



PROFIT

MONITOR YOUR METRICS

The Task Timer



The Goal

To understand the conversion of quotes, quotes in the pipeline and the volume of quotes (won, lost new & pending).

Money Made or Saved

By understanding exactly the pipeline of quotes and potential work moving forward.

#RightNextThing

Master The Quote Tracker

The Task

- Do online training on MyLifestyleTradie.
- Download the Quote Tracker.
- Ensure quotes in Job Management System are up to date.
- Complete The Quote Tracker.
- Review current quote conversion.
- Complete The Quote Tracker weekly.

The Time

- 1 hour
- 5 minutes
- 30 minutes
- 30 minutes
- 30 minutes
- Ongoing

The Task Timer



The Goal

To implement a dashboard of metrics into the business that is reviewed regularly.

Money Made or Saved

By implementing a dashboard in the business, certain metrics will be monitored frequently allowing timely and effective correction or intervention where necessary.

#RightNextThing

Set Up Dashboard & Reporting Rhythm

The Task

- Do online training on MyLifestyleTradie.
- Download the Data Dashboard.
- Ensure job management system is complete and up to date.
- Ensure finance platform is complete and up to date.
- Complete The Quote Tracker
- Complete The Basic Dashboard Sections b and c ONLY.
- Complete The Basic Marketing Dashboard Section e ONLY.
- Review data.
- Complete The Quote Tracker, The Basic Dashboard and Basic Marketing Dashboard Weekly.
- NOTE: The first time you complete this dashboard will take the longest. Once you set up the reports and the spreadsheet, moving forward this will not take as long.

The Time

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

The Task Timer



The Goal

To extend the the level of reporting on metrics in the business that is reviewed regularly.

Money Made or Saved

By extending the metrics being reported on in the dashboard the business can monitor certain metrics at a job level frequently allowing timely and effective correction or intervention where necessary.

#RightNextThing

Set Up & Review Job Completion Metrics

The Task

- Do online training on MyLifestyleTradie.
- Ensure job management system is complete and up to date.
- Ensure finance platform is complete and up to date.
- Update The Basic Dashboard Section d with tradespersons names.
- Complete The Basic Dashboard Section d.
- Download The Job Completion Checklist.
- Review and update the The Job Completion Checklist to suit your business.
- Educate the dispatch staff about the The Job Completion Checklist.
- Update The Basic Marketing Dashboard Section f, g, and h with correct segment names, campaign names and zone names respectively.
- Complete The Basic Marketing Dashboard Section f, g, and h.
- Download the Performance Checklist.

The Time

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

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- Review and update the The Performance Checklist to suit your business.
-

1 hour

- Educate the dispatch staff about the The Performance Checklist.
-

1 hour

- GO Live with Job Competition Checklist and The Performance Checklist.
-

- Complete The Quote Tracker, The Basic Dashboard and Basic Marketing Dashboard and performance Checklist Weekly.
-

Ongoing

- Review data.
-

1 hour

The Task Timer



The Goal

#RightNextThing

Money Made or Saved

Track & Analyse Gross Profit Margin

The Task

The Time

- Content coming soon



The Task Timer



The Goal

To track The 7 Dials™ Data in your business.

Money Made or Saved

By tracking and analysing the data in the 7 Dials spreadsheet you will be able to realistically see how well your business is performing each of The 7 Dials processes, resulting in identification of the areas in your business that need improvement and hence will impact on your profit.

#RightNextThing

Track & Analyse The 7 Dials To Drive Profit

The Task

- Do online training on MyLifestyleTradie.
- Review your 7 Dials spreadsheet data.
- Identify areas of your 7 Dials that need improvement.
- Download The 7 Dials™ Strategies Handout.
- Identify which strategies to implement into your business.
- Select the first strategy and review how it will work in your business and execute.
- Go LIVE with the strategy.
- Review and fine tune process.
- Select the next strategy and review how it will work in your business and execute.
- Repeat the last 3 steps until all selected strategies have been reviewed and implemented in your business.
- Review your 7 Dials spreadsheet data at your selected intervals of reporting (eg. weekly, monthly).

The Time

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

The Task Timer



The Goal

Money Made or Saved

#RightNextThing

Track & Analyse
Advanced Marketing
Metrics

The Task

- Content coming soon

The Time



The Task Timer



The Goal

#RightNextThing

Money Made or Saved

Manage Team
KPI Metrics

The Task

The Time

- Content coming soon



The Task Timer



The Goal

#RightNextThing

Money Made or Saved

Set & Review
Advanced
Dashboard

The Task

The Time

- Content coming soon



The Task Timer



The Goal

To track performance and address any gaps.

Money Made or Saved

By identifying performance gaps in the business you can drive your business performance more proactively and with more clarity.

#RightNextThing

Manage Business Performance vs Targets

The Task

- Do online training on MyLifestyleTradie.
- If you haven't already in other modules, set targets for areas of your trade business.
- Select the first target and breakdown the progress over the agreed upon timeframe.
- Monitor your targets progress against the tracking of performance over their timeframe for accomplishment.

The Time

2 hours

2 hours

1 hour

Ongoing