



PLATFORM

**ADVANCE YOUR
TECHNOLOGY**

The Task Timer



The Goal

To implement a Job Management System into your business.

Money Made or Saved

By implementing a job management system into your business, more quotes should be converted on the spot, invoicing can be completed onsite and time saved overall.

#RightNextThing

Set Up Job Management System

The Task

- Do online training on MyLifestyleTradie.
- Research options of Job Management Systems.
- Decide on a job management system to adopt.
- Contact job management system and get set up.
- Begin training on Job Management System.
- Start implementation of Job Management System inline with desired flow of a job (determined in Understand the Sales Conversion Pipeline).
- Once comfortable, go LIVE with job management system with leading hand.
- Review and finetune processes.
- Go LIVE with job management system for rest of team.
- Review and finetune processes.

The Time

- 2 hours
- 5+ hours
- 1 hour
- 2+ hours
- 5+ hours
- 5+ hours
- 2+ hours dependent on number of revisions
- 2+ hours dependent on number of revisions

The Task Timer



The Goal

To implement a Finance Platform into your business.

Money Made or Saved

By implementing a finance platform that fully integrates with your job management system, you will save numerous hours in data entry and if set up the right way, you will have complete clarity over your numbers empowering you to make business decisions.

#RightNextThing

Set Up Finance Platform

The Task

- Do online training on MyLifestyleTradie.
- Research options of Finance Platforms (We recommend you include Xero in your research).
- Decide on a Finance Platform to adopt.
- Contact finance platform and get set up.
- OPTIONAL: Consult a bookkeeper to assist you with the set up of the finance platform.
- Begin training on Finance Platform.
- Once comfortable, go LIVE with finance platform.
- Review and fine tune processes.

The Time

- 2 hours
- 5+ hours
- 1 hour
- 2+ hours
- 3+ hours
- 5+ hours
- 2+ hours dependent on number of revisions

The Task Timer



The Goal

To integrate technology to facilitate connectivity in your trade business.

Money Made or Saved

By integrating technology and creating connectivity, you will build relationships with your customers and your team, benefitting you and the business in the long run.

#RightNextThing

Install Team
Connectivity
& Customer
Connectivity

The Task

The Time

- | | |
|--|------------|
| • Do online training on MyLifestyleTradie. | 2.5 hours |
| • CUSTOMER CONNECTIVITY: List the market segments with whom you work and then list the customers within each market segment. | 1 hour |
| • CUSTOMER CONNECTIVITY: List the current method of communication offered. | 15 minutes |
| • CUSTOMER CONNECTIVITY: List the possible new and improved methods of communication you could offer. | 15 minutes |
| • CUSTOMER CONNECTIVITY: Determine the most urgent new and improved method of communication and action to get it LIVE. | 1+ hours |
| • CUSTOMER CONNECTIVITY: Go LIVE with new method of communication. | |
| • CUSTOMER CONNECTIVITY: Review and fine tune method of communication. | Ongoing |
| • CUSTOMER CONNECTIVITY: Determine the next most urgent new and improved method of communication and action to get it LIVE. | 1+ hours |
| • CUSTOMER CONNECTIVITY: Repeat last 3 steps until all methods of communication are live. | |
| • TEAM CONNECTIVITY: List the current method of communication offered. | 15 minutes |

- TEAM CONNECTIVITY: Decide which communication methods are best for your team.
- TEAM CONNECTIVITY: Determine the most urgent new and improved method of communication and action to get it LIVE.
- TEAM CONNECTIVITY: Go LIVE with new method of communication.
- TEAM CONNECTIVITY: Review and fine tune method of communication.
- TEAM CONNECTIVITY: Repeat last 3 steps until all desired methods of communication are live.

30 minutes

1+ hours

Ongoing

The Task Timer



The Goal

To set up and implement devices in the field.

Money Made or Saved

By implementing payment devices in the field, money can be collected on the spot and less time can be spent chasing money that you may never get. Additionally by providing the team with both smartphones and tablets ensures that they can be self-sufficient in the field, resulting in less double handling and more efficiencies in the business.

#RightNextThing

Set Up Mobile Devices In The Field

The Task

The Time

- | | |
|--|------------|
| • Do online training on MyLifestyleTradie. | 2 hours |
| • PAYMENT COLLECTION: Research options of payment collection devices. | 5+ hours |
| • PAYMENT COLLECTION: Decide on a payment collection device. | 1 hour |
| • PAYMENT COLLECTION: Contact payment collection device company and get set up. | |
| • PAYMENT COLLECTION: Conduct training on payment collection device. | 2 hours |
| • PAYMENT COLLECTION: Go LIVE with payment collection device. | |
| • SMARTPHONES: Research options of smartphones. | 1+ hours |
| • SMARTPHONES: Decide on a smartphone. | 30 minutes |
| • SMARTPHONES: Purchase smartphones. | 1 hour |
| • SMARTPHONES: Set up smartphones as required and ensure that you have complete control over them. | 2+ hours |
| • SMARTPHONES: Provide smartphones to team and go LIVE with them. | |

- TABLETS: Research options of tablets.

1+ hours

- TABLETS: Decide on a tablet.

30 minutes

- TABLETS: Purchase tablets.

1 hour

- TABLETS: Set up tablets as required and ensure that you have complete control over them.

2+ hours

- TABLETS: Provide smartphones to team and go LIVE with them.

The Task Timer



The Goal

To set up vehicle tracking on your vehicles.

Money Made or Saved

By implementing payment devices in the field, money can be collected on the spot and less time can be spent chasing money that you may never get. Additionally by providing the team with both smartphones and tablets ensures that they can be self-sufficient in the field, resulting in less double handling and more efficiencies in the business.

#RightNextThing

Set Up Vehicle Tracking

The Task

- Do online training on MyLifestyleTradie.
- Research options for vehicle tracking.
- Decide on the vehicle tracking option you want to proceed with.
- Contact the vehicle tracking company and get set up.
- Arrange for the vehicles to have the trackers installed.
- Have the vehicle trackers installed.
- Go LIVE with vehicle tracking.
- Conduct training on vehicle tracking software and reporting.

The Time

- 30 minutes
- 3+ hours
- 1 hour
- 30 minutes
- 1+ hours
- 2+ hours

The Task Timer



The Goal

To set up your email professionally so that you are leaving a professional impact with those you are communicating with.

Money Made or Saved

By having a professional email set up with the correct email etiquette you will build long lasting relationships with customers, suppliers and others who you are communicating with. Your business will be taken more seriously by those who are perceiving it.

#RightNextThing

Set Up Professional Communication

The Task

- Do online training on MyLifestyleTradie.
- EMAIL SET UP: Research Email providers. (We recommend including Google Workspace and Microsoft365 in your research)
- EMAIL SET UP: Decide on an email provider.
- EMAIL SET UP OPTIONAL: Consult an IT specialist to assist you with the set up of your domain & email hosting.
- EMAIL SET UP: Decide on what email addresses you want set up.
- EMAIL SET UP: Create your email addresses.
- EMAIL SET UP: Add email to apps so you can view and respond to emails (eg. Outlook, Mail app, Gmail app etc).
- EMAIL SET UP: Provide training to staff in regards to new email accounts.
- EMAIL SIGNATURE: Decide on the information to include in your email signature.
- EMAIL SIGNATURE: Source a graphic designer or alternatively design your email signature yourself. (HINT- Try Canva)

The Time

1 hour

2+ hours

1 hour

1 hour

30 minutes

1+ hours

1 hour

1 hour

1+ hours

-
- EMAIL SIGNATURE: Review designs and decide on final design.

1 hour

-
- EMAIL SIGNATURE: Finalise design & duplicate for different email addresses/employees etc.

1 hour

-
- EMAIL SIGNATURE: Add your email signature into your chosen email app so it will default to the bottom of all emails.
-

30 minutes

The Task Timer



The Goal

To ensure your business is protected against cyber crime.

Money Made or Saved

By ensuring your business is properly protected from cyber crime, you are safeguarding your future and keeping yours, your customers and your suppliers data safe.

#RightNextThing

Guard Against Cyber Crime

The Task

- Do online training on MyLifestyleTradie.
- Review the current cybersecurity within your business and brainstorm all the possible risks to your business.
- Identify the most urgent risk outlined on your list and work on a plan to minimise this risk from happening.
- Action your plan for the first risk.
- Identify the next most urgent risk outlined on your list and work on a plan to minimise this risk from happening.
- Action your plan for this next most urgent risk.
- Repeat last 2 steps until all risks on the list have been actioned.

The Time

2 hours

2+ hours

2+ hours

1+ hours

2+ hours

1+ hours

The Task Timer



The Goal

To optimise your job management system to enhance customer experience and efficiency.

Money Made or Saved

By optimising your job management system money will be saved by streamlining processes, removing double handling and squeezing efficiencies.

#RightNextThing

Optimise Job Management System

The Task

- Do online training on MyLifestyleTradie.
- Review how you are using your job management system.
- Decide new/additional features to implement into your job management system.
- Action the first new/additional feature to implement.
- Go live with the first new single change.
- Review and fine tune process.
- Action the next new/additional feature to implement.
- Go live with the next new single change.
- Review and fine tune process.
- Repeat last 3 steps until desired flow is achieved.

The Time

- 1 hour
- 2 hours
- 1 hour
- 2+ hours
- Ongoing
- 2+ hours
- Ongoing

The Task Timer



The Goal

To convert to a paper-light office and minimise the use of paper in your workplace.

Money Made or Saved

By converting to a paper-light office, you will increase efficiency and security whilst reducing costs, along with improving the customer experience.

#RightNextThing

Convert To A Paperless Office

The Task

- Do online training on MyLifestyleTradie.
- Define your vision and end goal for your paper-light business.
- Identify digitisation opportunities for each stage in the flow-of-a-job.
- Update the first digitisation opportunity with new/desired changes.
- Go live with the first new single change.
- Review and fine tune process.
- Once perfected, update the next digitisation opportunity with new/desired changes.
- Go live with the next new single change.
- Review and fine tune process.
- Repeat last 3 steps until desired digitisation is achieved.
- Design a document management system.
- Implement the agreed upon document management system.
- Once complete measure the impact of going paper-light.

The Time

- 1 hour
- 30 minutes
- 2+ hours
- 2+ hours
- Ongoing
- 2+ hours
- Ongoing
- 3+ hours
- 3+ hours
- 2 hours