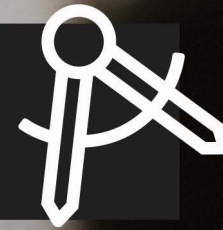


THE ULTIMATE

PROFESSIONAL



PRACTICE CHECKLIST

Your Checklist of Killer Tactics in Financial Admin,
Promotion & Delivery of your Service

The FINANCIALS Checklist incl admin/ support to Measure to Manage to Master

Below are the three projects for "Financials" that will get you on Line 1. Each project has a set of tools and systems that need to be completed.. Have a look at the following checklist and have a think about what is your top priority that would assist your progress to get on Line 1..

Admin/ Delivery fundamentals – *supply/ quality/ easy to buy/ service standards*

- Define/ deliver client service standards
- Deliver service with systematic consistency
- Admin support effectiveness
- Time/ Self Mastery training incl default diary
- Delegated Authority
- Rate Clients: A,B,C,D/ Dump "D" Clients

Financial Reporting +

- Annual Budget & Report monthly progress
- Produce monthly P&L & B/Sheets
- Have Asset Register
- Have a system for Payroll
- Move premises/ reduce management

Up Margins Measure/ Improve

- GP%, NP%, Break Even , GP/hr...
- KPIs/ ratios incl having "dashboard"
- GPM per category
- Pricing review/ survey competition
- Improve Variations system

Tactics

- Targeted price increases
- Identify cost reduction in P&L
- STOP discounting
- Invoice add-ons (misc invoice charge)
- Evaluating tax reduction strategies
- Change Accountant/ review power team

Tame Cashflow Measure/ Improve

- Improve debtors Days
- Improve invoicing speed
- Know Invoicing BOW wave
- Reduce Work in Progress
- Set rule for min Current Ratio
- Set rule for min bank balance

Tactics

- Weekly Cashflow forecast – 3 months out
- Terms of Trade – Lower payment terms
- Assess asset repayments
- Assessing debt servicing levels

Top 3 tools or systems that I need most help with:

1

2

3

The PROMOTE Checklist to Measure to Manage to Master

Below are the three projects for "Promote" that will get you on Line 1. Each project has a set of tools and systems that need to be completed.. Have a look at the following checklist and have a think about what is your top priority that would assist your progress to get on Line 1..

Measure

- Regularly survey clients
- Measure – ALL 5 Ways
- Measure NPS (Net Promoter Score)

Promote basis

- Clarity/ Analysis of Target Market
- Define your Uniqueness
- Create ONE page marketing plan
- Capture Sales FLOW chart
- Document All Marketing & Sales systems
- Focus on serving/ grow relationships
- Refresh Business Profile... tell your story
- Using a prospect nurturing funnel
- Utilise education-based Collateral

Marketing

Boost # Leads (1)

- Developing strategic alliances
- Attending networking functions
- Tender Lists
- Optimizing your website/social pages
- On-line Ad Campaigns incl Lead Magnets
- Using Calls to Action

Boost # Transactions/ Client Focus (3)

- Better service/ your clients feel special
- Keep good Client data/ have Database (CRM)
- Developing proactive referrals
- E - Newsletter
- Calendar or rolling timeline of Comms

Sales

Master Conversion (2)

- Using prospect questionnaires
- Improve Proposal systems incl Benefits
- Utilising follow-up systems
- Capture and use Testimonials
- Training in Sales/ system incl scripts
- Hand deliver/ get prospect into office
- Position agreements upfront
- Educate of full Value, not price

Master Average \$ Sale (4)

- Ensure ALL of your services are known
- Regular contact / 90 days
- Up Appearance – Entry, cars, uniforms

Top 3 tools or systems that I need most help with:

1

2

3

The DELIVERY Checklist incl Team dev. to Measure to Manage to Master

Below are the three projects for "Delivery" that will get you on Line 1. Each project has a set of tools and systems that need to be completed.. Have a look at the following checklist and have a think about what is your top priority that would assist your progress to get on Line 1..

Measure

- 'Productive' & track 'Chargeable' hours
- % Utilization of Delivery Team
- Get agreements around project time
- Separate Performance & Pay reviews
- Quality & professionalism of service
- Team engagement score (bi-annual)

Delivery Mastery

- STOP over servicing
- Ops Manual – doc & chart all processes
- Complete Policy & Procedures manual
- Capture Org. chart – current & future
- Destination – Vision, Goals & Purpose

Systems & Technology

- Start by systemizing the routine tasks
- Start-up templates/ typ. doc examples
- Project Resourcing process incl budgets
- Develop Checklists
- Use standard operating procedures
- Resources/ equipment optimization
- IT/ Technology – upgrade/ maintain
- Record key procedures/ FLOW chart
- Have QC/ QA/ Technical committee
- Automation as much as possible

Develop TEAM

- Hold regular/ effective team meetings
- Team position contacts + "how to" manuals
- Set Practice & Ind. Team Member Goals
- 6 weekly team connections
- Up quality of leadership
- Install a recruitment / induction system
- Complete team skill-based training sessions
- Have an ongoing training program
- Develop 'Rules of the Game/ values'
- Use team behavioural profile analysis
- HR systemized incl Wellness focus
- Develop Team Social Club or sim

Top 3 tools or systems that I need most help with:

1

2

3

Notes:



Short List:

1st Task: