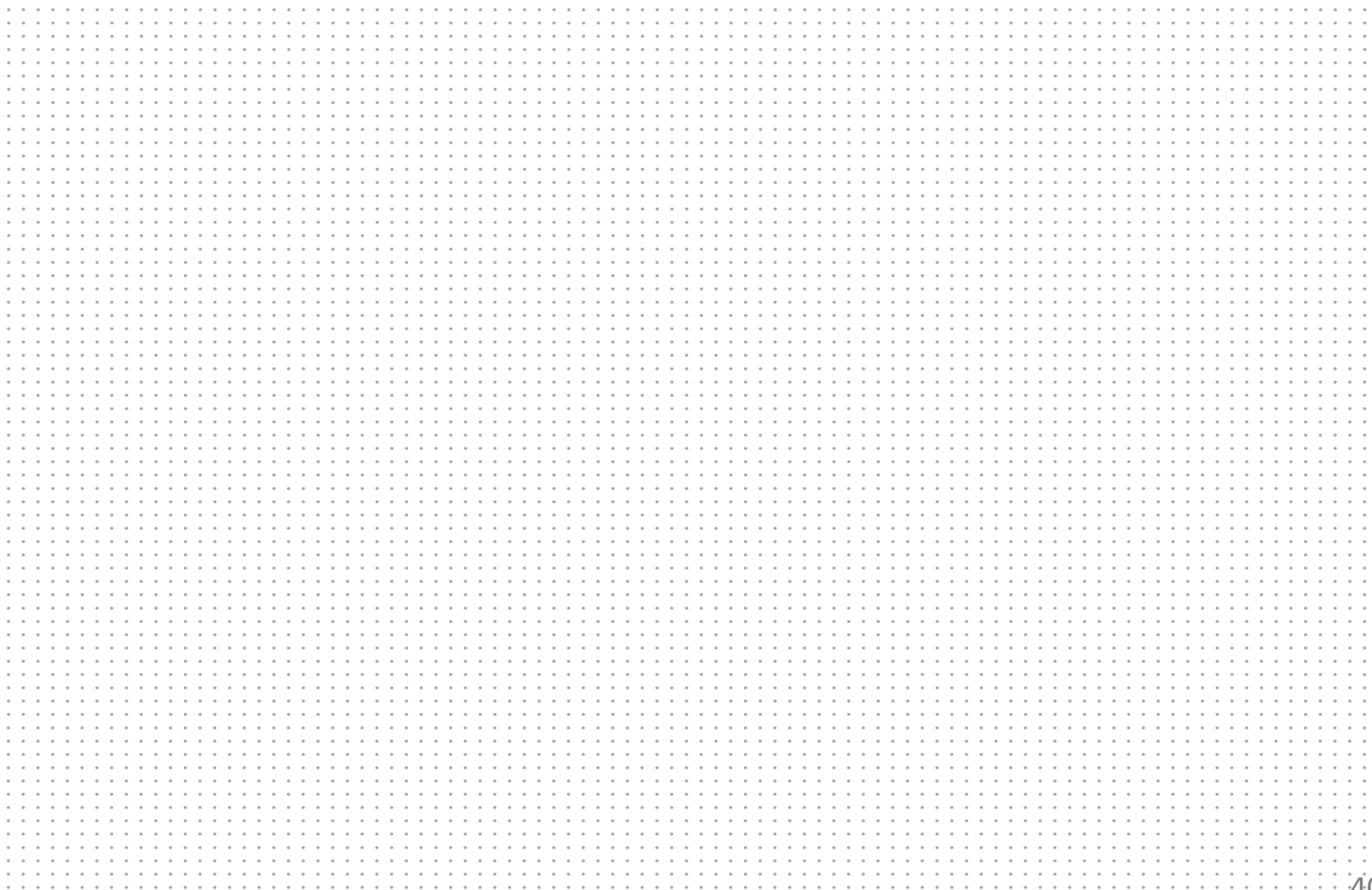
Challenge | My specific challenge is...

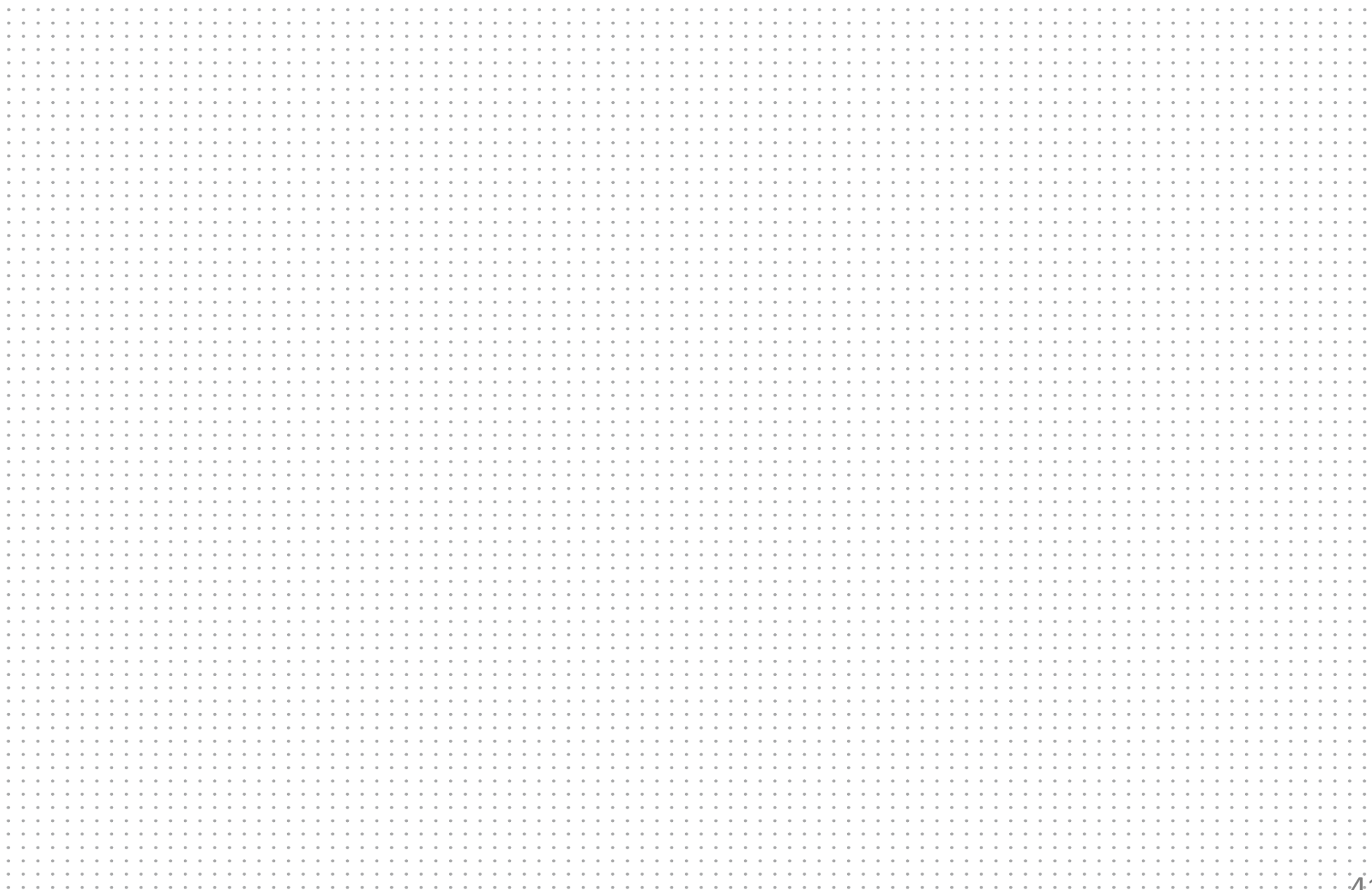
Question | My specific question is...

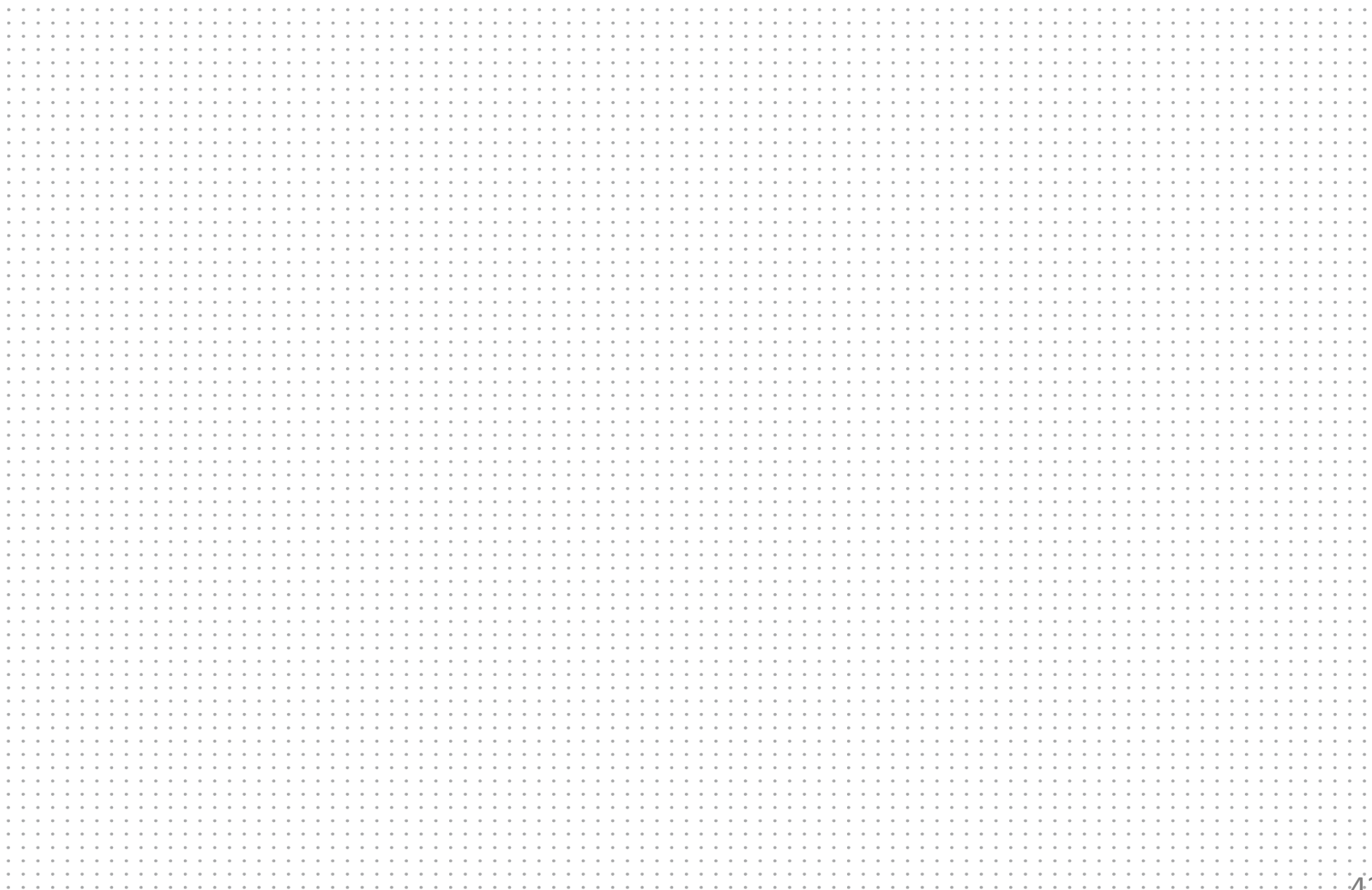
Insights & Actions

Insights & Actions

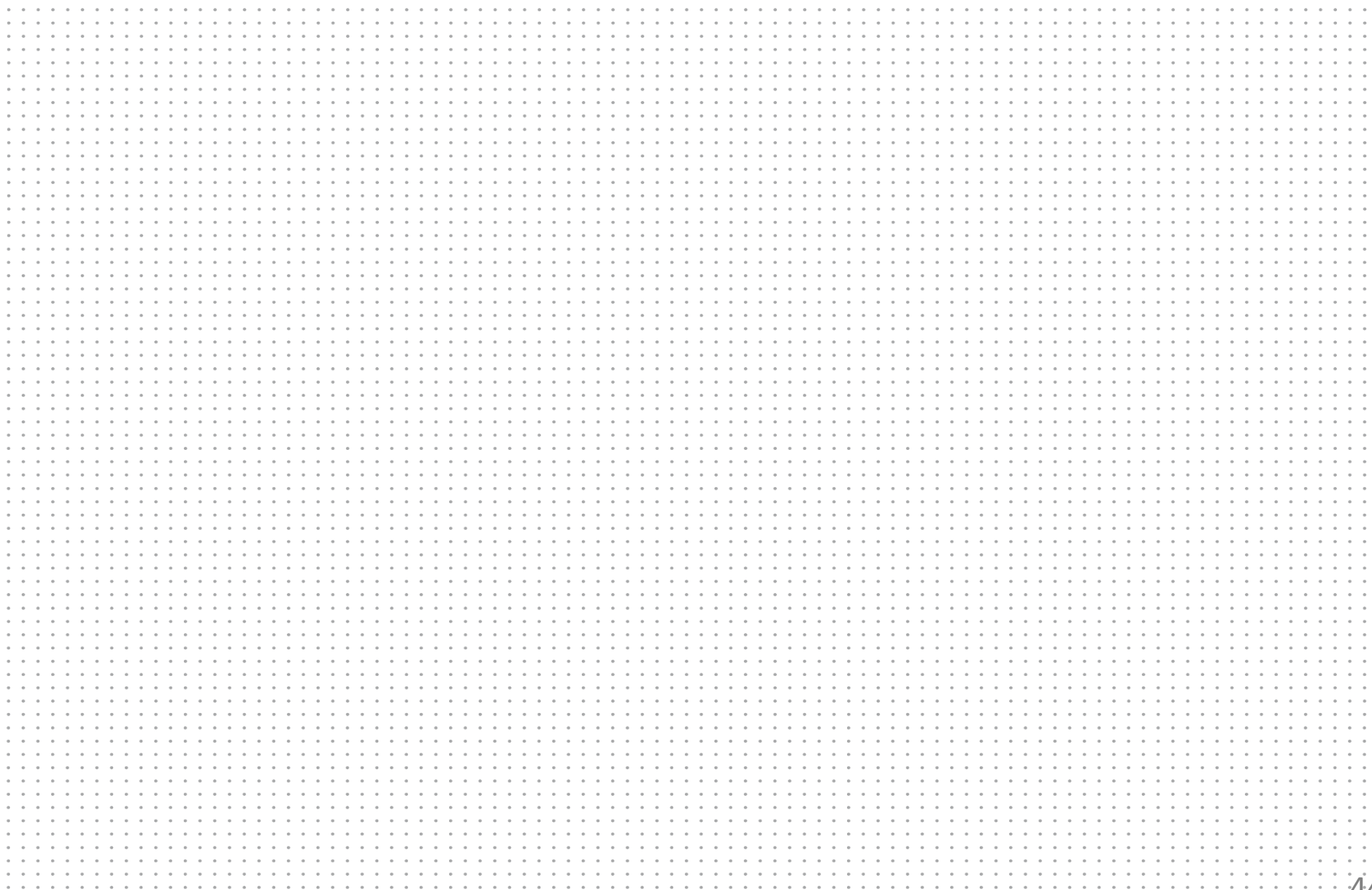
Insights & Actions

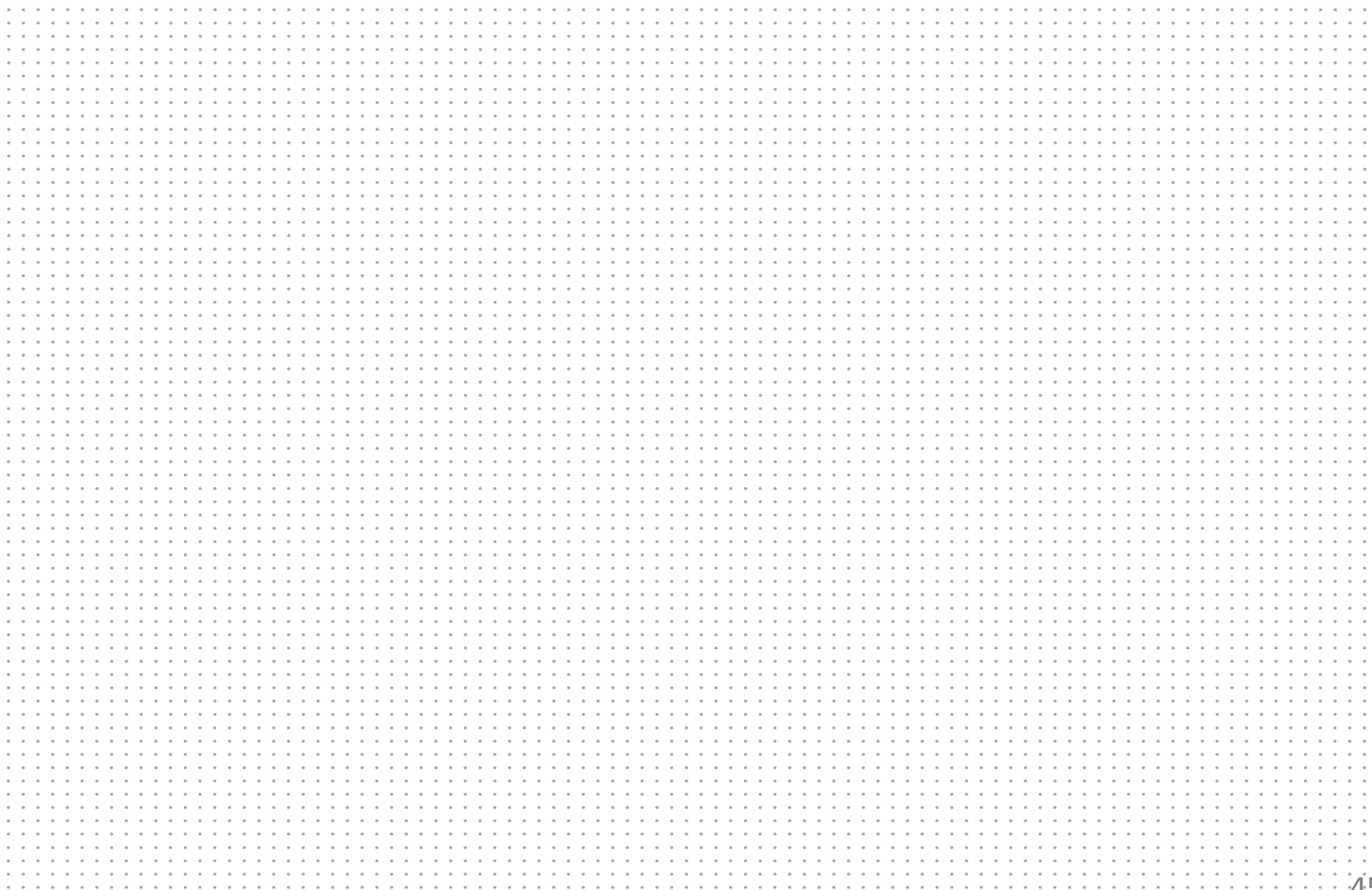


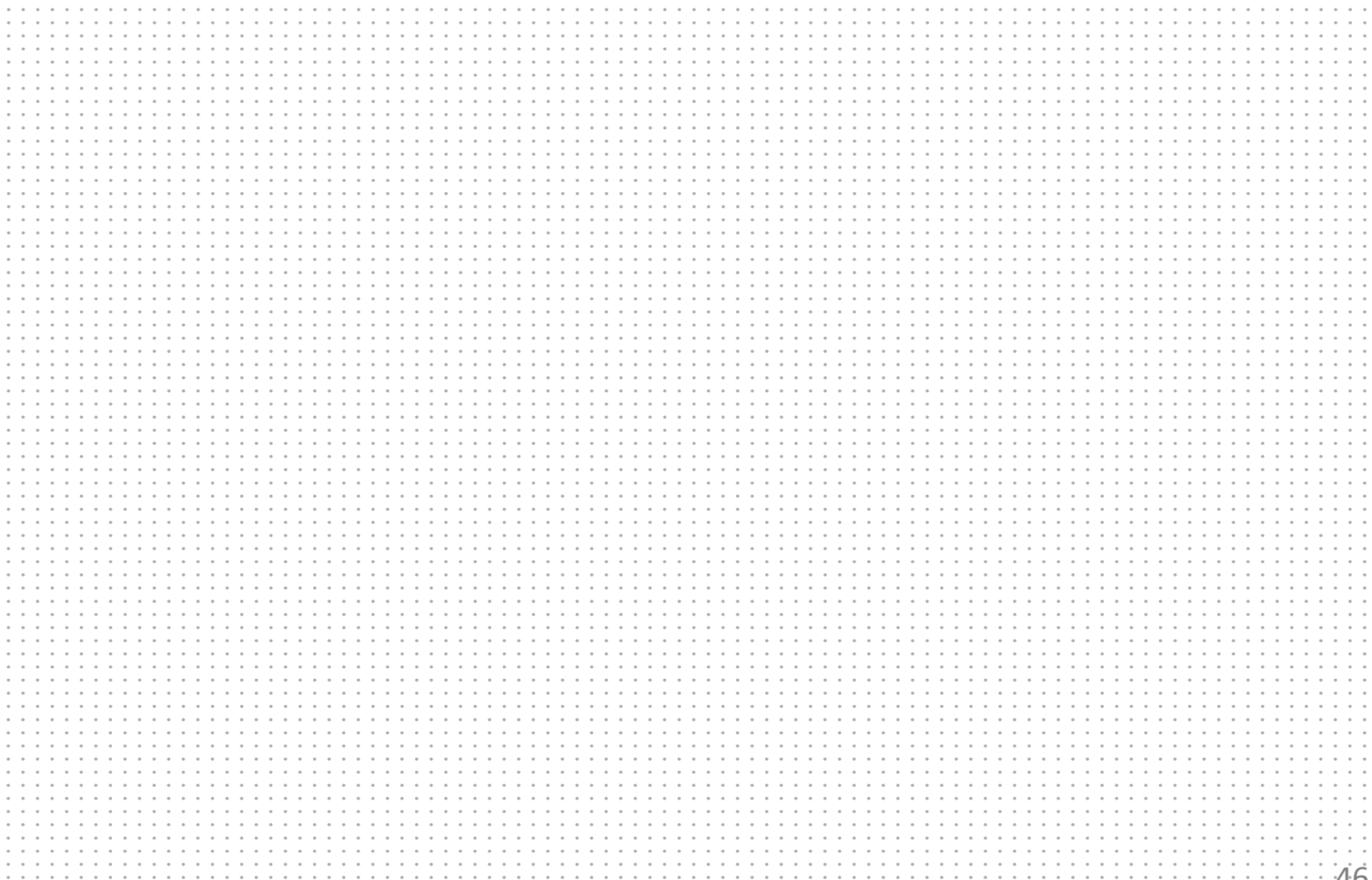


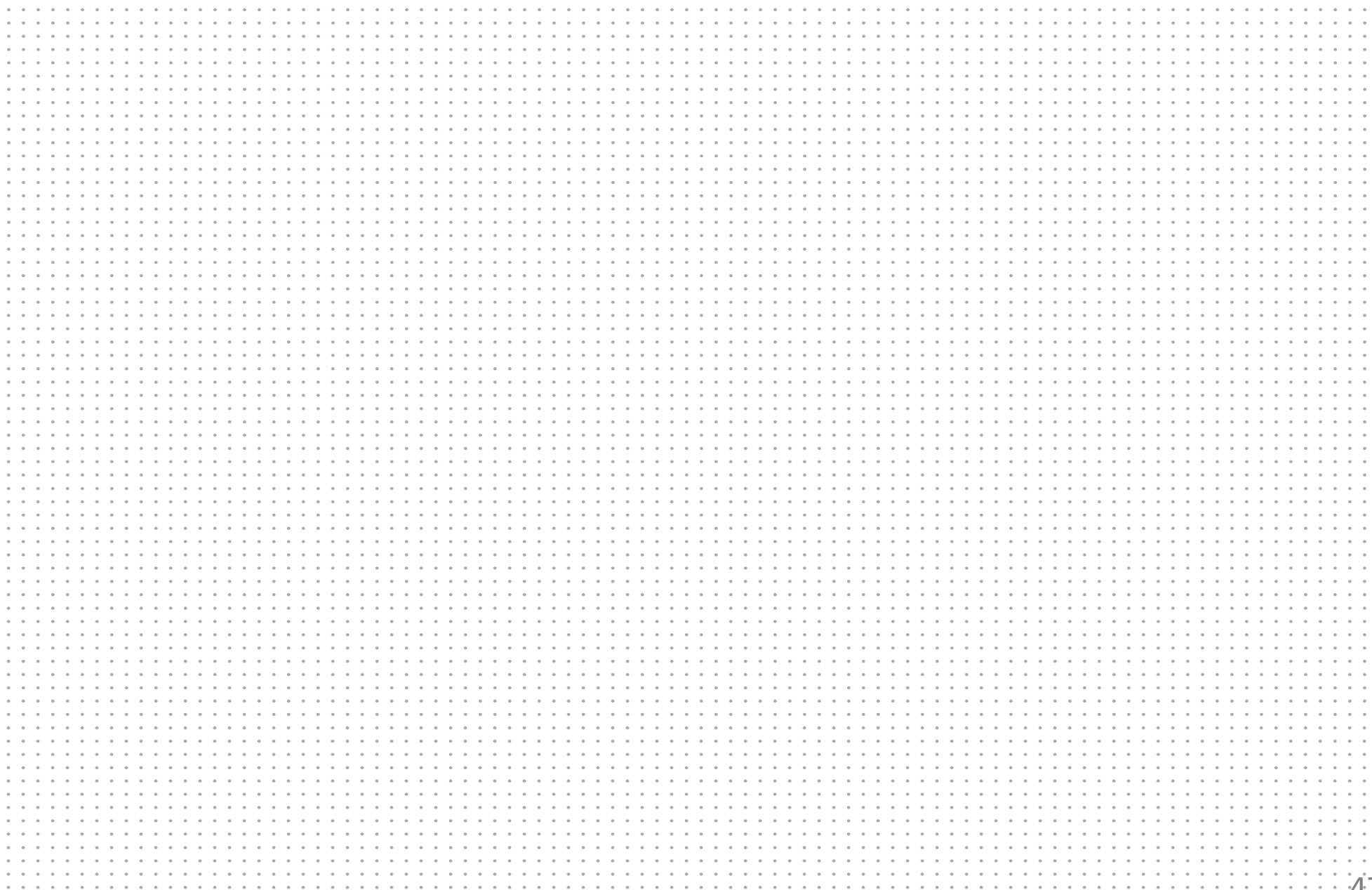


CAM CALKOEN



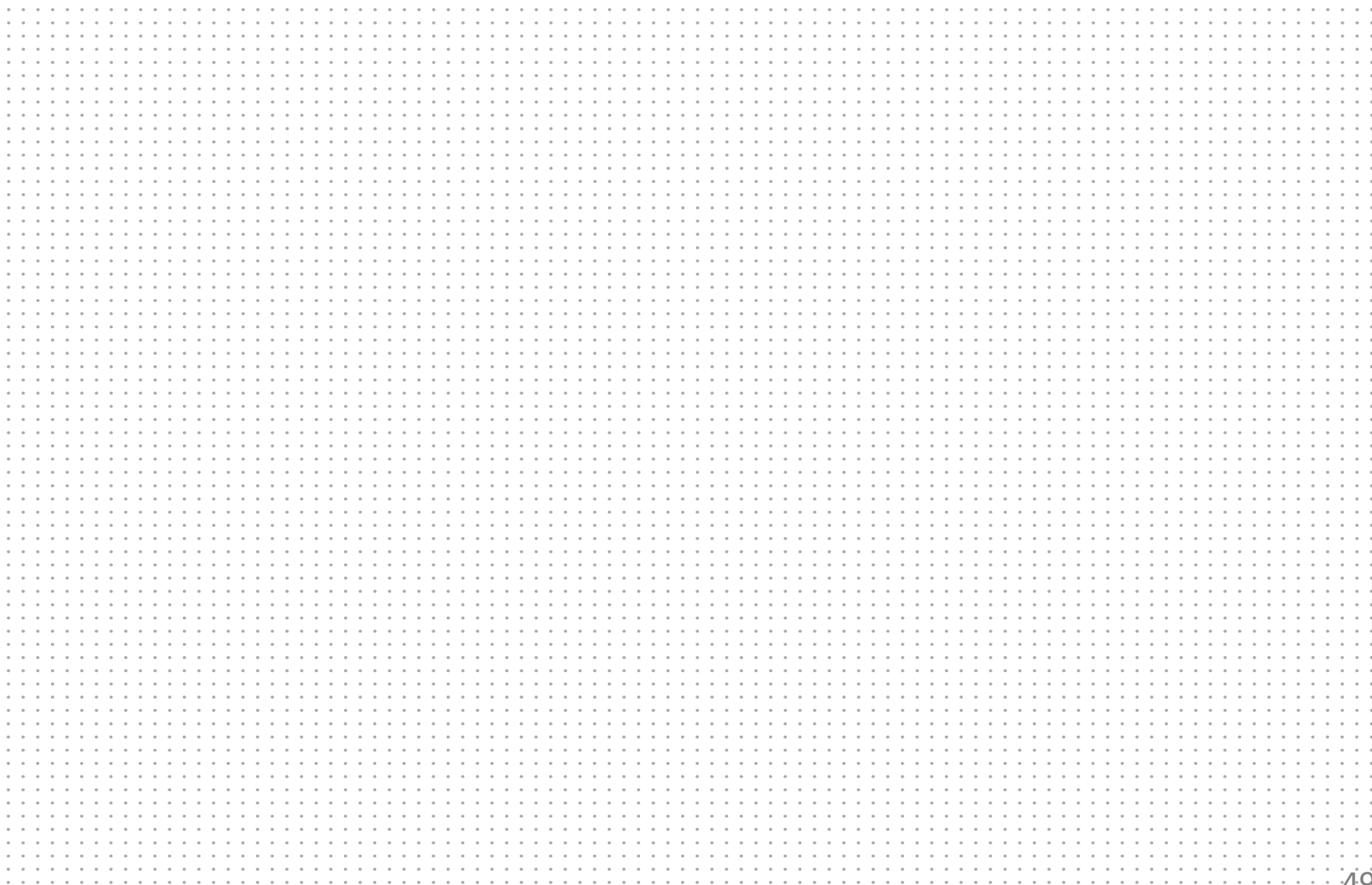




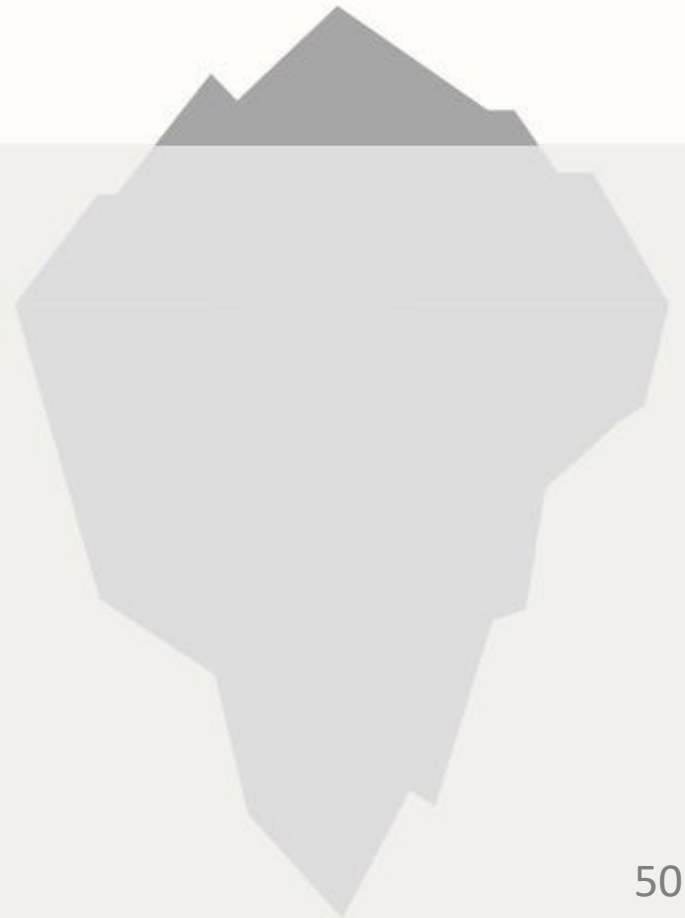


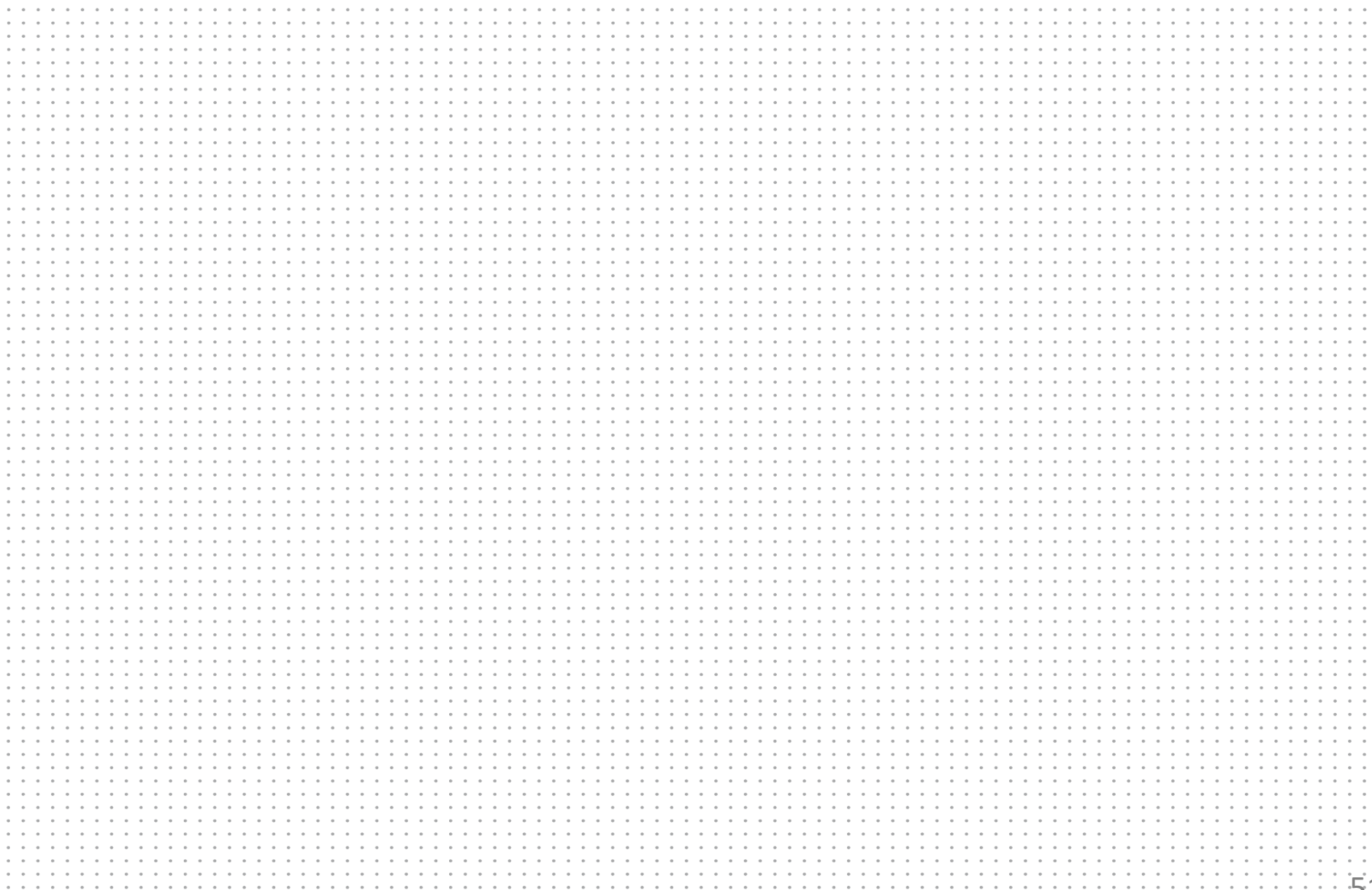
CRUSHING DIFFICULT CONVERSATIONS

- With Cam Hill



The Iceberg





5 Key Principles...



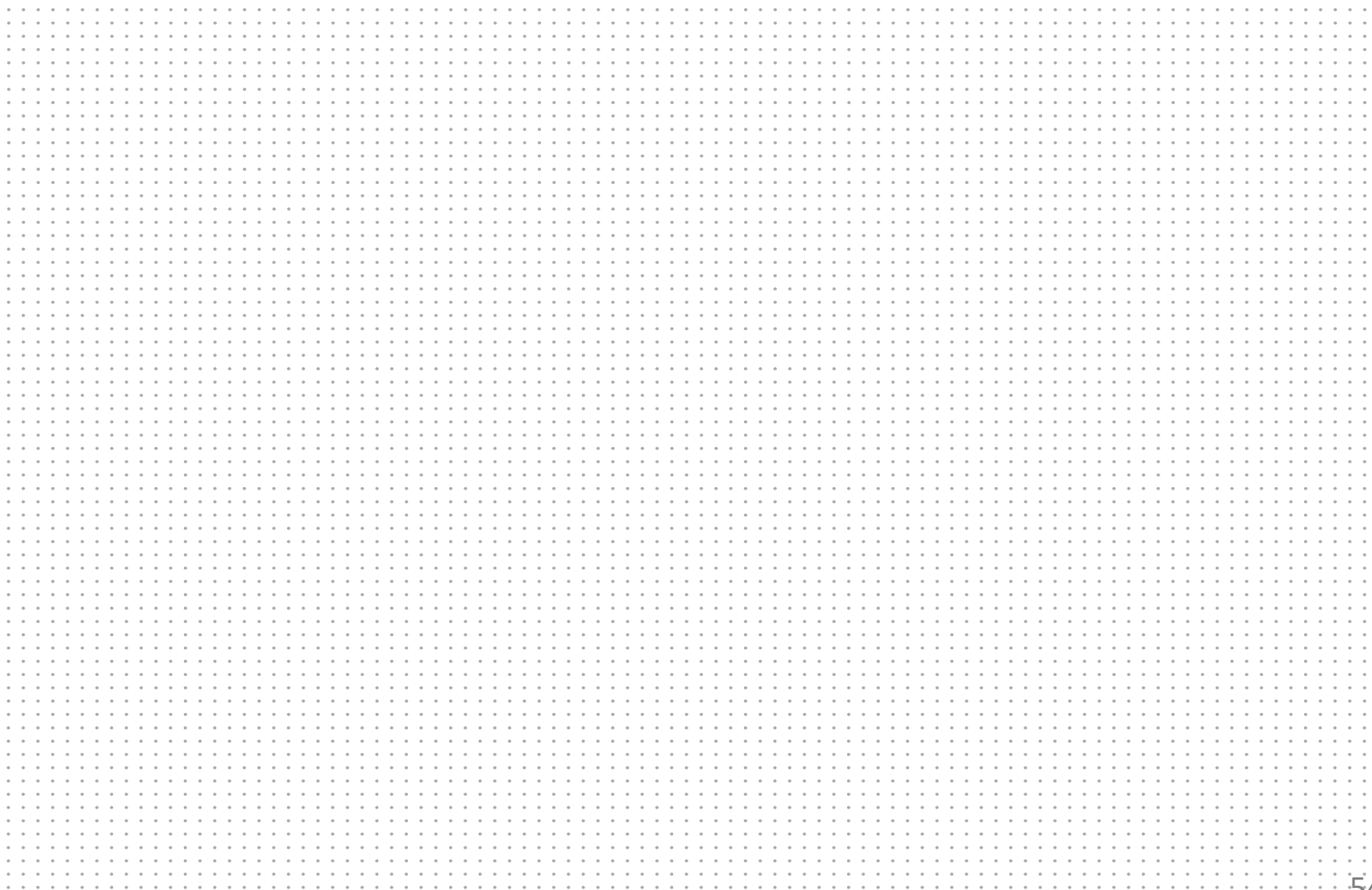
1. Culture First...



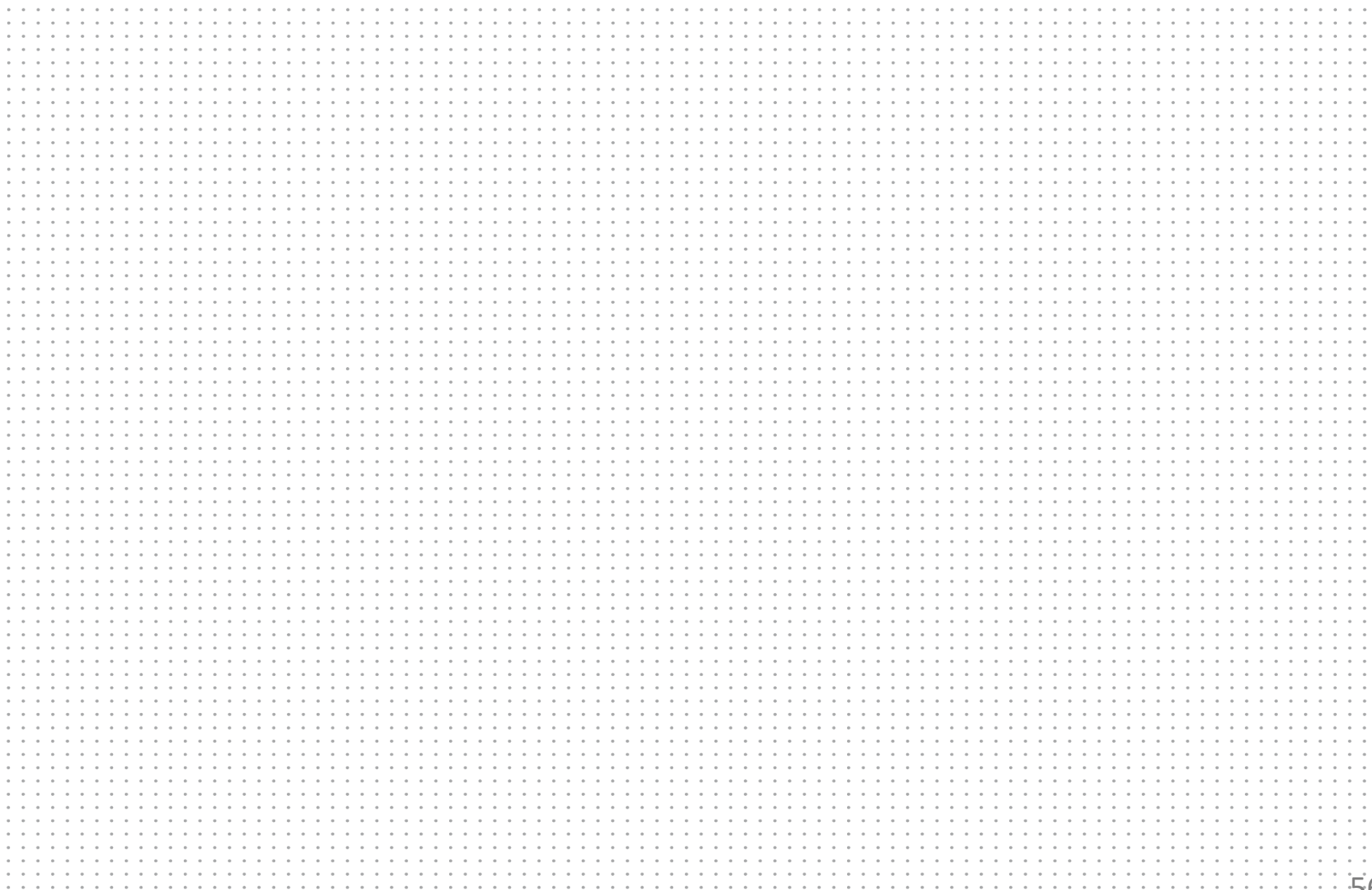
2. Feels then Facts...



A large rectangular area filled with a grid of small, evenly spaced dots, resembling graph paper or a dot grid. This area is intended for taking notes or drawing.



4 P's of Difficult Conversations™



Preparation

Issue: *Not filling out job cards properly*

1. Detail of problem **Be Specific – one issue**

Not filling out job cards properly on multiple jobs, photos are missing, QA checklist not filled out, uses text language and not very detailed. Makes it hard to detail the invoice for the clients.

5. Anticipations

- *Needed to get to next job.*
- *Busy so was going to do at home after the day was done.*
- *Forgot / Had XYZ on my mind.*
- *Thought you'd know what I meant by that.*

2. When this...

When you don't fill in the job cards using the documented process that we have in place.

6. Value breached

*Quality comes first
Great Experiences*

3. I feel... **Impact**

I feel this impacts the ability for others to do their job well. It makes the admin team ask more questions to different people that could have been answered already & it slows down invoicing.

7. Commitment wanted from them

Do job cards properly per QA checklist before leaving site on all jobs.

4. I need...

I need you to fill in your job cards before you leave the job site, so the detail is clear with photos and the QA checklist completed.

8. Commitment from you

Tweak form template for ease of use.

Preparation

Issue: *Coming to work late*

1. Detail of problem **Be Specific – one issue**

Showing up at work late, multiple times or showing up without uniform and not being prepared to start at 7:30am when everyone else is ready to kick off.

5. Anticipations

- *Traffic was bad*
- *Tough at home with the kids and getting them to school.*
- *I should be paid for my time to travel to the workshop/site.*
- *I've had to stay late to finish a job.*

2. When this...

When you aren't at work at the required time at the start of each workday.

6. Value breached

*Honesty & Integrity
Customer Focused*

3. I feel... impact

I feel this impacts the entire team and the clients we have as everything becomes delayed. Sometimes it could be that you miss detail from a meeting, or you show up late to a job. This can't be billed and makes it confusing for the admin team and is a poor experience for our clients.

7. Commitment wanted from them

Leave early enough to beat the 7am traffic. Prep your uniform the night before since you're not a morning person. Communicate on the occasion that you might be late so we in the office can be aware and prepare.

4. I need...

I need you to be prepared to start at 7:30am each day with your uniform on and ready to dive into the first task of the day.

8. Commitment from you

On the odd occasion they may be late, organise the back up plan and pass on to the admin team.

Preparation

Issue: *Smelly uniform*

1. Detail of problem **Be Specific – one issue**

Coming to work with a uniform that smells like it hasn't been washed in weeks. This has happened on 3 occasions over the past week and has been noticed by the admin team and a customer.

2. When this...

When you wear a uniform that hasn't been washed in days...

3. I feel... impact

I feel this impacts the perception of the clients and our team. When we show up to work or to a job site, our uniform is our brand. If the uniform hasn't been washed and it smells like a sewer or perspiration, your teammates won't want to be around, and our customers won't want us back.

4. I need...

You to wash your uniform after each use. You have 5 shirts and 5 pairs of shorts; you only have to do this once per week.

5. Anticipations

- *Struggle to use the washing machine.*
- *Don't know how to wash clothes.*
- *Really busy with sport in the evenings or on Saturday.*
- *I do wash them, they just come out smelly for some reason...*

6. Value breached

World Class

Customer Focused

7. Commitment wanted from them

Wash clothes weekly with washing detergent/powder and air them out to dry or use a dryer so they don't stay wet for long.

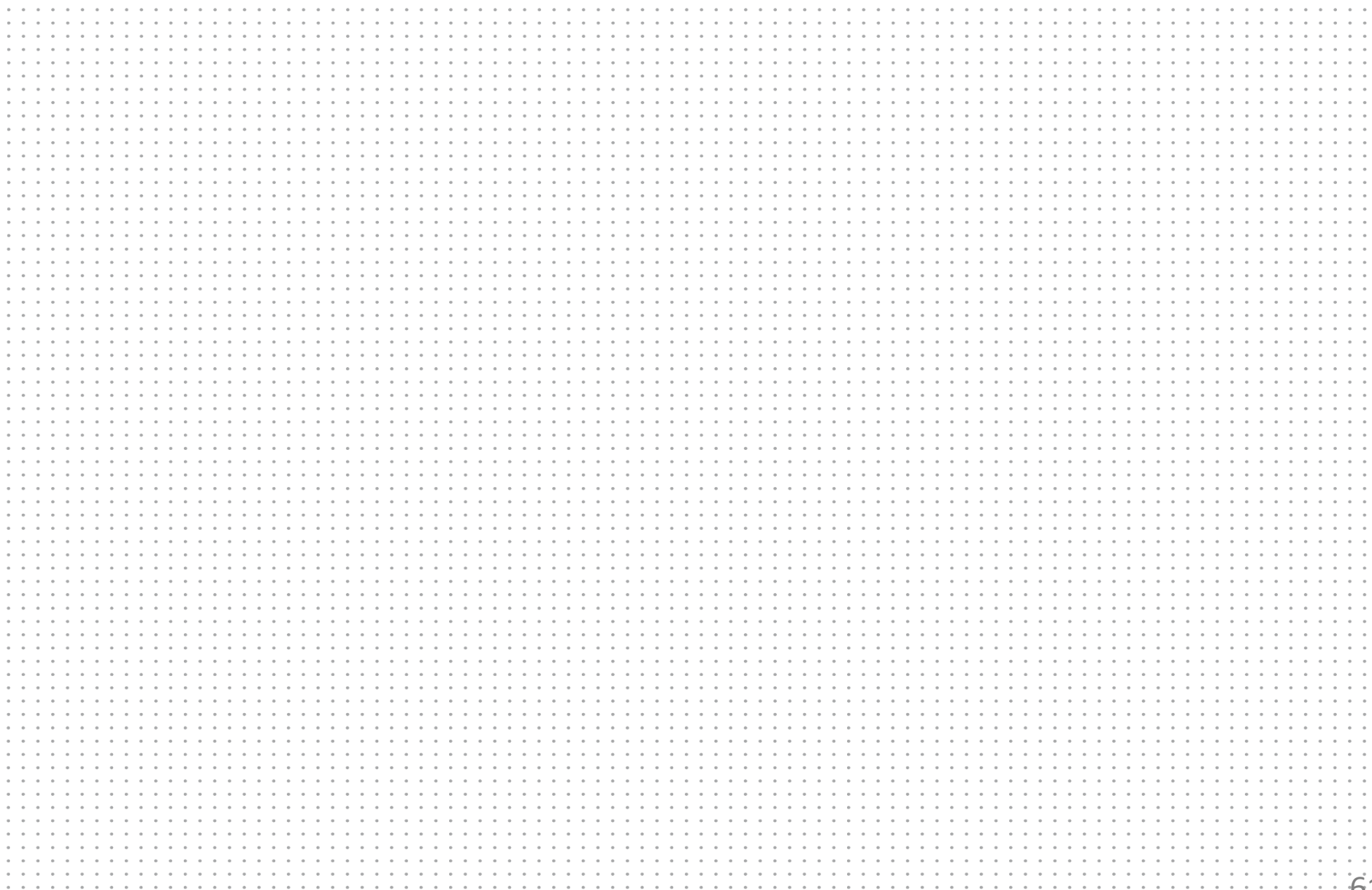
8. Commitment from you

Provide new uniform yearly and an opportunity to buy extras if needed. Give feedback straight away if not up to scratch.

Preparation

Issue: _____

1. Detail of problem <i>Be Specific – one issue</i>	5. Anticipations
2. When this...	6. Value breached
3. I feel... <i>impact</i>	7. Commitment wanted from them
4. I need...	8. Commitment from you



Practice - Script

STEP 1 CONSENT & PRE-FRAME OFFICIAL TALK

Hey [NAME],

I'd like to have a quick chat to review something this afternoon at [TIME].

Is that ok?

TIP: Avoid the "can I have a chat with you now" so the employee isn't put on the spot.

STEP 2 EMPATHISE

How are you doing...?

What's been happening for you lately...?

STEP 3 REVIEW ISSUE WITH CURIOSITY

The other day, when you/we were PLACE/ SITUATION

I saw you...

I heard you say...

I came in afterwards and found that...

STEP 4 DESCRIBE IMPACT & EXPECTATIONS

When this...

When you...

I feel...

I need...

STEP 5 CHECK IN

What are your thoughts?

TIP: Take a curious approach without blame to understand the situation from the employees' point of view.

STEP 6 REMIND VALUES

Ok. Great. Thanks for clarifying.

Our business values (or Rules of the Game) are X, Y, Z.

Do you think that this example shows this value?

What do you think could be a better way to handle this in future?

What other ways could you think of that could show this value in other situations?

TIP: Refer the employee back to the Core Values & Rules of the Game that they agreed to uphold and ask them to reflect on how they can do better next time. If the employee struggles to understand their behaviour and how it fits with your values, you may need to explain the expectations again.

STEP 7 EXPLICITLY ASK FOR BUY IN

Do you need any help, training or support from me to ensure this is nailed?

Can I count on you for this in the future?

And can you let me know if anything gets in the way of you living up to this in future?

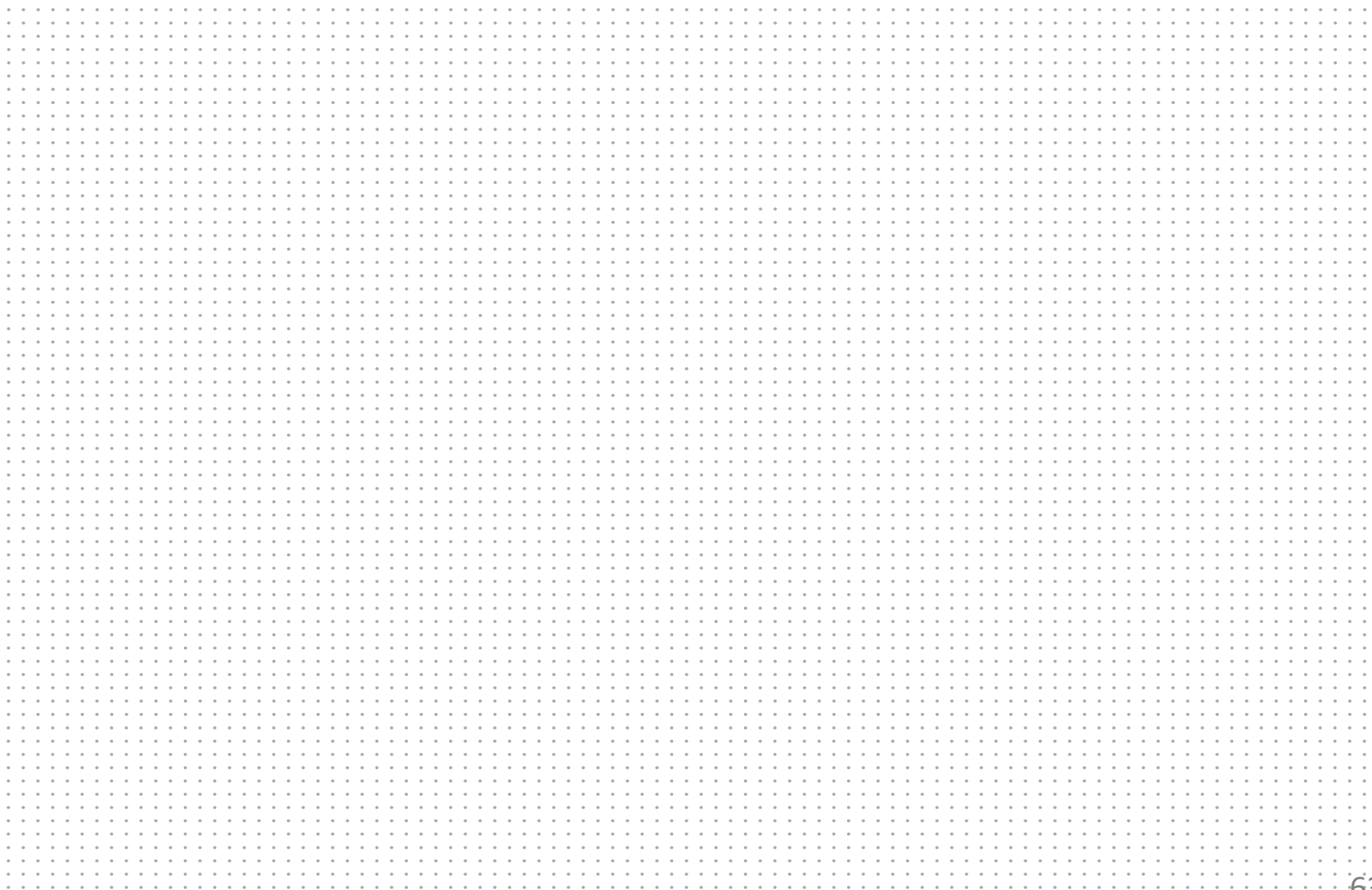
Here's what I'm going to do?

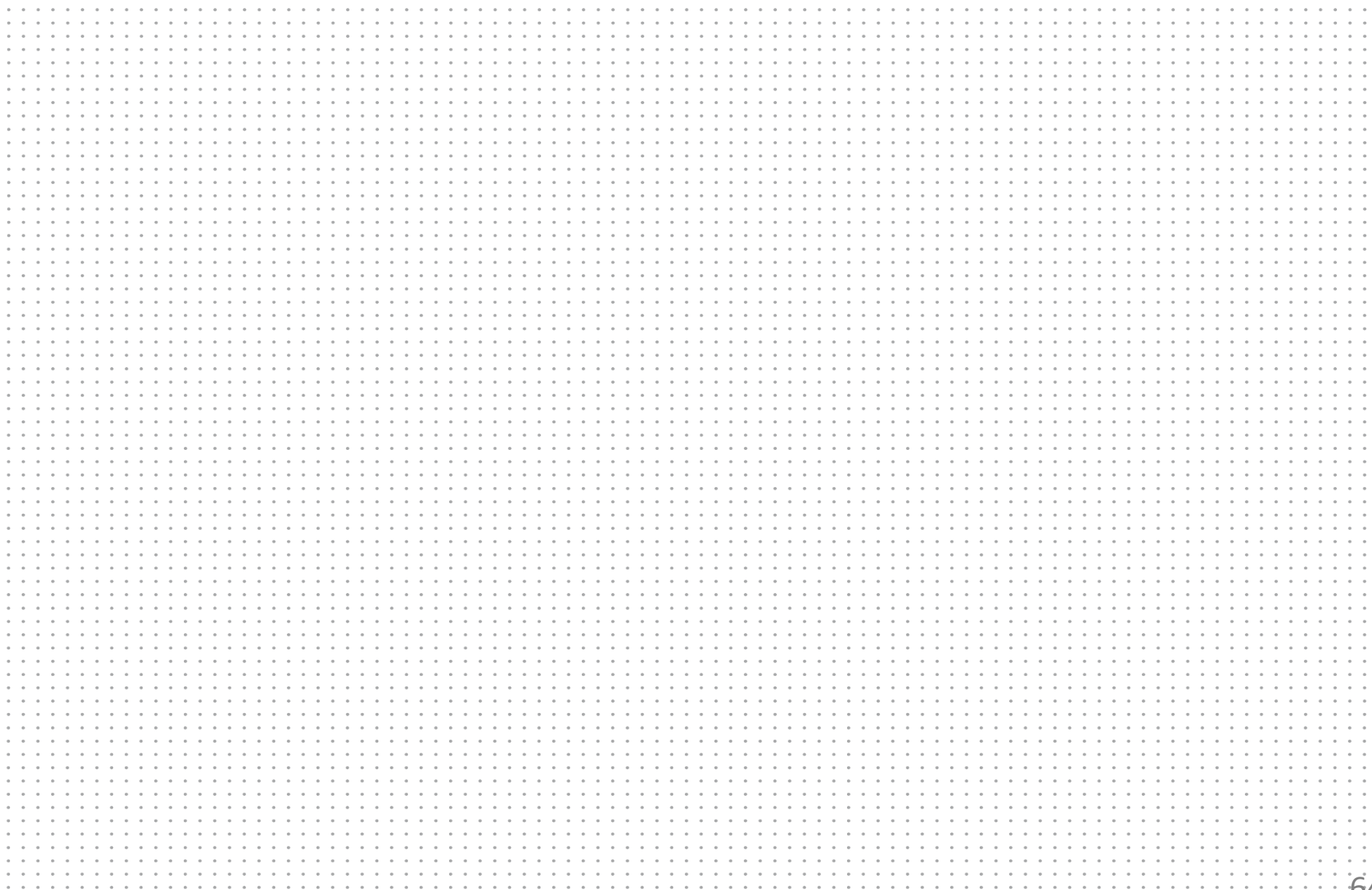
Thanks so much. Really excited to lift our game overall.

Thanks for being such a great team player.

TIP:

1. Don't address staff when you're upset or in a heightened state.
2. Write down the SPECIFIC examples as clearly as you can and how they relate to the business value and Rules of the Game.
3. Positive reinforcement of desired behaviour to create a positive atmosphere.





Post-Mortem Checklist

Create Distance

- **Walk around the block**
- **Go home**
- **Go to your office**

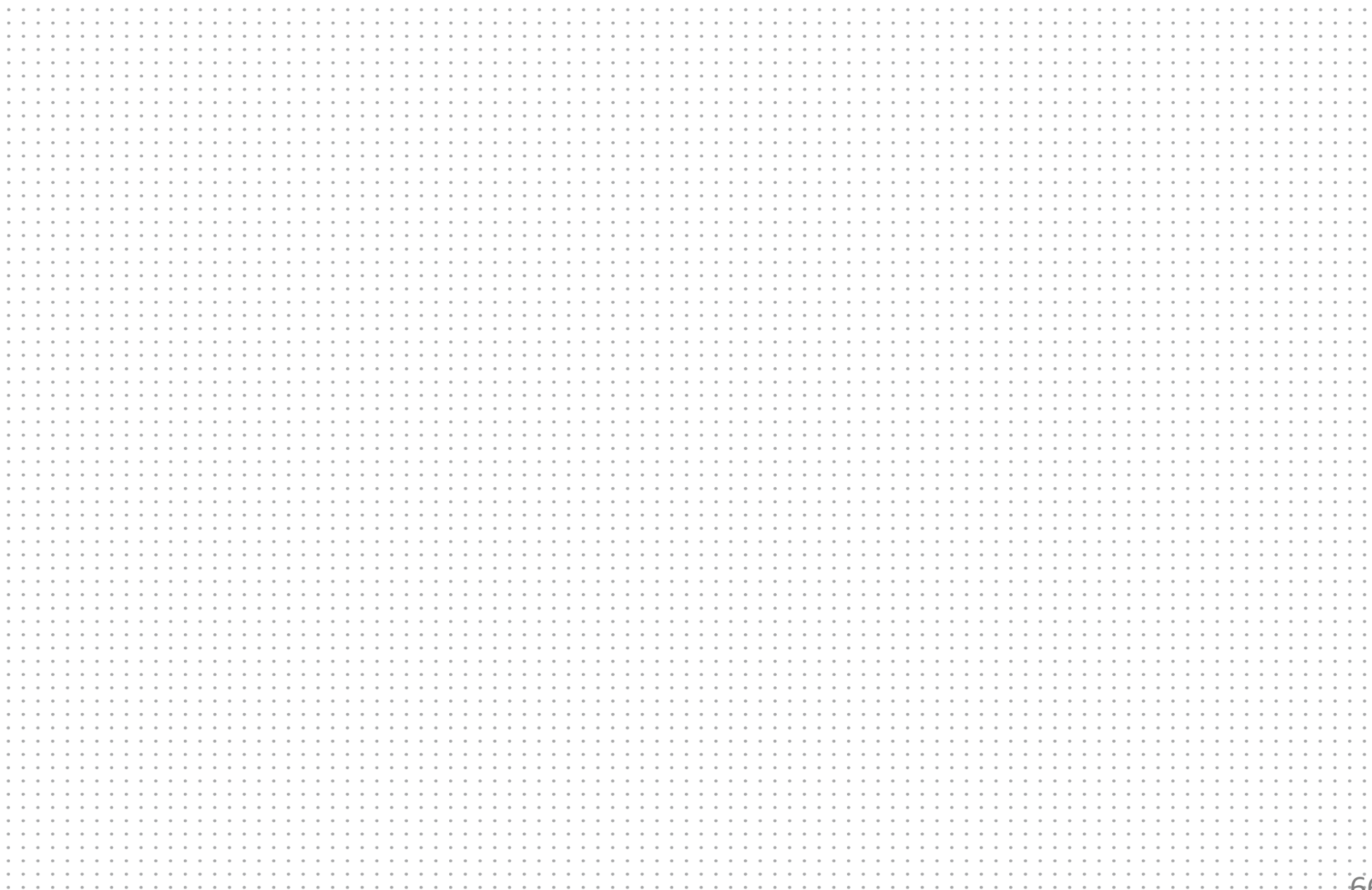
Take Time

- **Block 15 mins to unwind**
- **Breathing session**
- **Do something for me (gym, music, walk, meditation)**

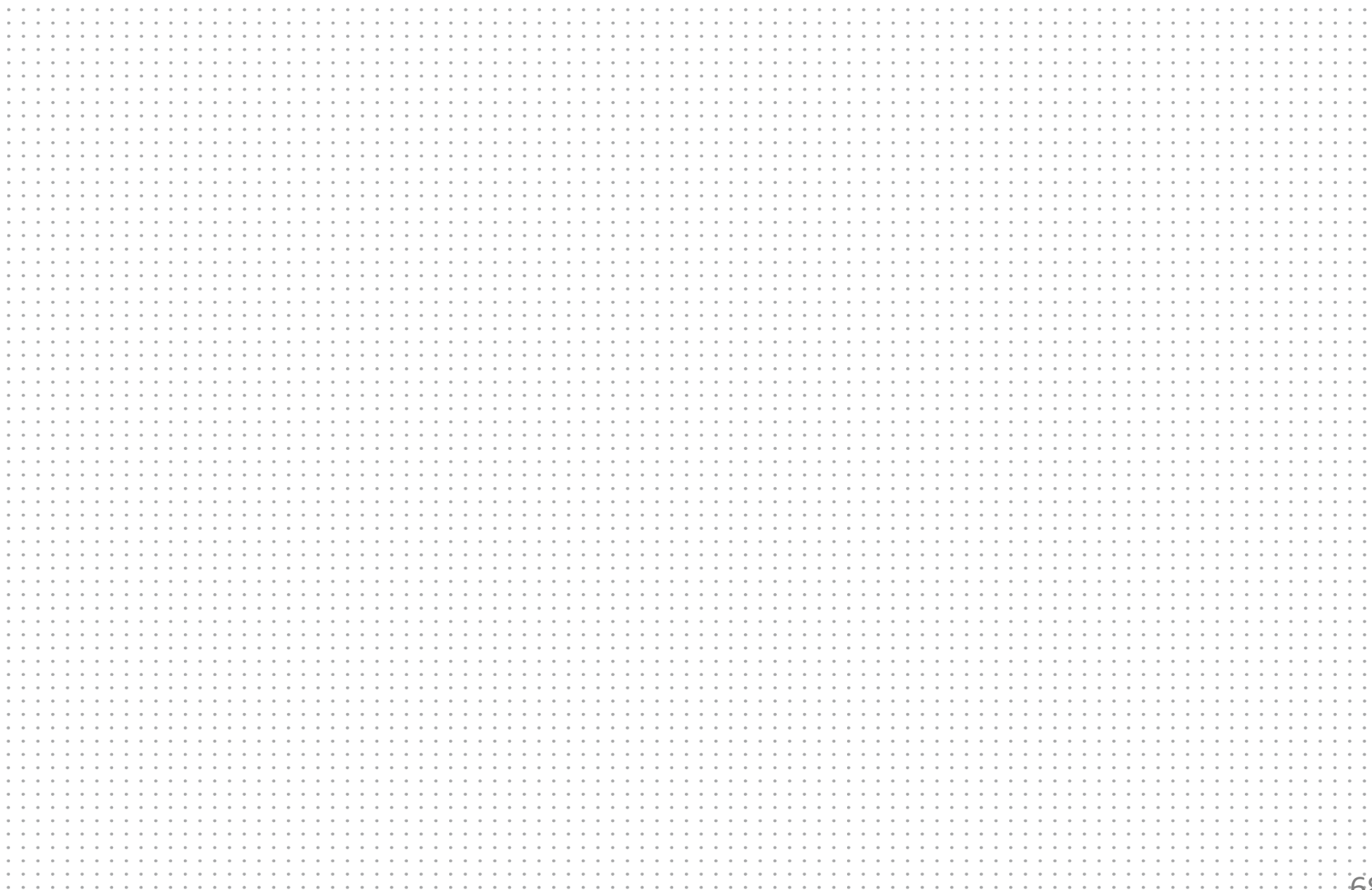
Cheer Up

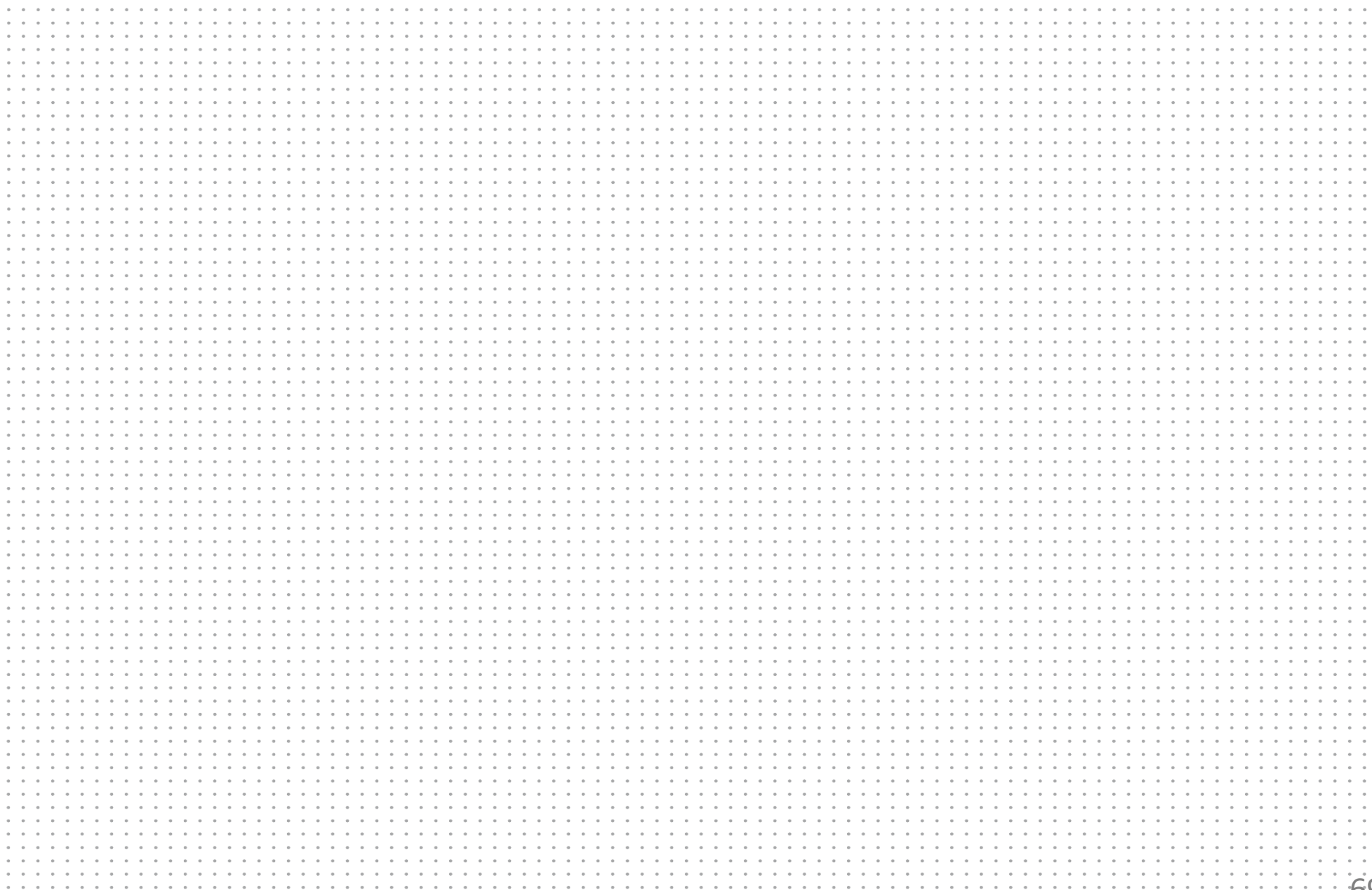
- **Speak to spouse/friend**
- **Put on favourite song/podcast/audio book**
- **Exercise (run/gym)**

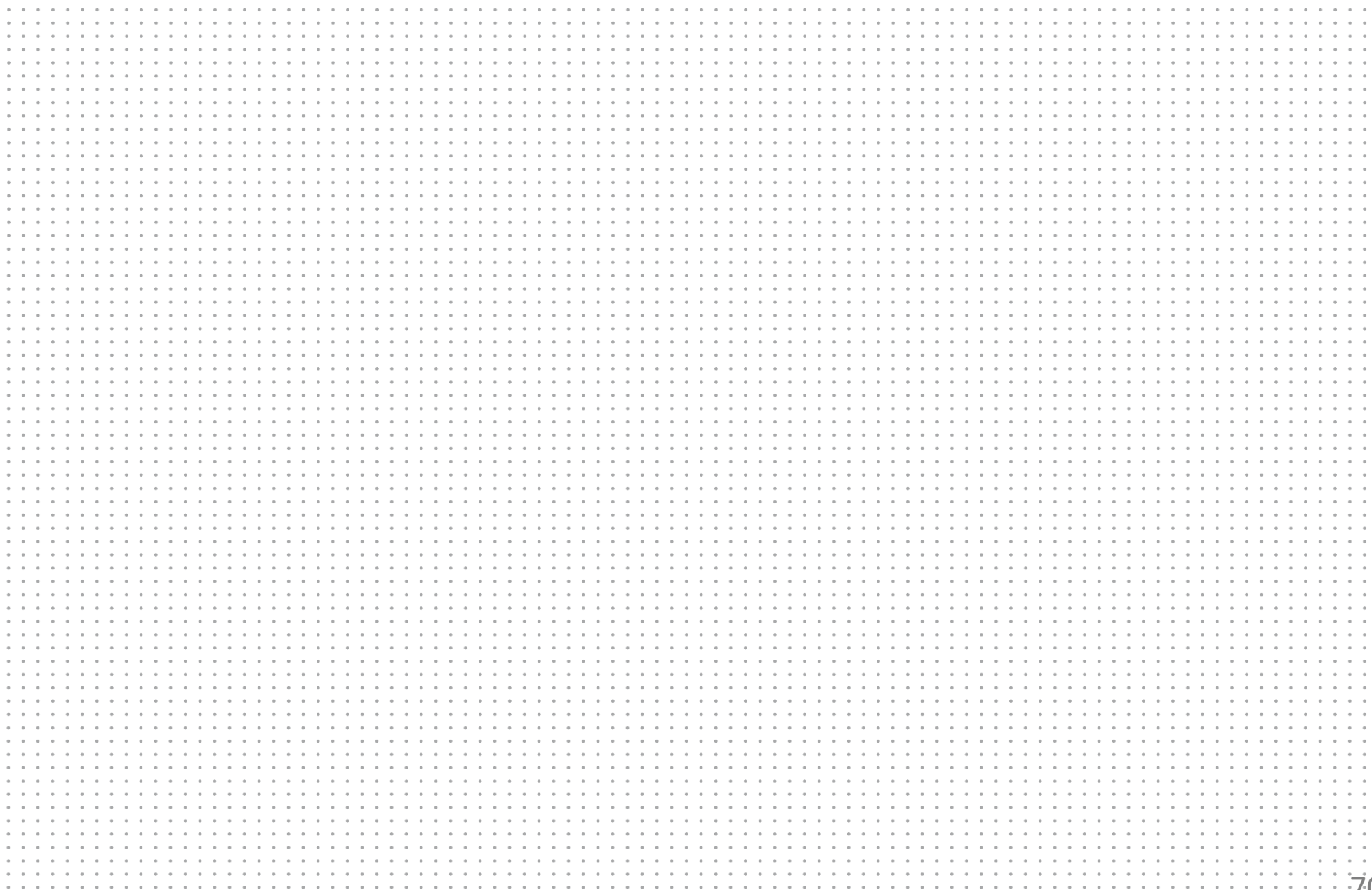
Notes



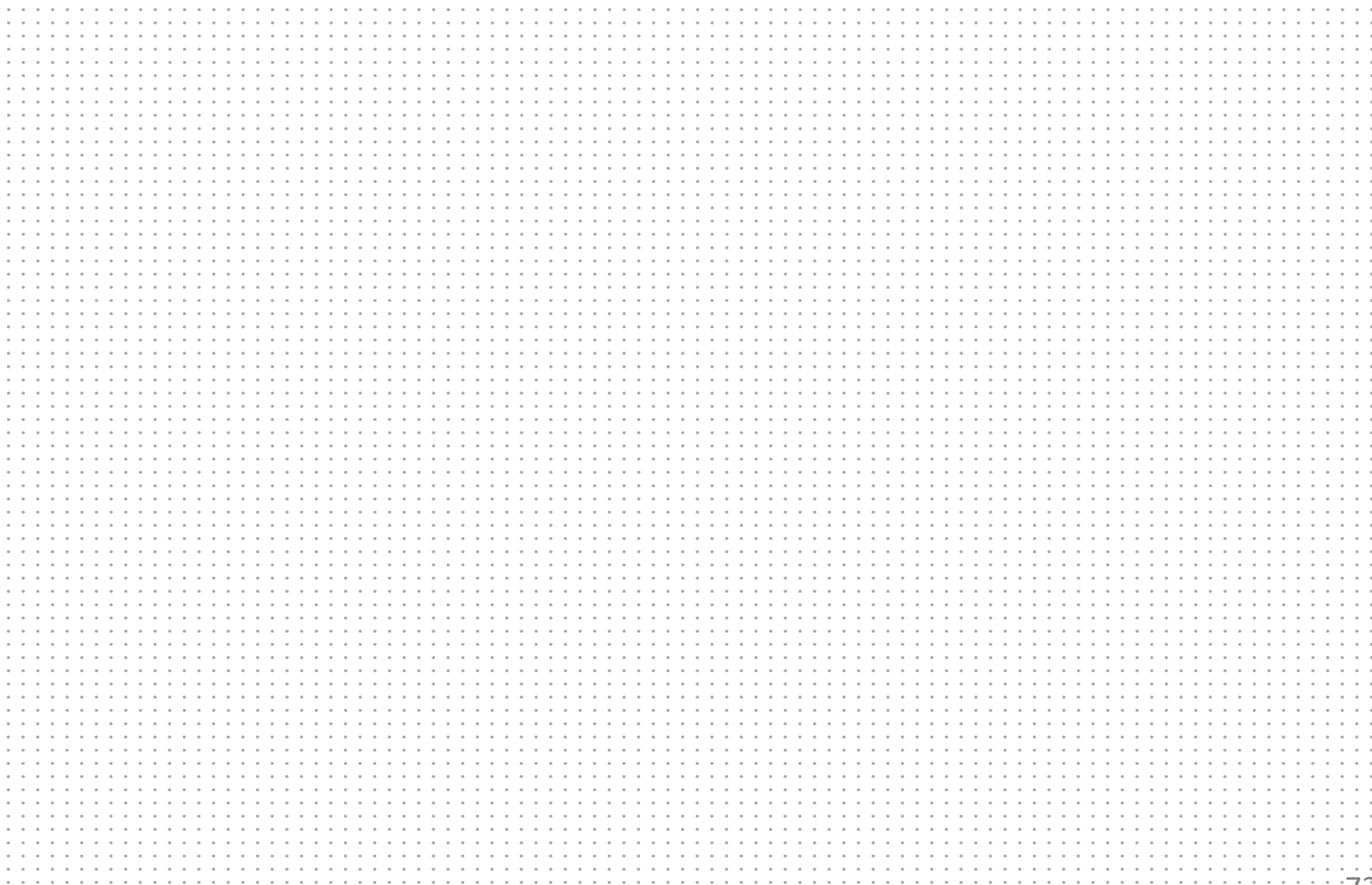
SPOTLIGHT SESSIONS



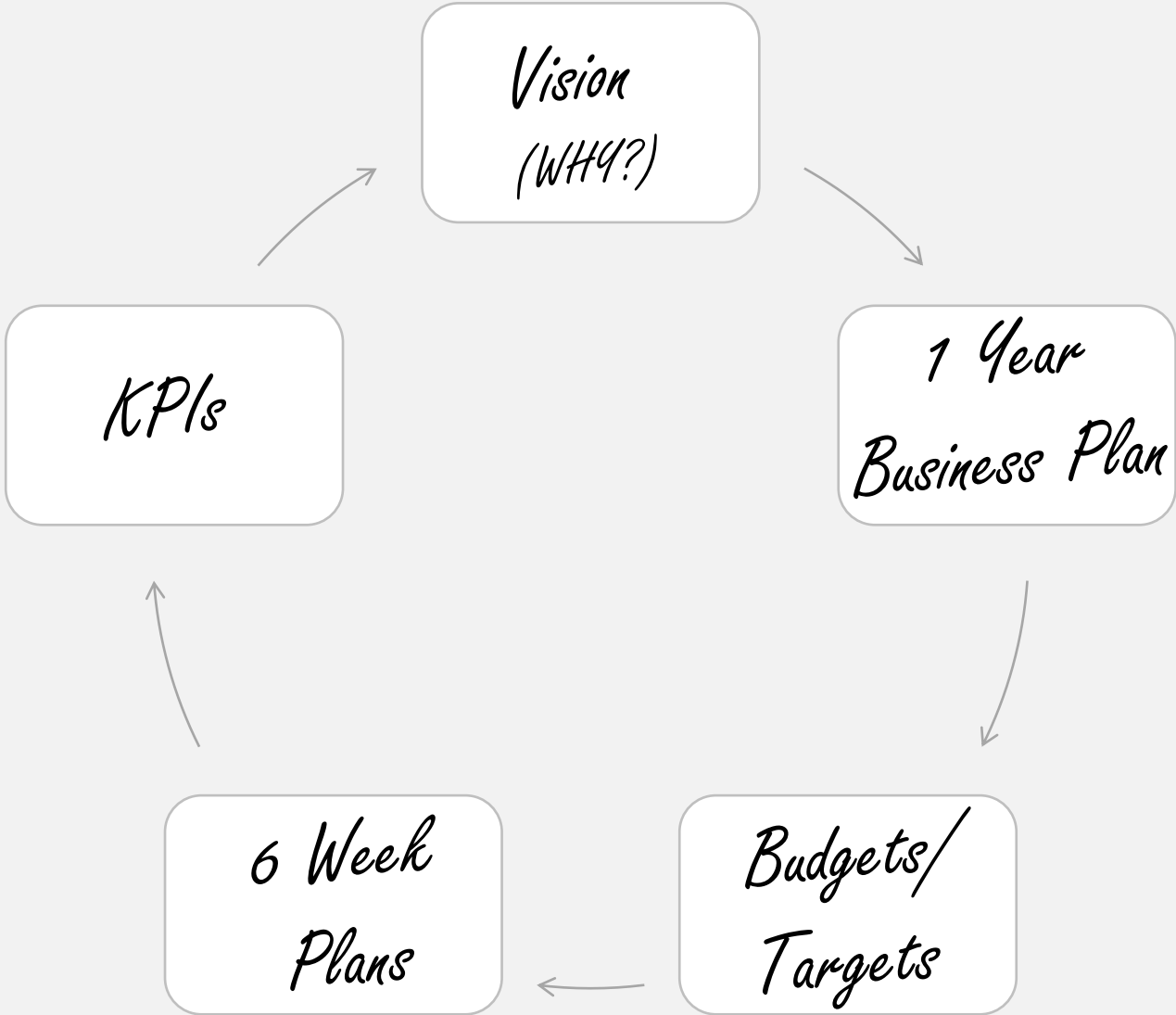




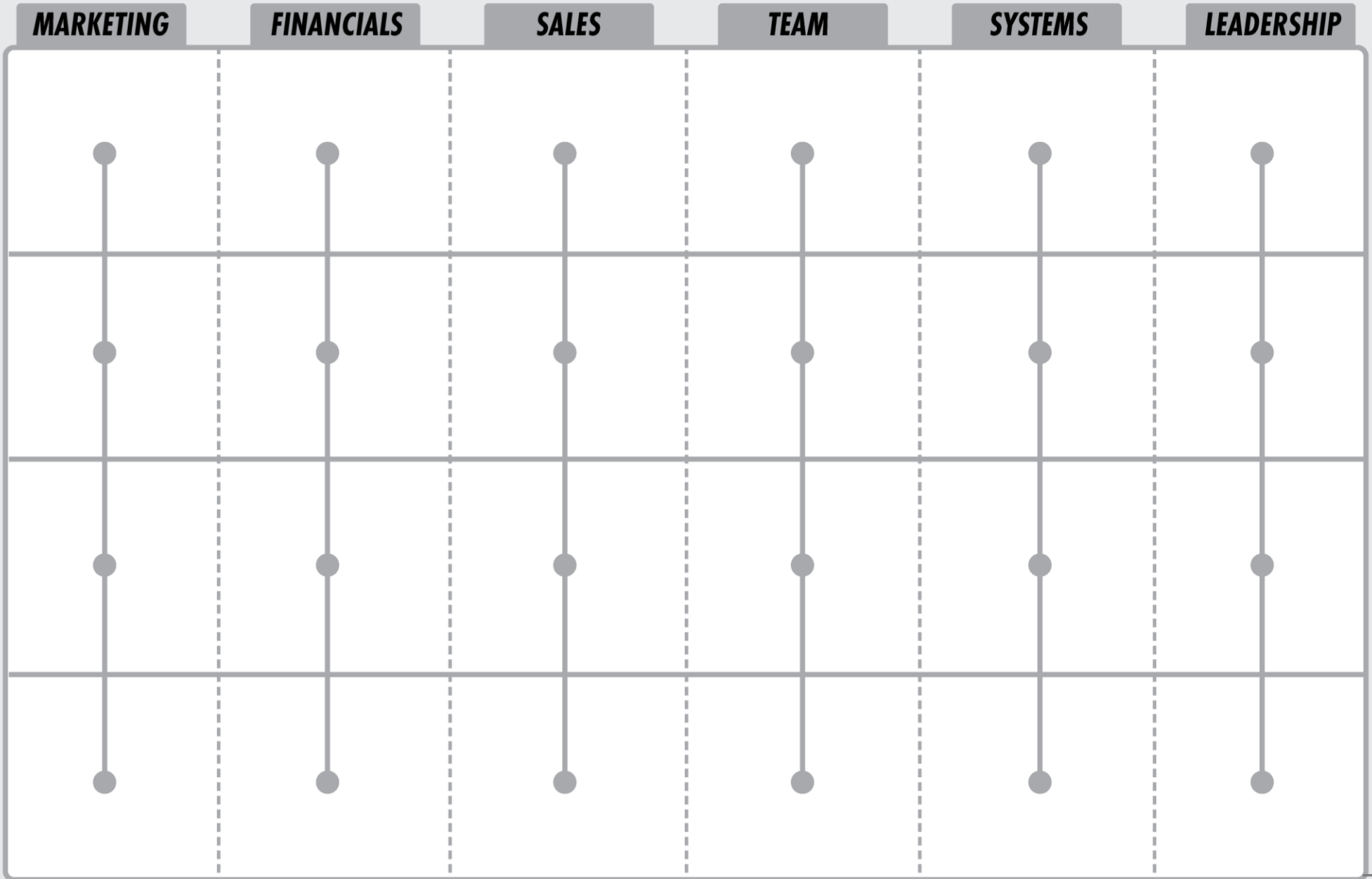
THE 6 WEEK PLANNING SESSION



The Planning Cycle



THE 6 DRIVERS

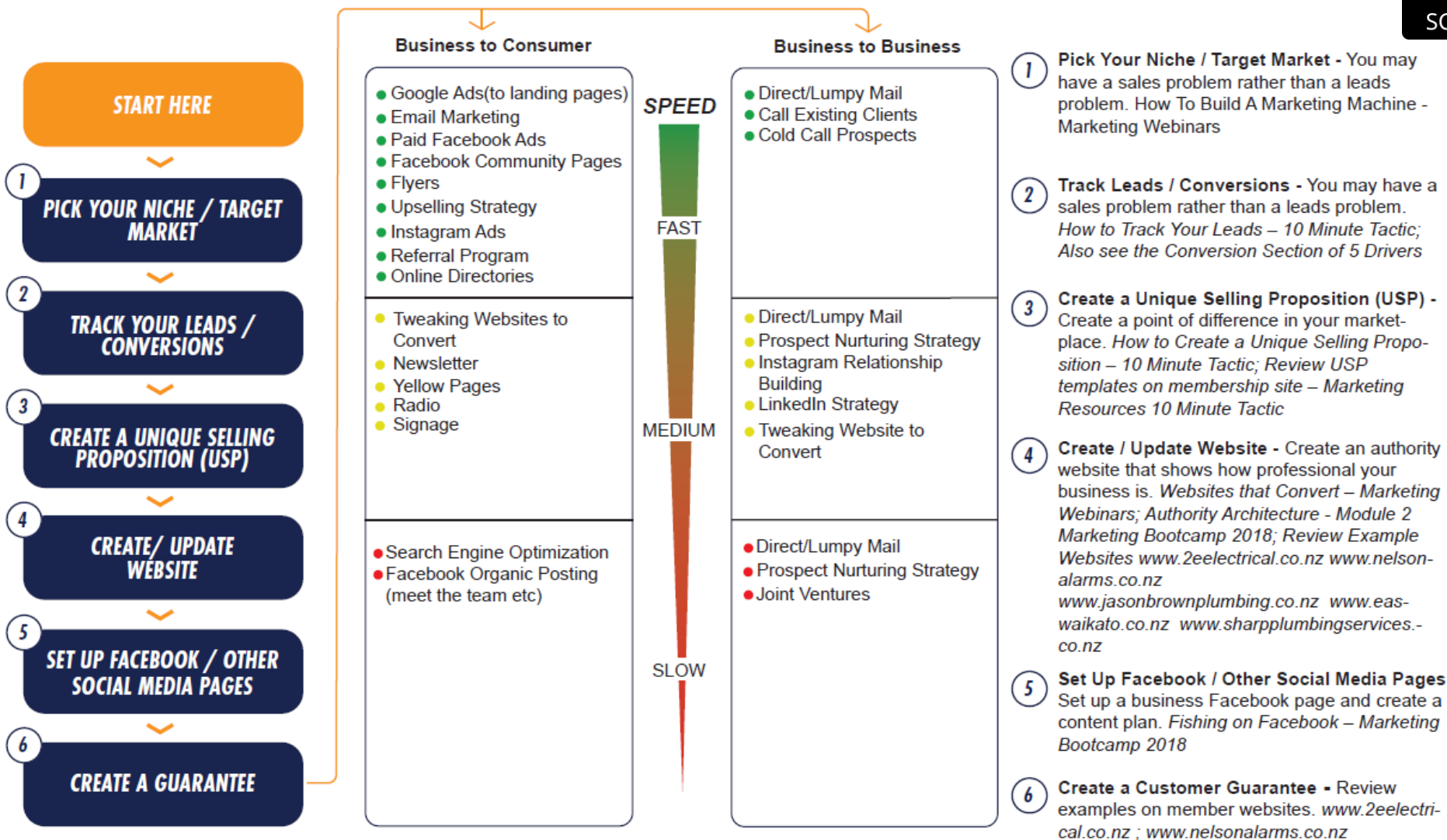


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	Become Market Authority <input type="checkbox"/>	Drive Business Equity Value <input type="checkbox"/>	Build Sales Team <input type="checkbox"/>	Create Succession Plan <input type="checkbox"/>	On-line Directory of Systems & Processes <input type="checkbox"/>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

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

CHOOSE AS APPROPRIATE

<p>Run Paid Facebook Ads Create a compelling offer using copy templates, and boost the ad to selected audiences. <i>The Facebook Lead Machine – November Bootcamp 2019</i></p>	<p>Create an Upsell Checklist Teach your team to upsell when onsite to generate more work per client and provide better customer service. <i>The Upselling Maximizer – Sales Webinars</i></p>	<p>Upgrade Building Signage Create signage that grabs attention and delivers jobs, <i>Mastering Offline Marketing – Marketing Webinars, Ask in the Facebook Group</i></p>
<p>Get Online Reviews Build credibility by developing a system to get positive online reviews (e.g. Google, Facebook, etc.) <i>Client of the Quarter – Grace Plumbing (Amelia & Brad) - The July Bootcamp 2022</i></p>	<p>Create a Company Profile Create a company profile, position yourself as a market leader and stand out from the crowd <i>The Company Profile – Sales Webinars</i></p>	<p>Instagram Marketing Set up an Instagram page and create a strategy for connecting with potential business to business clients. <i>Building Business on Instagram – Virtual Bootcamp July 2020</i></p>
<p>Run Lead Generation Magnets Create offers to secure potential client email address and details for follow up marketing. <i>Ask on the Facebook Group.</i></p>	<p>Create a Servicing Program Create a system for locking in repeat servicing work, guaranteed <i>Ask on the Facebook Group</i></p>	<p>Upgrade Site Signage Create signage that grabs attention and delivers jobs <i>Mastering Offline Marketing – Marketing Webinars, Ask on the Facebook Group</i></p>
<p>Get Testimonials (Video & Written) Capture both written and video testimonials to build trust and authority with potential clients <i>Review Getting Testimonials Guide – Marketing Resources; Ask on the Facebook Group</i></p>	<p>Create a Referral System Create a referral system to turn “word of mouth” into an actual strategy <i>Referral Marketing with Michael Griffiths – Marketing Webinars</i></p>	<p>Upgrade Vehicle Signage Create signage that grabs attention and delivers jobs <i>Post picture on the Facebook</i></p>
<p>Send a Regular Newsletter Send a regular newsletter to your database. <i>The Prospect Nurture System – Marketing Webinars, Marketing to Your Existing Clients and Prospects – Marketing Webinars</i></p>	<p>Target work through Property Managers Create a marketing strategy that specifically targets property managers <i>Win Work with Property Managers – Marketing Webinars; The Prospect Nurture System – Marketing Webinars</i></p>	<p>Search Engine Optimisation (SEO) Get your business ranking high on google search results <i>How to Get the Most from SEO – 10 Minute Tactic; Ask for providers on the Facebook Group</i></p>

MARKETING



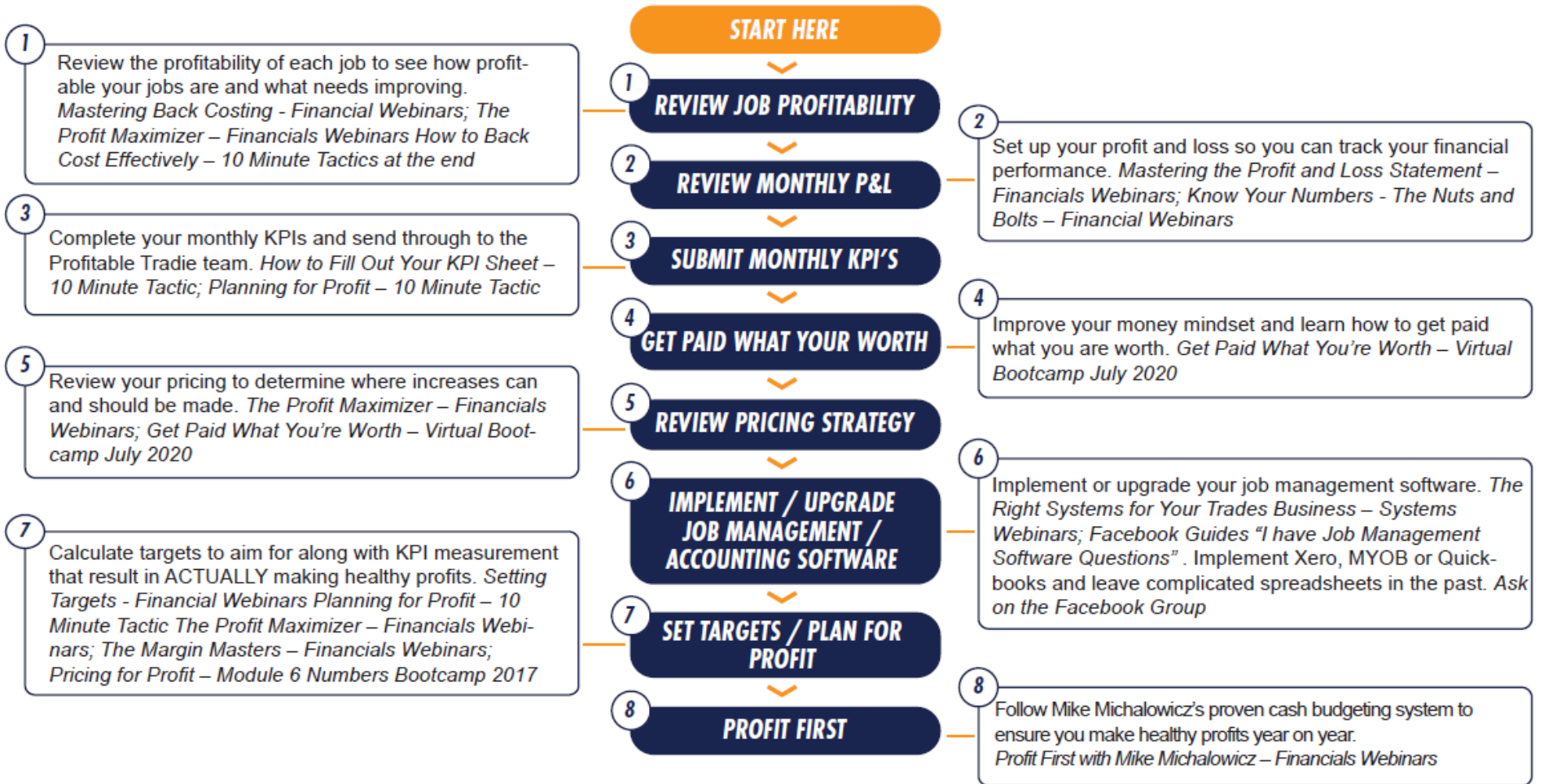
SCAN ME

CHOOSE AS APPROPRIATE

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

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.



FINANCIALS (PROFIT)

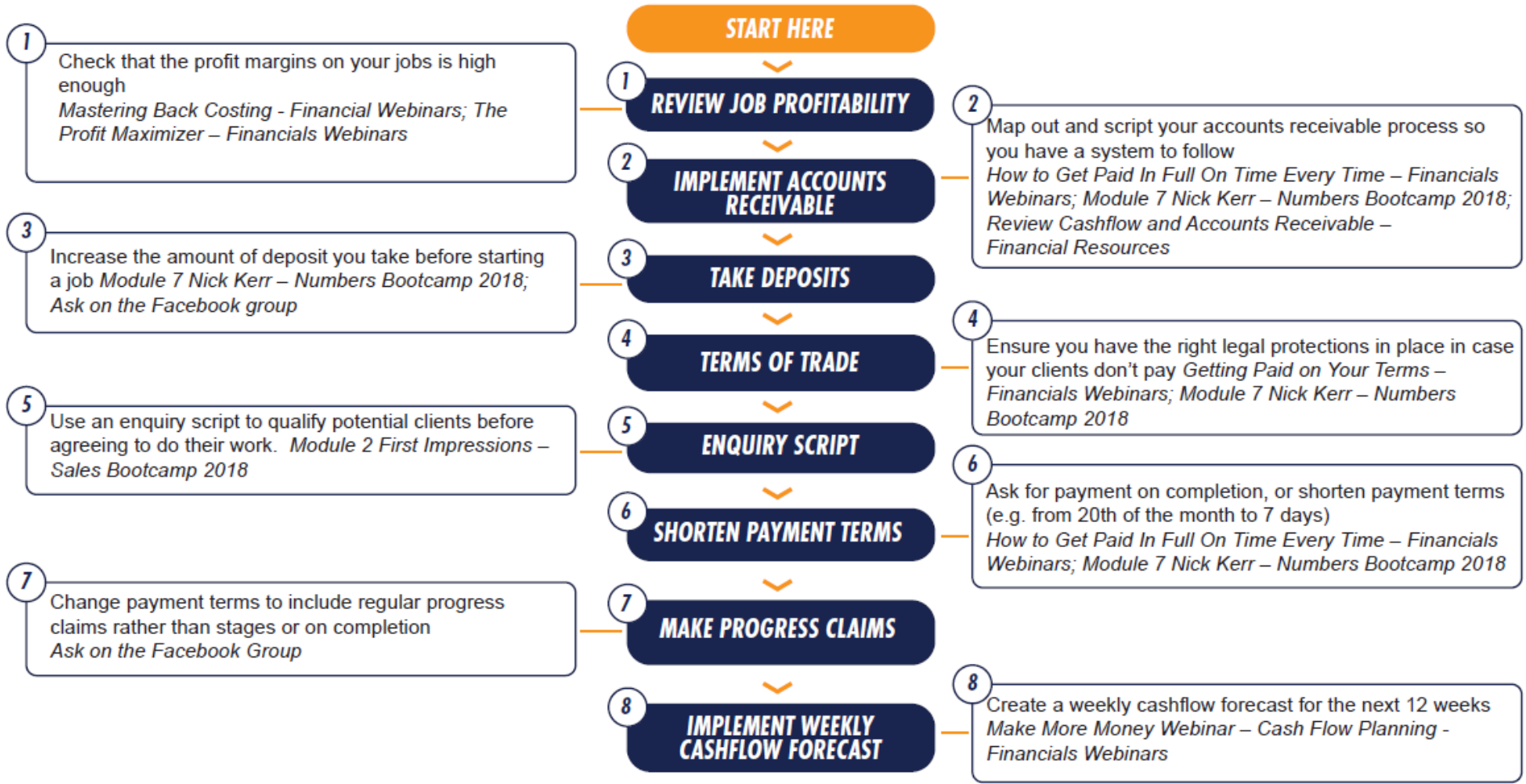


CHOOSE AS APPROPRIATE

<p>Create Fixed Pricing for Service Work Create fixed pricing templates (price book) for servicing work. <i>Fixed Pricing with Doug Brennan – Financial Webinars</i></p>	<p>Measure Work in Progress Calculate your work in progress to ensure you have an accurate monthly gross profit. <i>Module 5 Telling the Story – Numbers Bootcamp 2018</i></p>	<p>Create a workshop stock template and complete regular workshop stock takes. <i>The Right Systems for Your Trades Business – Systems Webinars, Facebook Guides “I’m looking for Tips and Tricks that may be useful”; Brad Martin, Tradesman to Businessman –</i></p>
<p>Create Van Stock Template Create a van stock template and complete regular van stock takes. <i>The Right Systems for Your Trades Business – Systems Webinars; Facebook Guides “I’m looking for Tips and Tricks that may be useful”; Brad Martin, Tradesman to Businessman – Leadership Webinars</i></p>	<p>Implement GPS systems Implement GPS systems in your vans to track travel and time on site. <i>The Right Systems for Your Trades Business – Systems Webinars; Facebook Guides “I’m looking for Tips and Tricks that may be useful”</i></p>	<p>Hire an Estimator Delegate pricing to an Estimator to ensure pricing gets down quickly. <i>How to Hire the Right Staff – Team Webinars; Module 5 The Right Seats – Team Bootcamp 2017; The Hiring Masters – Team Webinars</i></p>
<p>Create Sales & Expenses Budget Plan full year budget so you have clear targets to assess your P & L against. <i>Module 2 Set Targets - Numbers Bootcamp 2018</i></p>	<p>Use Takeoff Software 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>Calculate Break-Even Calculate the break-even sales point for your business. <i>How to Calculate Break-Even – Financial Webinars</i></p>
<p>Upgrade Your Financial KPIs Implement more KPI measures to assess business performance in greater details (e.g. weekly labour utilisation, conversion rates by market, etc). <i>KPI Selector – Financial Resources; Ask on the Facebook Group</i></p>	<p>Complete Regular Stocktakes Regularly measure stock holding to calculate true materials expenses and get clear on margins. <i>Stock Management - Systems Webinars Facebook Guides “I’m looking for Tips and Tricks that may be useful”; Brad Martin, Tradesman to Businessman – Leadership Webinars</i></p>	<p>Hire/Appoint a Pricing Assistant Promote or hire someone to help with pricing more simple jobs and/or doing the leg work on larger jobs. <i>How to Hire the Right Staff – Team Webinars; Module 5 The Right Seats – Team Bootcamp 2017; The Hiring Masters – Team Webinars</i></p>
<p>Create Pricing Templates/Pre-Built Prices Create pricing templates for larger jobs to improve the speed and accuracy and margins of quoting. <i>Systemise your Pricing – Business of Business Bootcamp 2019</i></p>		

FINANCIALS (CASH)

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



FINANCIALS (CASH)



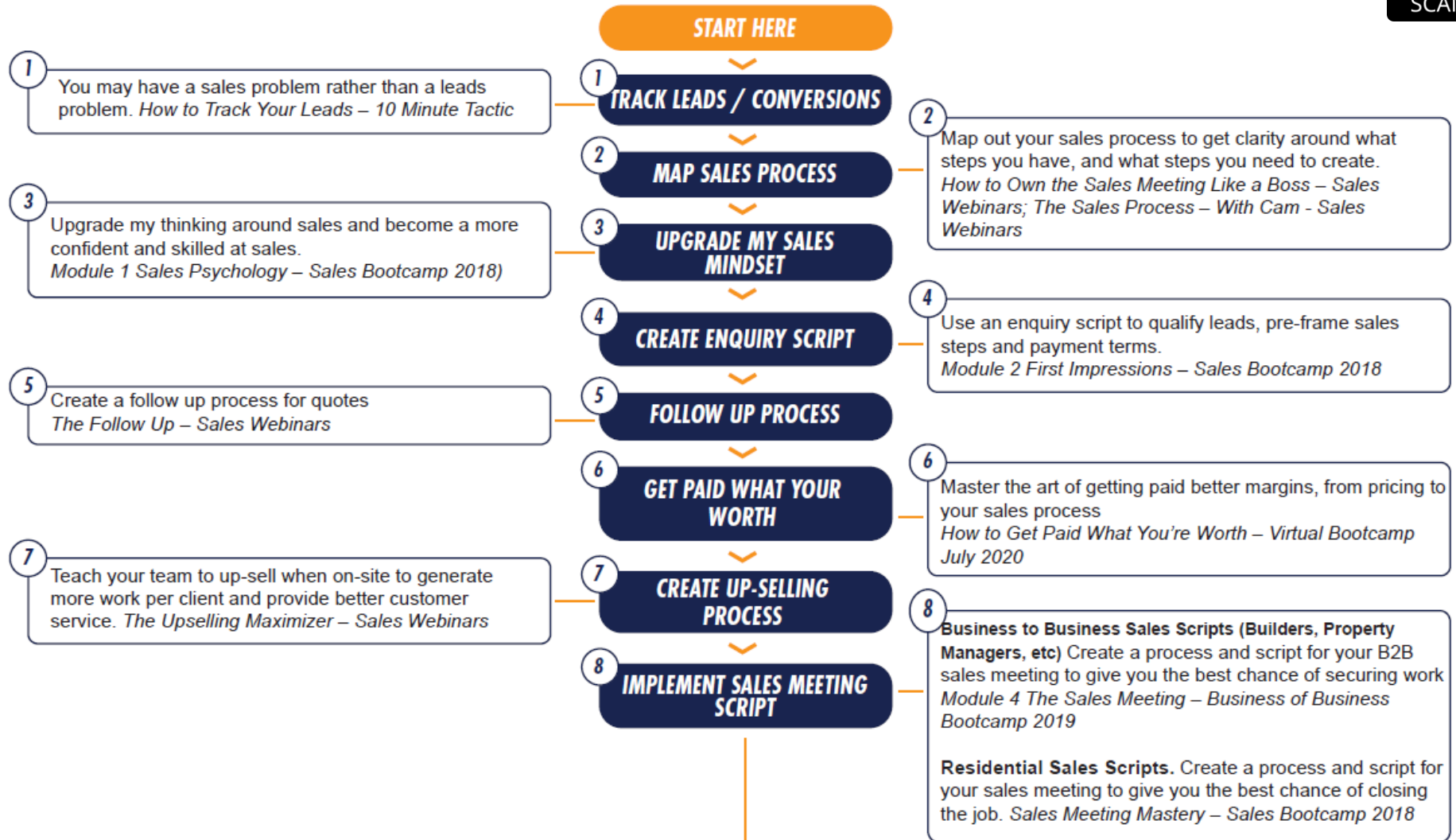
SCAN ME

CHOOSE AS APPROPRIATE

<p>Hire Additional Administration Help Improve the speed of invoicing by getting more help to complete your invoices <i>How to Hire the Right Staff – Team Webinars;</i> <i>How to Get Your Office Running Like a Well-Oiled Machine – Systems Webinars</i></p>	<p>Toughen Up Asking for Money Mental roadblock for many people. But crucial to conquer <i>How to Get Over the Fear of Asking to be Paid - Mindset Webinars</i></p>	<p>Delegate Invoicing Train other team members to invoice jobs out <i>How to Delegate – Virtual Bootcamp March 2020</i></p>	
<p>Create an Emergency Fund Set aside at least three months operating expenses as cash reserves <i>Profit First with Mike Michalowicz - Financials Webinars</i></p> <p>Review other Cash Expenses Review your balance sheet for other cash costs such as loan principal repayments, outstanding debts to merchant/tax office, extra drawings, etc. that don't appear in your P&L <i>Mastering the Profit and Loss Statement – Financials Webinars:</i></p>	<p>Deal with Invoicing Complaints Create a script and process to deal with clients who complain about their invoice <i>How to Deal with Invoicing Complaints – 10 Minute Tactic</i></p> <p>Utilize Your Job Management Software 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>Negotiate Payment Terms Negotiate a suitable payment arrangement with for outstanding accounts (e.g. Tax, Merchants etc.) <i>Ask on the Facebook group</i></p> <p>Provide Finance Organize a finance provider that your clients can use to pay for their jobs <i>Ask on the Facebook group; Facebook Guides “Consumer Finance and Payment Terms”</i> <i>Increase Sales with Consumer Finance with Barry Stott - Sales Webinars</i></p>	
<p>Overdraft or Line of credit Set up an overdraft or line of credit with your bank. <i>Ask on the Facebook group</i></p>		<p>Debt Collection Agency Set up an account with a debt collection agency <i>Facebook Guides “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.



CONTINUED...

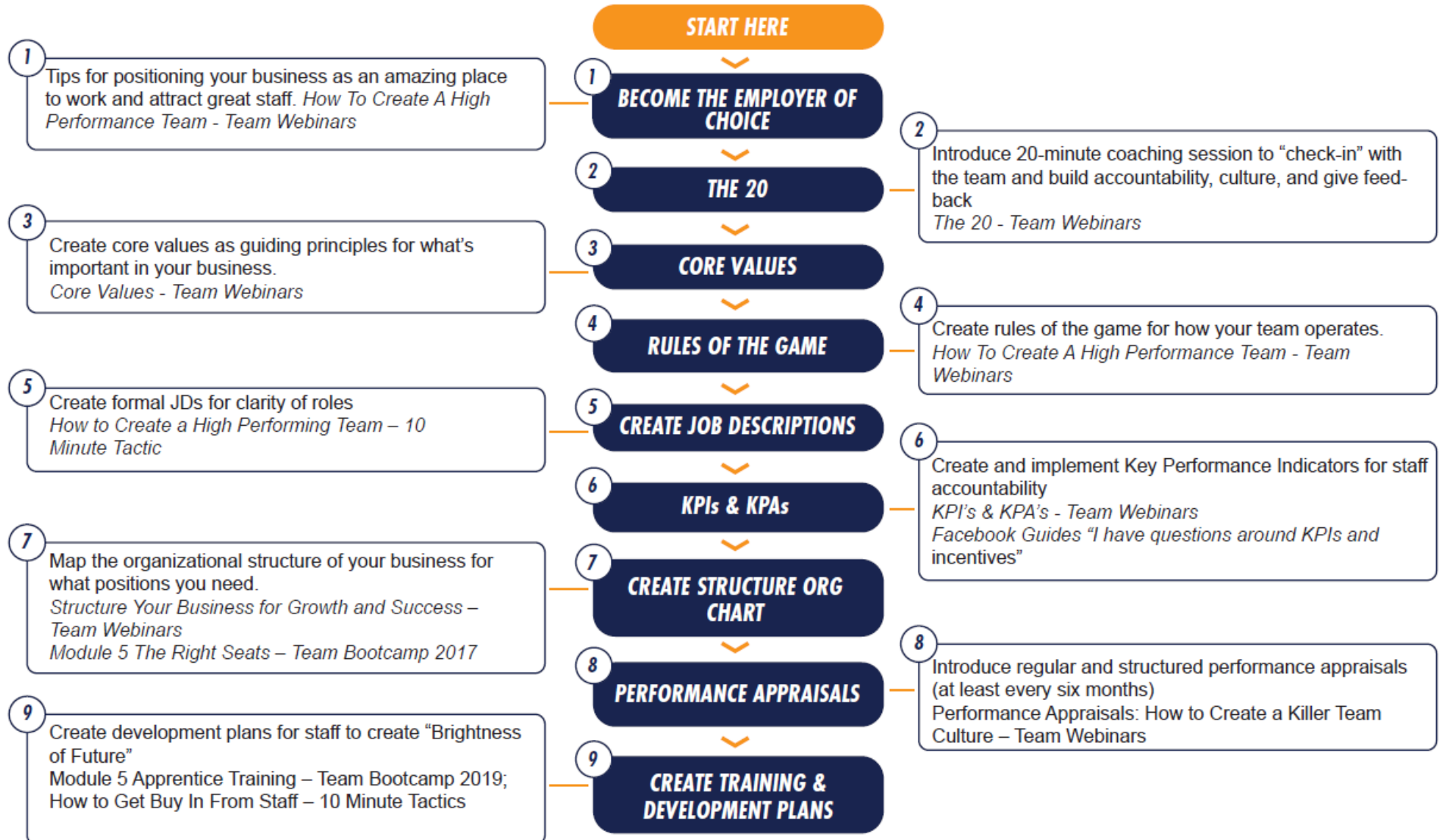
SALES



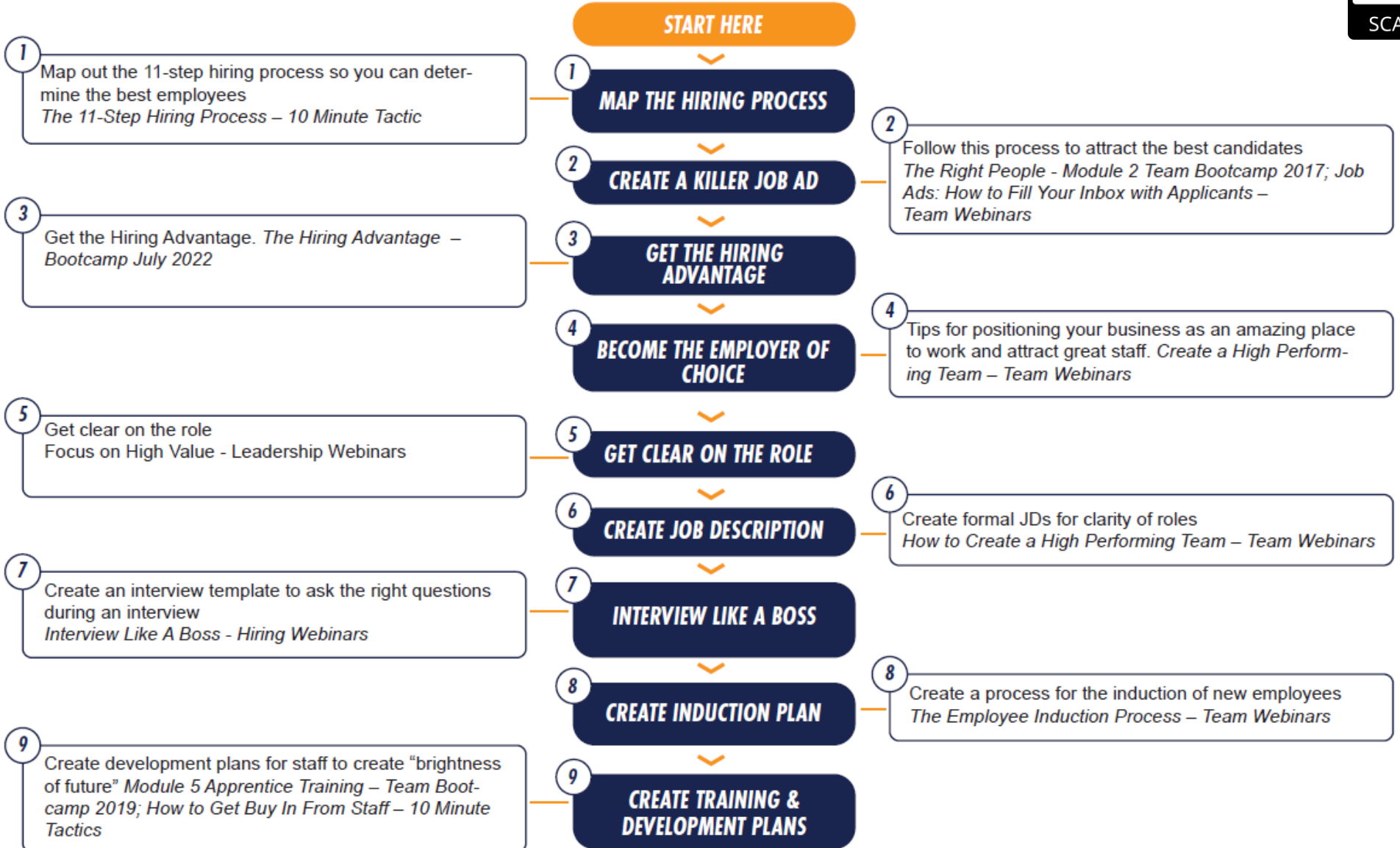
CHOOSE AS APPROPRIATE		
<p>Implement a Triage Call For larger jobs use a triage call to qualify leads, pre-frame sales steps and payment terms prior to the site visit <i>How to Get Paid What You're Worth – Virtual Bootcamp July 2020</i> <i>The Triage - Sales Bootcamp 2018</i></p>	<p>Create a “Wow” Marketing Pack Create a package to “wow” potential clients during your sales process and stand out as an authority <i>Marketing Business to Business – Marketing Webinars; The Company Profile – Sales Webinars</i></p>	<p>Get Testimonials (Video and Written) Capture both written and video testimonials to build trust and authority with potential clients. <i>Review Getting Testimonials Guide – Marketing Resources</i> <i>Ask on the Facebook Group</i></p>
<p>Use a Virtual Quoting Process Have a process for giving people quotes virtually by video call. <i>Ask on the Facebook Group</i></p>	<p>Use a Quote Request Form Create a quote request form to qualify and pre-frame to prospective clients. <i>Review the Membership Site - Sales Resources; Quote Preparation and Delivery – Sales Resources</i></p>	<p>Use a Virtual Sales Presentation Run sales meetings and present quotes virtually using tools like Zoom. . <i>Ask on the Facebook Group</i></p>
<p>Visual Sale Presentation Create a visual sales presentation to use when doing site visits of presenting quotes <i>Visual Sales Presentation – Sales Resources; Quote Preparation and Delivery – Sales Resources</i></p>	<p>Client Questionnaire Use a questionnaire to get client involved in sales process and build commitment to your solution. <i>Review Pre-Visit (value building) - Sales Resources; Ask on the Facebook group</i></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 - HIRING



SCAN ME

CHOOSE AS APPROPRIATE

<p>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. <i>The Productivity Myth - Virtual Bootcamp March 2020; How to Get Your Office Running Like a Well-Oiled Machine – Systems Webinars</i></p>	<p>Hire an Apprentice 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>Hire More Tradespeople 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>Hire an Ops Manager Recruit an Operations Manager to help with managing larger teams and quality control <i>How to Hire the Right Staff - Team Webinars; The Ops Manager Solution - Team Webinars</i></p>	<p>Implement or Upgrade Accounting Software Implement Xero, MYOB or Quickbooks and leave complicated spreadsheets in the past <i>Ask on the Facebook Group</i></p>	<p>Employee Agreements Have proper official employment agreements with staff <i>Contact local HR provider for advice</i></p>
<p>Remove my Tools from the Van Remove your tools and stop being tempted to fill the gaps yourself <i>Share a photo on Facebook</i></p>		

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*

3 Implement or upgrade your job management software. *The Right Systems for Your Trades Business – Systems Webinars; Facebook Guides “I have Job Management Software questions”*

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*

7 Use a pre-job checklist to make reduce “muck around” and save time on site *How to Systemize Your Trades Business - Systems Webinars; First Things First – Systems Bootcamp 2018; Review Pre-Job Checklists – Systems Resources*

9 Create a van stock template and complete regular van stock takes *How to Systemize Your Trades Business - Systems Webinars; Facebook Guides “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

1 **HOW TO CREATE SYSTEMS**

2 **A-Z OF OPERATIONS**

3 **JOB MANAGEMENT SYSTEM**

4 **OFFICE CHECKLISTS**

5 **ADMIN MANUAL**

6 **QA CHECKLISTS**

7 **PRE-JOB CHECKLIST**

8 **CLOCK WORK MIKE M.**

9 **VAN STOCK TEMPLATE**

8 **DO REGULAR STOCKTAKES**

2 Create a map of your businesses process from start to finish *The right systems for your trades business - Systems Webinars*

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*

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

8 *Clockwork with Mike Michalowicz - Systems Webinars*

8 Regularly measure stock holding to calculate true materials expenses and get clear on margins *Stock Management – Systems Webinars; Facebook Guides “I’m looking for tips and tricks that may be useful”; Brad Martin, Tradesman to Businessman – Leadership Webinars*

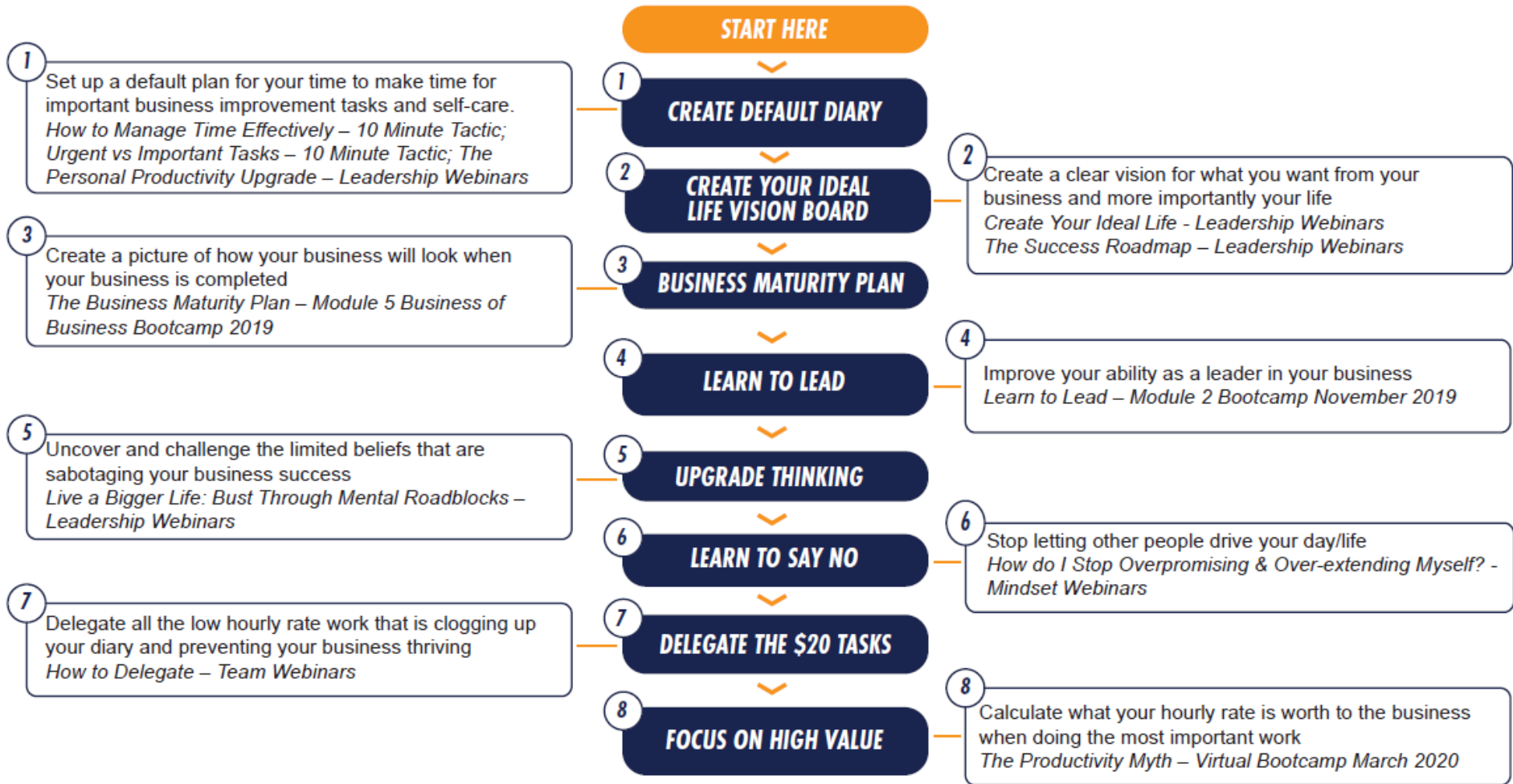
SYSTEMS



SYSTEMS - CHOOSE AS APPROPRIATE		
<p>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</p>	<p>Takeoff Software e.g. Groundplan Implement software to help with ease and accuracy of quoting and project planning <i>Groundplan Takeoff – Virtual Bootcamp July 2020</i></p>	<p>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</p>
<p>Workshop Stock Template Create a workshop stock template and complete regular workshop stock takes <i>The Right Systems for Your Trades Business – Systems Webinars; Facebook Guides “I’m looking for Tips and Tricks that may be useful”; Brad Martin, Tradesman to Businessman – Leadership Webinars;</i></p>	<p>Use a Quote Request Form Create a quote request form to qualify and pre-frame to prospective clients. <i>Review the Membership Site - Sales Resources; Quote Preparation and Delivery – Sales Resources</i></p>	<p>Apprentice Training Program Structure your apprentice training to gain focus and develop great tradespeople <i>Module 5 Apprentice Training – Team Bootcamp 2019</i></p>
<p>Use a Virtual Sales Presentation Run sales meetings and present quotes virtually using tools like Zoom. . <i>Ask on the Facebook Group</i></p>	<p>Create “Belonging” within the team Uniforms, social events, etc create loyalty and a feeling of belonging <i>Ask on the Facebook Group</i></p>	<p>Create a Holiday Shutdown Plan Ensure you are in control of your revenue, profit, workflow & team morale over holiday shutdowns Thriving Through Xmas - Systems Webinars Use the Workbook</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.



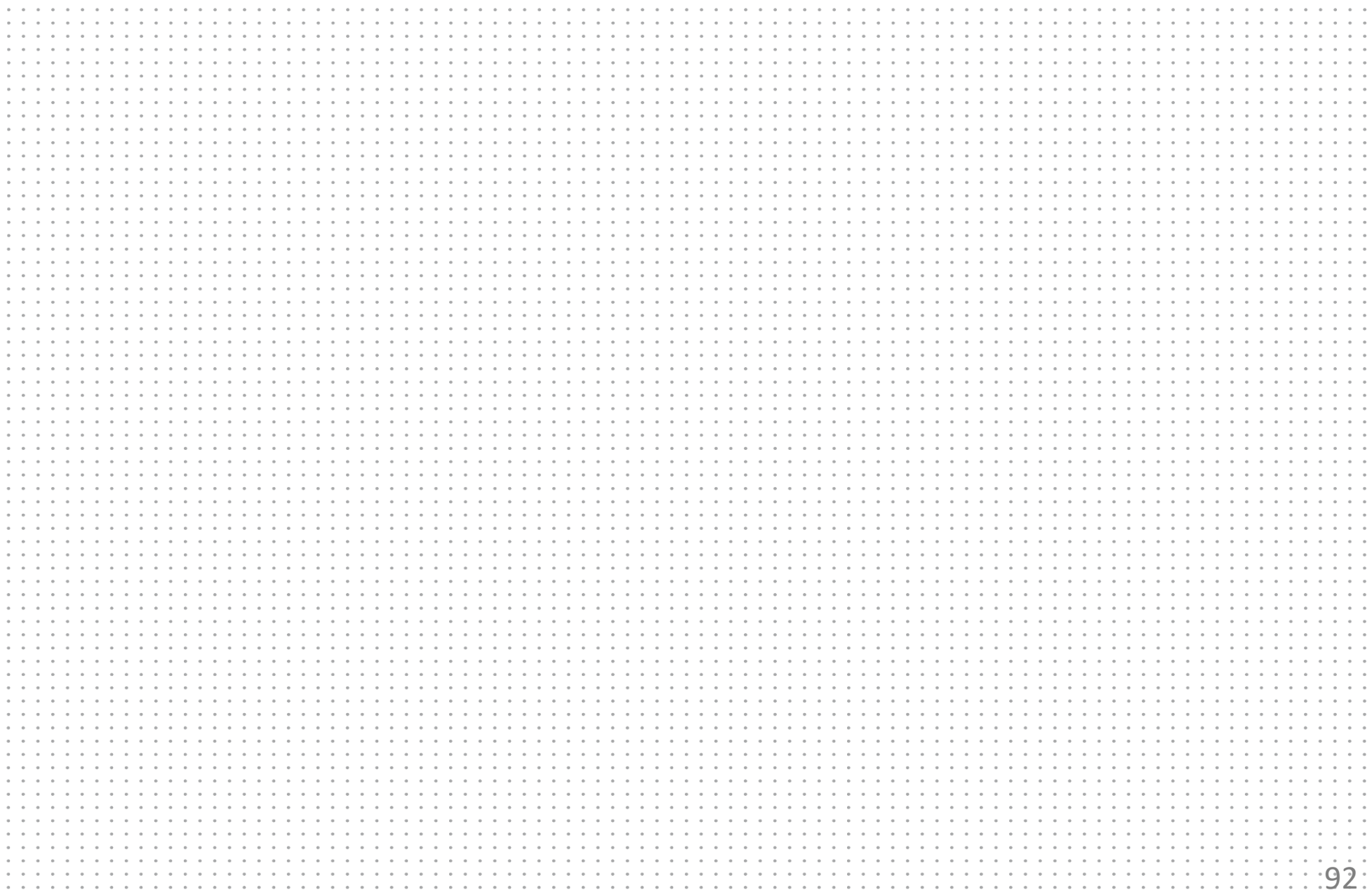
LEADERSHIP



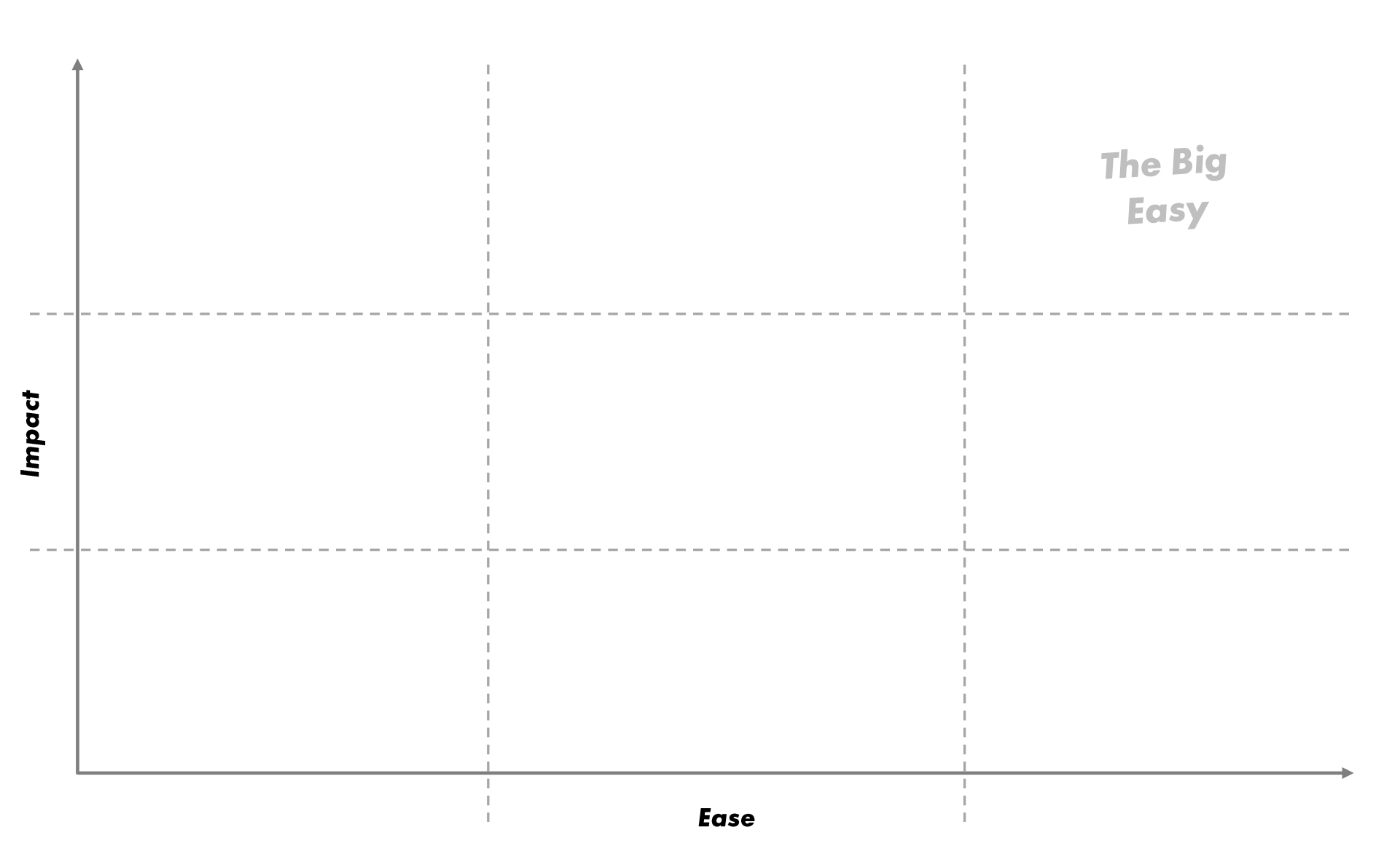
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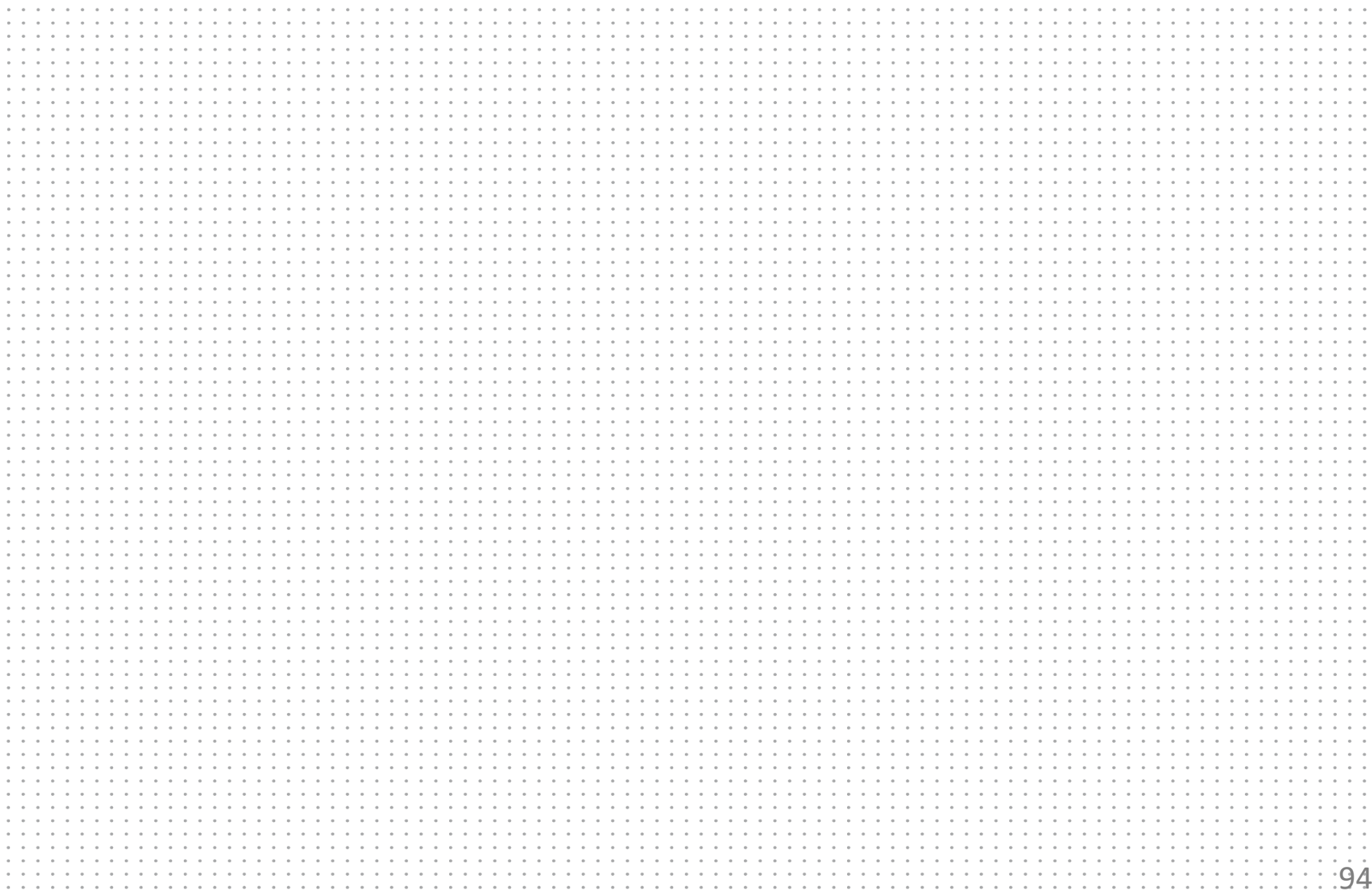
CHOOSE AS APPROPRIATE

<p>Time Productivity Analysis Measure how you are currently spending your time so you can see what the “time sucks” are <i>The Personal Productivity Upgrade – Leadership webinars</i></p>	<p>Ask for Help Commit to asking for help when stuck and not letting your ego or fear of looking silly stop you from growing <i>Ask on the Facebook Group</i></p>	<p>Schedule Me Time Block self-care and family time into your Default Diary <i>The Success Roadmap – Leadership Webinars; How to Manage Time Effectively – 10 Minute Tactic; Urgent vs Important Tasks – 10 Minute Tactic</i></p>
<p>Stop Doing List Create a stop doing list of all the things that you no longer want to do <i>The Productivity Myth – Virtual Bootcamp March 2020</i></p>	<p>Listen to/Read Business Books Commit to listening to audiobooks or reading books. <i>Ask on the Facebook Group</i></p>	<p>The Pre-Loaded Year Plan out the year with all the important activities such as holidays, team days, performance appraisals, business planning meetings, etc. <i>The Pre-Loaded Year – Systems Webinars</i></p>
<p>Affirmations Create a list of affirmations that you review daily to create a positive mental focus <i>Live a Bigger Life: Bust Through Mental Roadblocks – Leadership Webinars</i></p>	<p>80/20 Rule Apply the 80/20 rule to every area of your business. What is the 20% of time, clients, staff that if you focus on, you’ll get 80% of the results. <i>Ask on the Facebook Group</i></p>	<p>Appoint a General Manager <i>Ask on the Facebook Group</i></p>
<p>Partnerships that Prosper Learn how to build a business partnership that works for all parties – whether that be business partners and/or life partners. <i>Partnerships That Prosper – Leadership Webinars; Ask on the Facebook Group</i></p>		<p>Build Inspiration and Motivation Review the stories of other success business owners who have transformed their businesses working through the coaching program <i>Watch Client of the Quarter interviews in the membership site under each Bootcamp</i></p>



The Betting Table





The Compass

Cycle Begins _____ Cycle Ends _____

Motivation	Carrot	Stick

	Strategy Description	24-Mar	31-Mar	7-Apr	14-Apr	21-Apr	28-Apr	5-May	12-May	Completed?
1										
2										
3										
4										
5										
6										

My Next Belt Level:



\$50k+



\$100k+



\$150k+



\$200k+



\$300k+



\$400k+



\$500k+



\$750k+



\$1M+



\$1.25M+



\$1.5M+



\$2M+

Signed:

Date:



THE PROJECT PLANNER

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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THE PROJECT PLANNER

PROJECT NAME:

DUE DATE:

PROBLEM | *What problem are we solving?*

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THE PROJECT PLANNER

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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TRAFFIC LIGHT CHECK-IN



SCAN ME