

120 Day Plan

Lifestyle Tradie Freedom Formula Review

PERSONAL

Name

Company Name



PLATFORM

FUTURE

1. We are clear on our life/personal goals we want for the next 3 years? (separately and/or together) Yes No
2. We are clear on the business goals we want to achieve within the next 3 years? Yes No
3. We have completed & reviewed our business plan in the last 12 months. Yes No
4. We have a clear vision and mission statement for the business. Yes No
5. The team are aware of the vision and mission statement. Yes No
6. We have defined values for the business. Yes No
7. The team are aware and live by the values of the business. Yes No
8. Rate your business between 0 - 10 (0 being poor, 10 being incredible) of how clear you are about what you are trying to achieve within the next 12 months.
 0 1 2 3 4 5 6 7 8 9 10

TECHNOLOGY

1. We have a job management system in our business? Yes No

2. We have implemented the following into our Job Management System;
 - a. Risk Assessments & SWMS uploaded Yes No
 - b. Integrated Cloud Accounting Yes No
 - c. Up-selling technique Yes No
 - d. Stocktake Yes No
 - e. Invoicing on the job Yes No
 - f. Quote follow ups Yes No
 - g. Marketing funnel Yes No
 - h. Automatic job creation Yes No
 - i. P&L capabilities per job Yes No
 - j. Uploading of photos and docs Yes No
 - k. GPS Integration Yes No
 - l. Pre-populated quote and invoice templates Yes No
 - m. Cloud based Yes No
 - n. Importing of supplier invoices that match to existing purchase orders Yes No

3. We have devices for our team in the field to allow them to secure signatures at the start for approval and at the end for agreement of a job done well, plus invoice on site. Yes No

4. We conduct ongoing & consistent training to help our team master & revise processes on the device. Yes No

5. Our accounting program is integrated with our job management system. Yes No

6. **We provide multiple ways for the customer to contact us** (based on what your Avatar wants)?

- a. **Website - Clear and obvious phone number** Yes No
- b. **Website - Booking Form on HOME page** Yes No
- c. **Website – instant messenger (like Tawk.to)** Yes No
- d. **Mobile Friendly website** Yes No
- e. **Floating phone number** Yes No

7. **We use technology to communicate with our team.** Yes No
(e.g.. Voxer for field staff or Asana for admin staff)

8. **We have a very organised, clean and easy soft filing system on the computer and saved safely.** Yes No

9. **We run a daily backup for our data.** Yes No

10. **There is one person responsible for updating and maintaining the company technology to ensure we stay connected and cutting edge.** Yes No

11. **Rate your business between 0 - 10** (0 being poor, 10 being incredible), **of how well you and the team have adopted technology and understand it.**

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SYSTEMS

1. We have flowcharts for the tradesmen to understand the steps they need to follow. Yes No
2. The tradesmen understand their responsibility. Yes No
3. We have flowcharts for the admin team to understand the steps they need to follow. Yes No
4. The admin team understand their responsibility. Yes No
5. We have a common location for the team to access the systems. Yes No
6. The team are held accountable through regular, scheduled meetings and a project management tool (e.g.. Asana). Yes No
7. Ongoing and consistently scheduled training is conducted to ensure the team are following the systems correctly. Yes No
8. There is one person responsible for updating and modifying the systems. Yes No
9. All systems are documented, stored in the cloud for access, everyone is independent and know their roles. Yes No
10. Rate your business between 0 - 10 (0 being poor, 10 being incredible), of how systemised your business is for both you and your team.
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MONEY

FUNDAMENTALS

1. We know our hourly rate and use it across the business. Yes No
2. We understand our business pricing model is right for us and our customers. Yes No
3. We know which of our products/services are most profitable. Yes No
4. Our marketing is aimed at our most profitable work (lead and/or onsite upsell) Yes No
5. We have reviewed our small jobs to ensure there is a profit margin within the past 6 months. Yes No
6. We review & de-brief every large job on completion for best practice, profit margin and team improvement. Yes No
7. We track the number of quotes per week and conversion rates. Yes No
8. We have implemented a Quote Flow System and it is operating automatically within the business. Yes No
9. We negotiate best price on materials. Yes No
10. We review our materials invoicing weekly. Yes No
11. All vehicles have standard stock list. Yes No
12. All materials adjust automatically daily based on increase/decrease. Yes No

13. We collect payment on site on completion of the job. Yes No

14. We always collect deposits at the start of all large jobs. Yes No

15. We always collect part payments throughout the job on large jobs. Yes No

16. We always gain authorisation before we start with a signature. Yes No

17. We always gain signature on completion to confirm satisfaction. Yes No

18. We implement a consistent debt collection process and have it operating within the business. Yes No

19. We always pay invoices when due (not prior). Yes No

20. We have reviewed our expenses within the past 12 months and squeezed what we could. Yes No

21. We have a GREAT bookkeeper that keeps our accounts up to date monthly, provides timely reports, weekly dashboard, understands their responsibility to keep accounts up to date. Yes No

22. We have a GREAT accountant that assists with financial understanding, breakeven, future forecasting, we have regular monthly meetings and provides advice for future planning. Yes No

23. Rate your business between 0 - 10 (0 being poor, 10 being incredible), of how well you understand the financial health of the business and can make quick, informed and confident decisions.

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NUMBERS

1. We have implemented a cloud accounting package. Yes No
2. We update our data every month (reconciliation, quoting etc) ready for a P&L come the 10th of the following month. Yes No
3. We review our P&L, balance sheet monthly. Yes No
4. We review Gross Profit, Dashboard weekly. Yes No
5. We review Breakeven & Forward Forecast quarterly. Yes No
6. We monitor cashflow weekly. Yes No
7. We understand the reports we are reviewing. Yes No
8. We set financial targets (turnover and profit) for each year. Yes No
9. We understand the daily, weekly & monthly targets for the team to achieve the financial year target. Yes No
10. The team understand their daily targets. Yes No
11. We understand the average dollar sale on all our jobs. Yes No
12. We pay ourselves a wage every week including super. Yes No
13. Rate your business between 0 - 10 (0 being poor, 10 being incredible), of how well you understand the NUMBERS within the business.
 0 1 2 3 4 5 6 7 8 9 10

MONITOR

1. We have an advanced financial dashboard and monitor on a weekly basis. Yes No
2. We understand if we have made/lost money on every job immediately on completion. Yes No
3. We review every job on completion to confirm estimated versus real profit or loss. Yes No
4. We conduct a debrief on completion of every major job with your team. (What went wrong/improvements for next time) Yes No
5. The data we are monitoring within our dashboard is 'real time' and current and hence allows us to make confident decisions instead of gut feel. Yes No
6. Rate your business between 0 - 10 (0 being poor, 10 being incredible), of how well you MONITOR the financial data within the business and understand what you are reading.
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MARKETING

CORE

1. We have completed and reviewed a marketing plan within the past 12 months. Yes No
2. We have conducted a Competitor Analysis within the past 12 months. Yes No
3. We have agreed on our marketing objectives for the year and stay focused to achieve them. Yes No
4. The team are aware of our marketing objectives for the year. Yes No
5. We are happy with the market segment/s with whom we currently working with and the percentage of our business these segments represent? (residential, strata, commercial, builders etc). Yes No
6. We are clear about our primary Avatar (target audience) within each market segment? Yes No
7. We have completed The Avatar Advantage Training and unpacked a 'profile' for each Avatar. Yes No
8. We actively market to this avatar? Yes No
9. We have reviewed our ABCD customers within the past 12 months and have either moved up or sacked C & D customers. Yes No
10. We understand the importance, and have included an even split of marketing efforts between attracting new leads, conversion, delivery onsite and generating repeat/referral work. Yes No
11. We have brainstormed a 'wishlist' of marketing ideas for the business to assist meeting the marketing objective within the past 12 months. Yes No
12. We capture all the information we need to constantly build our customer database. Yes No
13. Rate your business between 0 - 10 (0 being poor, 10 being incredible), of how well you understand CORE principles of marketing.

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CAMPAIGNS

1. We are clear on our marketing objectives for the year. Yes No
2. We have implemented a minimum of 10 'attract' strategies, balanced with both online and offline strategies, each with great ROI. Yes No
3. We have implemented a minimum of 10 'deliver' strategies, balanced with both online and offline strategies, each with great ROI. Yes No
4. We have implemented a minimum of 10 'retention' strategies, balanced with both online and offline strategies, each with great ROI. Yes No
5. We make regular offers to our existing database. Yes No
6. We have updated our website and it
 - a. has great brand consistency Yes No
 - b. is targeted to your Avatar Yes No
 - c. is targeted profitable products/service first Yes No
 - d. has Informative content Yes No
 - e. has testimonials Yes No
 - f. has award finalist/win Yes No
 - g. has offers 'lead magnet' for high average \$ sale to capture database/build relationship Yes No
 - h. is mobile friendly Yes No
7. We monitor the ROI of our marketing strategies and are happy with their performance. Yes No
8. We actively try to increase the lifetime value of our customers, and hence their loyalty to our brand. Yes No
9. Rate your business between 0 - 10 (0 being poor, 10 being incredible), of how focused you are with your marketing objectives with strategies & tactics to match, targeted to your avatar.
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CUSTOMER SERVICE

1. We have a strict dress code that is adhered by all daily. Yes No
2. We have a script with 'rules' for every phone call. Yes No
3. We have a documented flow chart/procedure to ensure every customer receives the same experience. Yes No
4. The tradesman understand the importance of these steps/processes and follow them to the letter. Yes No
5. The team understand and apply the steps within The Trust Escalator and are trained accordingly about value not price. Yes No
6. The team use V.A.K. principles when communicating with customers. Yes No
7. The team understands their personality type and have been taught how to read the customers personality Yes No
8. We consistently deliver in a way that exceeds our customers expectations. Yes No
9. We request feedback about our service from the customer, share it with the team, and make positive change accordingly based on their opinion. Yes No
10. We conduct regular and ongoing sales training with the team. Yes No
11. We actively upsell/cross sell onsite. Yes No
12. Rate your business between 0 - 10 (0 being poor, 10 being incredible), of how well your team understand the importance of their role in building trust with the customer.
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13. Rate your business between 0 - 10 (0 being poor, 10 being incredible), of how likely your customer would use you again based on the customer experience they received.
 0 1 2 3 4 5 6 7 8 9 10

PEOPLE

TRANSFORM

1. We are clear about the rockstars we want within the business and only employ the 'right' person with the right attitude. Yes No
2. We have a clear and well communicated onboarding process with new employees. Yes No
3. We have regular toolbox/team meetings (weekly, fortnightly, monthly). Yes No
4. The toolbox meetings are planned in advance and follow a tight agenda. Yes No
5. We host regular team social events throughout the year to encourage the team to get to know each other. Yes No
6. We actively review skillsets and a self-evaluation to understand where to focus skill based training. Yes No
7. We provide ongoing sales training to improve confidence and human social skills. Yes No
8. We provide an incentive program that the team are encouraged to drive. Yes No
9. Consistent training is conducted with thought given to the V.A.K. principles. Yes No
10. Change is never easy, however the team are well aware of our drive for excellence, hence the need to adopt change openly. The team are included in the planning for any change. Yes No
11. We reward and recognise longevity and performance. Yes No
12. Rate your business between 0 - 10 (0 being poor, 10 being incredible), of how well you lead and communicate with your team.
 0 1 2 3 4 5 6 7 8 9 10

LEVERAGE

1. We are happy with the number of hours we work **IN** the business. Yes No
2. We are happy with the number of hours we work **ON** the business (business building). Yes No
3. We have actively completed and/or repeated the **STOP.KEEP.START** exercise within the last year. Yes No
4. We have delegated or outsourced all low value or low enjoyment work. Yes No
5. We focus our time on the top 20% of productive work. Yes No
6. We work to a weekly default diary that delivers maximum productivity (e.g. Monday finances, Tuesday marketing etc). Yes No
7. We always plan the use of our time in advance. Yes No
8. We are investing and growing assets outside the business. Yes No
9. Rate your business between 0 - 10 (0 being poor, 10 being incredible), of how well you leverage time, money and people within the business.
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LEAD

1. I am clear about our personal strengths and weaknesses and stay focused working on our strengths (for all the team). Yes No
2. I am passionate and motivated about driving the business (I am aware my passion reflects on my team) Yes No
3. I have an uncompromising code of values and adhere to principles of utter sincerity and honesty. Yes No
4. I have shared the vision for the future and painted the pathway for the team. Yes No
5. I bring my best to the business every day. Yes No
6. I am aware my mood impacts the team and am conscious to stay positive at all times. Yes No
7. I am consistent with my instruction. Yes No
8. I provide feedback and actively instil confidence with the team to ensure they are constantly growing. Yes No
9. I am decisive and self-disciplined. Yes No
10. I am dedicated to constant self-improvement to continually strengthen and solidify my positive attributes and skills. Yes No
11. There are/is strong leader/s other than me in the business. Yes No
12. I am able to trust my team and allow them responsibility to make decisions (support risk taking). Yes No
13. I am surrounded by a dream team that provide ideas, give valued opinions, provide support and have my back. Yes No
14. Rate your business between 0 - 10 (0 being poor, 10 being incredible), of how well you lead and communicate with your team.
 0 1 2 3 4 5 6 7 8 9 10

SUMMARY

Rate your business **OVERALL** between 0 - 10 (0 being poor, 10 being incredible)

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