THE LIFESTYLE TRADIE ONBOARDING & TRAINING GUIDE



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How to Use & Roll Out Your Onboarding & Training Guide

INTRODUCTION: Welcome to the Lifestyle Tradie Onboarding & Training Guide

Congratulations on taking the time to build a structured onboarding and training experience for your team.

The first day of employment is one of the most important days in a team member's journey. It sets expectations, introduces standards and helps new employees understand how your business operates. Done properly, onboarding creates clarity, confidence and consistency from the very beginning.

This Onboarding & Training Guide has been designed to help you communicate the key information every new team member needs to know about your business, including your culture, expectations, systems, processes, customer service standards, safety requirements and ways of working.

It is important to understand that this guide is designed to support training, not replace it.

Reading information is only one part of learning a role. New team members will still require practical, hands-on training within your business. They should be shown how to perform their role using your specific systems, processes, flow charts, checklists, templates, software platforms, tools and equipment.

Think of this guide as the foundation.

It provides the "why" behind how your business operates, while on-the-job training provides the "how".

Together, they create a structured onboarding experience that helps employees become productive, aligned and confident much faster than relying on verbal instruction alone.

Before assigning this guide to a new employee, take the time to customise each section so it accurately reflects your business, your team and your expectations. The more relevant and specific the content is, the more valuable it will be for future team members.

Remember, onboarding is not just about teaching someone how to do a job.

It's about helping them understand what good looks like, how your business operates and what it means to be part of your team.

The effort you put into onboarding today will pay dividends through better performance, improved consistency, stronger culture and a better experience for both your team and your customers.

About This Onboarding & Training Guide

This guide exists to help you create a consistent onboarding experience for every new team member who joins your business.

The Lifestyle Tradie Onboarding & Training Guide is designed to become the foundation of your employee onboarding process. Once customised, it can be provided to all new employees as part of their first day and first few weeks in the business.

Before using this guide with your team, take the time to review and update each section so it accurately reflects your business, your systems, your standards and your expectations.

Any instructional pages, examples, sample wording or implementation notes included throughout the guide should be removed once you have finished customising the document.

The final version should contain only the information relevant to your business and team.

Why This Matters

Without a structured onboarding process, training often becomes dependent on who is delivering it and what information they happen to remember at the time.

This can lead to:

- Confusion for new team members
- Different standards being taught by different people
- Important information being missed
- Longer onboarding and training periods
- Increased pressure on business owners and managers

A well-structured onboarding guide helps create consistency from day one.

It ensures every team member receives the same information, understands the same expectations and is introduced to the business in a professional and organised way.

What This Guide Does

This guide helps new employees understand:

- Who you are as a business
- How the business operates
- Your standards and expectations
- Customer service requirements
- Safety responsibilities
- Communication expectations
- Systems and processes used within the business
- How their role contributes to the bigger picture

What This Guide Does NOT Do

This guide is designed to support onboarding and training, not replace it.

Employees will still require practical, hands-on training specific to their role.

They should continue to receive training on:

- Flow charts and procedures
- Checklists and templates
- Software systems
- Equipment and tools
- Site-based processes
- Role-specific responsibilities
- Technical trade skills

Think of this guide as the foundation that helps team members understand how your business works, while on-the-job training teaches them how to perform their role successfully.

When used together, they create a structured onboarding process that builds confidence, improves consistency and helps new team members become productive much faster.

The goal is simple:

Create a business where every new employee receives the same high-quality onboarding experience, regardless of who is delivering the training.

Customising Your Onboarding & Training Guide

This guide has been designed to give you a strong starting point for building a professional onboarding experience for your team.

The structure, topics and examples have already been created for you. Your role is to customise the guide so it accurately reflects how your business operates.

Before providing this guide to a new employee, work through each page and make sure the information is relevant to your business, your systems, your standards and your team.

How To Use This Guide

Throughout the document, you will find:

- Instructions explaining the purpose of each page
- Guidance on what information should be included
- Sample wording and examples

These examples are not intended to be used word-for-word.

Instead, they should be treated as a starting point that you customise to suit your business.

As you work through the guide:

1. Read the instruction section at the top of each page
2. Review the sample wording provided
3. Replace the examples with information specific to your business
4. Remove anything that does not apply
5. Add anything important that is missing

The goal is to create a guide that feels like it was written specifically for your business, not a generic template.

Review Your Systems & Processes

As you customise the guide, ensure all systems, processes and tools referenced are accurate.

This may include:

- Job management software
- Scheduling and dispatch procedures
- Quoting and invoicing processes
- Communication platforms
- File storage systems
- Customer service procedures
- Safety processes and requirements

If your business uses different systems, update the guide accordingly.

Remove Anything You Don't Use

Not every business operates the same way.

If there are references to systems, processes, roles or procedures that do not apply to your business, remove them.

A good onboarding guide should create clarity, not confusion.

New team members should only be learning information that is relevant to how your business actually operates.

Add Business-Specific Information

While this guide covers the most common onboarding topics, every business has unique processes, expectations and ways of working.

Take the opportunity to add:

- Business-specific procedures
- Internal standards
- Customer service expectations
- Communication rules
- Operational requirements
- Role-specific information
- Safety requirements
- Any other information that would help a new team member succeed

If it's important to the way your business operates, it belongs in your onboarding guide.

Review Videos & Supporting Resources

If you choose to include videos, documents, flowcharts, checklists, templates or supporting resources, make sure they reflect your business.

The most effective onboarding materials are usually:

- Real job walkthroughs
- System demonstrations using your software
- Team-recorded training videos
- Actual business processes and examples

The more relevant the content is, the more valuable it becomes for new employees.

The Final Test

Before issuing the guide to a new team member, ask yourself:

"If a new employee read this guide from start to finish, would they gain an accurate understanding of how our business operates?"

If the answer is yes, you're ready to use it.

If the answer is no, continue refining it until the guide reflects reality, not theory.

The businesses that get the most value from onboarding are the ones that take the time to make it their own.

Maintaining Your Onboarding & Training Guide

Your onboarding and training guide is not something you write once and forget.

It is a live document that should always reflect how your business actually operates right now.

If it is out of date, it stops being useful. If it is accurate, it becomes one of the most powerful tools in your business.

This guide replaces informal training, verbal handovers and "this is how we usually do it" explanations, so it must stay current.

Step 1: Review Existing Content

Before making any changes, take time to regularly review the onboarding guide from start to finish.

Check that everything still aligns with how the business operates today.

Confirm:

- The content is still accurate
- The workflows match current operations
- Nothing is outdated, missing or duplicated
- The structure still reflects how the business actually runs

If something feels unclear or no longer relevant, it needs to be addressed immediately.

Step 2: Update Immediately When Things Change

Whenever the business changes, the onboarding guide must change with it.

Do not wait for a "future update" or a scheduled review.

If something changes in the business, update onboarding straight away.

This includes:

- Process changes
- System updates
- Software or tool changes
- Workflow adjustments
- Communication changes
- Safety or compliance updates

If it affects how the team works, it belongs in onboarding.

Step 3: Remove Outdated Content

If something is no longer part of the business, it should not stay in the guide.

Outdated information creates confusion, inconsistency and poor training outcomes.

When something changes:

- Remove it completely
- Replace it with the new process
- Or clearly update it so it reflects current operations

If there is any doubt, assume it should be updated.

Step 4: Keep It Practical and Based on Real Work

This guide must always reflect reality, not theory.

Everything in onboarding should match what actually happens in the business, including:

- How jobs are completed
- How communication happens between office and field
- How systems are used day to day
- How decisions are made on site and in the office

If it doesn't match real operations, it is incorrect and should be changed.

The Standard

A good onboarding guide is not the most detailed document.

It is the most accurate one.

The value comes from it reflecting the real business, not an ideal version of it.

If it stays current, it becomes a reliable foundation for training every new team member consistently and confidently.

The Rollout Process: Using This Onboarding & Training Guide with New Staff

This guide is used as the structured onboarding system for all new team members in the business.

It ensures every employee is trained in a consistent way, using the same information, expectations and standards, regardless of who is doing the training.

Onboarding is not informal or ad hoc. It follows a clear process so new team members understand the business properly from day one.

Step 1: Provide Access to the Onboarding & Training Guide

New team members are given access to the Lifestyle Tradie Onboarding & Training Guide as part of their first day.

They are clearly informed that this document is the official onboarding system for the business.

It sets expectations, explains how the business operates and forms the foundation of their training.

Step 2: Follow the Guide in Order

The onboarding guide must be completed in sequence.

Each section builds on the previous one, so skipping ahead can lead to gaps in understanding.

New team members are expected to work through the guide step by step, as part of their structured onboarding process.

Step 3: Combine Learning with Real Work

Onboarding is not just reading, it must be applied in real situations on the job.

Training should happen alongside live work so learning is reinforced through practical experience.

As a guide, the balance should be:

- 30–40% learning through the onboarding guide
- 60–70% learning through hands-on, on-the-job application

New team members should be encouraged to apply what they learn immediately, rather than waiting until they have completed the entire guide.

Step 4: Use the Guide as the Reference Point

During onboarding, this guide becomes the first point of reference for all questions about:

- How processes work
- What the expectations are
- How the business operates
- What “good” looks like in practice

If a question comes up, the answer should first be checked against the guide before being explained verbally.

This ensures consistency in training and reduces confusion caused by different interpretations.

Step 5: Improve the Guide After Each New Team Member

The onboarding guide should continuously improve over time.

After onboarding each new team member, take time to review:

- Where they were confused
- What was unclear or missing
- Which sections needed more detail
- What questions were repeatedly asked

Then update the guide accordingly.

This ensures onboarding becomes clearer, more effective and easier to deliver with each new hire.

This onboarding guide is not optional.

It is the foundation of how new team members are introduced to the business.

Moving Into the Guide

The following sections form the Lifestyle Tradie Onboarding & Training Guide.

This is where we move from understanding how onboarding works, into the actual standards, expectations, systems and ways of working inside the business.

Work through each section in order and use it as your reference for how things are done here day to day.

When you're ready, start with the first section.

SECTION 1 – Welcome To ABC Trade Business

1.1 A Message From The Founders

INSTRUCTION:

Use this page to create a warm, genuine welcome message for new team members joining your business. This is your first opportunity to set the tone for their experience and make them feel like they are part of something meaningful from day one.

Your message should:

- Show genuine excitement that they've joined the team
- Make it clear they are valued, not just "another hire"
- Briefly connect their role to the bigger picture of the business
- Give a sense of what life and opportunity looks like inside your business
- Reassure them that they're supported while they learn and grow

This can be written as a short message or delivered as a simple video from leadership (video is encouraged if you want it to feel more personal and real).

The tone should feel human, grounded and proud, not corporate.

In later pages, you will go deeper into:

- Our Story & Growth (Story & milestones)
- Our Mission Statement, Vision & Values

EXAMPLE:

Welcome to ABC Trade Business 👋

We're genuinely glad you're here.

When someone joins this team, it's not just about filling a role. It's about adding another person who contributes to how we show up every day for our customers, our team and the standard we're building as a business.

What we do is simple, but it matters.

We turn up when we say we will. We do quality work. We communicate clearly. And we take pride in leaving every job better than we found it.

Your role plays directly into that, no matter where you sit in the business. Whether you're on the tools, learning the trade or supporting from the office, your work helps shape the experience customers have with us and the reputation we build together.

Inside this business, you'll find a mix of structure and opportunity. Structure so you always know what's expected. Opportunity so you can grow, develop your skills and take on more over time if you want it.

We don't expect you to know everything from day one. What matters most is how you show up. Your attitude, your willingness to learn and how you communicate with the people around you.

If you bring that, you'll be supported here.

And if you stick with it, you'll find there's real opportunity ahead, not just in work, but in growth, confidence and direction.

Welcome to the team.

Andy & Angela Smith

1.2 What You're Stepping Into

INSTRUCTION:

Use this page to clearly explain what a new team member is stepping into when they join your business.

This is about setting expectations early so people understand the environment, the standards and the way things operate day to day.

Your message should:

- Give a realistic picture of how the business operates (not overly polished or idealised)
- Explain the importance of structure, communication and standards
- Set expectations around how work is planned, delivered and reviewed
- Reinforce that everyone plays a role in the success of the business
- Highlight that support is available, but accountability is expected
- Give a sense of pace, professionalism and teamwork

This section should help new staff understand:
"This is how we do things here and this is what it means for you."

Keep the tone clear, grounded and straightforward. Avoid corporate language or overcomplication.

EXAMPLE:

Joining this business means stepping into a workplace that is structured, fast-moving and built around doing real work properly. Not just getting through the day.

We don't operate on guesswork or last-minute chaos. Jobs are planned, communicated and scheduled with intention. That means you'll always be expected to know where you're going, what you're doing and how your part fits into the bigger picture.

From day one, you'll notice a few key things:

There are clear expectations here.
We don't assume people will "just pick it up" without support, but we do expect you to engage, ask questions and take responsibility for your learning.

Communication matters.
If something changes, we talk about it. If something is unclear, we ask. If there's an issue, it gets raised early, not left until it becomes a bigger problem.

Standards are non-negotiable.
The way we present ourselves, the way we complete work and the way we treat customers all reflect the business as a whole. Every job counts, regardless of size.

Everyone has a role in how things run.
Whether you're on the tools or in the office, your work directly affects the customer experience and the team around you. There is no "small role" here. Everything connects.

You'll also find that support is available, especially while you're learning. No one is expected to be perfect. But there is an expectation that you show effort, improvement and consistency over time.

This is a workplace where things move, standards matter and people rely on each other.

If you lean into that, communicate well, stay switched on and take ownership of your role, you'll settle in quickly and do well here.

1.3 What Success Looks Like Here

INSTRUCTION:

Use this page to clearly define what "good" looks like inside your business. This helps new team members understand what success actually means day-to-day, beyond just turning up and completing tasks.

Your message should:

- Explain the behaviours and attitudes that define strong performance
- Focus on how work is done, not just what is done

- Reinforce accountability, ownership and communication
- Highlight consistency, reliability and pride in work
- Encourage growth, learning and improvement over time
- Make it clear that success is achievable when standards are followed

This is not about pressure or perfection. It's about clarity, so people know what they're aiming for and how to thrive in the business.

Keep the tone supportive, practical and straightforward.

EXAMPLE:

Success in this business isn't about being perfect. It's about how you show up, how you work and how consistently you meet the standards expected of the team.

At its core, success here looks like this:

You take ownership of your work.
You don't wait to be chased, told twice or reminded constantly. You think ahead, you follow through and you treat your responsibilities like they matter, because they do.

You communicate clearly and early.
If something changes, you speak up. If you're unsure, you ask. If there's a problem, it's raised before it becomes someone else's problem. Good communication keeps everything moving.

You do the job properly the first time.
There's a focus here on quality, not shortcuts. Whether it's a small task or a full installation, the expectation is the same, work you can stand behind.

You show up consistently.
Being reliable is a big part of being successful here. Turning up on time, ready to work and prepared for the day builds trust with the team and customers.

You respect the people and the process.
How you speak, how you behave and how you interact with customers and teammates matters just as much as the technical work.

You keep improving.
No one is expected to know everything straight away. But people who do well here are the ones who listen, learn, take feedback seriously and apply it.

Success here isn't about doing one big thing right.
It's about doing the simple things well, every day, without needing to be chased.

If you can do that, you won't just fit in here. You'll stand out for the right reasons.

1.4 Your First 30 Days Plan

INSTRUCTION:

Use this page to clearly outline what a new team member can expect during their first 30 days in the business.

This section should remove uncertainty and help them understand that their first month is about learning, settling in and building confidence. Not perfection.

Your message should:

- Break the first 30 days into simple, easy-to-understand phases
- Set expectations around learning, support and gradual responsibility
- Make it clear that no one is expected to know everything immediately
- Emphasise asking questions, engaging with training and learning systems
- Show progression from observation → participation → independence
- Reinforce that feedback is part of the process and expected

Keep it structured, encouraging and practical. Avoid pressure-based language.

EXAMPLE:

Your first 30 days are about getting comfortable, learning how things work and building confidence in your role. You won't be expected to know everything from day one. This is a period focused on learning our systems, understanding our standards and getting a feel for how we operate as a team.

It's designed to help you settle in properly and build a strong foundation before higher expectations come into play. There's no rush. The focus is on setting you up the right way so you can grow into the role with confidence.

Week 1: Settling In

Focus: "How do things work here?"

This first week is about orientation, observation and understanding the environment you've joined.

During this week you will:

- Meet the team properly and start learning who does what across the business
- Get introduced to how we operate day-to-day (how jobs are booked, planned and delivered)

- Be set up on all systems, tools, logins and communication platforms you'll need
- Learn the basic structure of how work flows from office → field → completion
- Understand expectations around communication, punctuality and professionalism
- Spend time shadowing experienced team members to see real work in action

This week is intentionally hands-on-light. The goal is not to perform. It's to absorb.

You'll likely have lots of questions and that's exactly what we expect. Nothing is too small or too basic to ask.

Week 2 — Getting Involved

Focus: "How do I contribute properly?"

This is where you start stepping into the work and contributing in a more active way, while still being supported.

During this week you will:

- Start assisting on live jobs or tasks relevant to your role (with guidance)
- Learn how customer communication is handled before, during and after jobs
- Begin using systems yourself instead of just observing them
- Get a clearer understanding of job expectations and how quality is measured
- Start taking ownership of smaller tasks within jobs or workflows
- Work closely with team members while learning how decisions are made on-site or in the office

This week is about participation and repetition. Seeing how things are done, then starting to do them yourself with support nearby.

Mistakes are part of this stage. The important part is asking, learning and adjusting quickly.

Week 3 — Building Confidence

Focus: "How do I do this well?"

By this stage, you should be starting to feel more comfortable with the flow of work and expectations.

During this week you will:

- Take on more responsibility within your role without needing step-by-step instruction
- Complete parts of jobs or tasks with supervision rather than full guidance
- Start working more independently, while still having support available when needed
- Begin to understand priorities and how to manage your workload throughout the day
- Receive more direct feedback on performance and start applying it immediately
- Build consistency in how you approach work, communication and task completion

This is where things start to click. You're no longer just observing. You're contributing in a meaningful way.

The focus here is consistency and improvement, not speed.

Week 4 — Finding Your Rhythm

Focus: "How do I perform consistently?"

This final week is about stabilising your routine and stepping into your role with more independence.

During this week you will:

- Work more independently within your role and daily responsibilities
- Understand expectations without needing constant direction
- Demonstrate consistency in communication, work quality and reliability
- Manage your tasks with less supervision while still checking in when needed
- Show that you can follow systems and processes without reminders
- Sit down for your first structured check-in review with leadership

This week is about showing that you can apply what you've learned consistently, not just occasionally.

At The End Of 30 Days

By the end of your first 30 days, you should feel:

- Comfortable using the systems and understanding how the business runs
- Clear on what is expected of you in your role
- More confident in your day-to-day work
- Supported, but starting to take real ownership
- Clear on your direction moving forward

We don't expect perfection in your first month.

We do expect progress, effort and willingness to learn.

If you bring that, you'll settle in well and you'll be set up for long-term success here.

SECTION 2 – Who We Are & How We Operate

2.1 Our Story & Growth

INSTRUCTION:

Use this page to tell the story of how your business started and how it has grown into what it is today.

This is not a corporate history. It should feel real, honest and grounded in lived experience.

Your message should:

- Explain how the business started (the early days, challenges and turning point)
- Show the journey of growth, including setbacks and key moments of change
- Highlight the shift from "just getting by" to building something more structured and intentional
- Reinforce resilience, learning and adapting over time
- Make it clear that the business has been built through real trade experience, not theory
- Help new team members understand the standards and mindset that shaped the business

The tone should be authentic, straightforward and human, like a story being told, not a corporate timeline.

EXAMPLE:

ABC Trade Business started trading in 2000 with a simple setup: one qualified tradesperson, one work vehicle and a focus on getting quality work done for local customers.

At the time, there were no systems, no office team and no formal structure. The business was run day-to-day on experience, reputation and sheer effort. The priority was straightforward: turn up, do the job properly and keep customers happy.

In 2002, the first employee was brought on. This marked the beginning of the business moving from a sole operator model into a small team environment. Work increased steadily and word-of-mouth referrals continued to drive growth.

By 2008, ABC Trade Business had expanded to a team of 17 people, including trades, apprentices and office support.

On paper, the business was growing. In reality, it was becoming harder to manage.

Overheads were high. Job coordination was inconsistent. Different market segments were pulling the business in competing directions, particularly a heavy focus on real estate and strata work. While volume was strong, margins were inconsistent and the workload was often reactive rather than controlled.

The business was busy, but not necessarily sustainable.

By 2010, a full restructure was required.

A decision was made to reset the direction of the business.

The focus shifted away from primarily real estate and strata work and moved toward residential service and maintenance work, where quality, customer relationships and repeat business could be better controlled and valued.

At the same time, pricing structure was completely redesigned. The business moved away from a "do and charge" model and introduced flat rate pricing. This created greater transparency for customers, improved quoting consistency and allowed for more predictable revenue.

Operationally, the team size was reduced from 17 down to 8.

While this was a difficult decision at the time, it created immediate improvements. The business became more efficient, communication improved, scheduling became easier to manage and profitability increased significantly. Just as importantly, stress levels and operational friction decreased across the board.

From 2010 onwards, the business entered a more stable and controlled growth phase.

With a smaller, more aligned team and clearer focus, ABC Trade Business was able to refine its systems, improve customer experience and build a more sustainable model that supported both the business and its people.

Over time, processes were documented, standards were introduced and training became more structured. What was once a reactive, high-pressure operation began to evolve into a planned and repeatable system.

Today, ABC Trade Business is the result of that journey.

A business that has experienced rapid growth, structural challenges, difficult decisions and a full operational reset. Those experiences have shaped how the business operates today.

We still carry the same core values from the beginning: turn up on time, do quality work and look after customers properly.

But now those values are supported by structure, systems and clear expectations that allow the business to deliver consistently, regardless of who is on the job.

The onboarding and training system you are stepping into exists because of that history.

It is built from real experience, real lessons and real decisions made in the field.

Welcome to ABC Trade Business.

2.2 Our Standards

INSTRUCTION:

Use this page to clearly define the standards, behaviours and expectations that guide how people work inside your business.

This is not just a list of rules. It's a reflection of the mindset and culture that makes the business what it is.

Your message should:

- Clearly explain how we expect people to think, act and show up every day
- Blend mindset, behaviour, communication and workmanship standards
- Reinforce accountability, ownership and proactive thinking
- Highlight that mistakes are part of learning when people are pushing and improving
- Set expectations around professionalism with customers, tools and teammates
- Keep the tone human, direct and practical. Not corporate or overly polished

These standards should feel like "this is how we do things here" rather than "you must comply with rules."

EXAMPLE:

Our Standards

Our standards are simple but they matter in everything we do.

They guide how we think, how we work, how we communicate and how we show up every day. They exist to keep quality high, the team aligned and the business moving in the right direction.

At ABC Trade Business, we use common sense, take ownership and back ourselves to do the job properly. If something doesn't feel right, we don't ignore it. We deal with it.

Here's what that looks like in practice:

Mindset & Behaviour

Use your best judgement
If you've been put in a situation, we trust you to think it through and make the right call.

Be proactive
Don't wait to be told every step. Look ahead, take initiative and get involved.

Make mistakes (and learn from them)
Mistakes aren't something we punish. They're part of learning. If you're making mistakes, it usually means you're trying, improving and being proactive. That's a good thing when you own it and learn from it.

Take ownership
Own your results. Excuses like "I thought someone else was doing it" don't fly here.

Bring your best self
Show up every day ready to contribute. Energy, attitude and effort matter just as much as skill.

Work it out
If you don't know the answer, find it. Ask. Research. Figure it out. Bring solutions, not just problems.

Collaborate
Support your teammates. You don't need to overcomplicate it. Just be helpful and work together.

Use your voice
If something isn't right, speak up. Don't sit on it, don't let it build. Have the conversation.

Find a better way
Ask yourself regularly, "Is there a better way to do this?" If there is, improve it. Systems, trucks, processes, communication. Everything can evolve.

Always respond with kindness
How you respond to people matters. Stay respectful, even when things are stressful or difficult.

Workmanship & Responsibility

How we treat our belongings
We treat tools, tech, vehicles and equipment with care and respect. Everything stays clean, organised and looked after.

How we speak to customers
We don't overcomplicate things or hide behind jargon. We explain things simply, clearly and honestly so customers understand exactly what's going on.

How we treat the team
We are respectful, helpful and professional with each other at all times. Always use "please" and "thank you", whether spoken or written. Different people have different communication styles, but kindness and respect are non-negotiable.

At ABC Trade Business, how we treat people matters just as much as how we do the work.

2.3 Our Mission Statement, Vision & Values

INSTRUCTION:

Use this page to clearly define the purpose, direction and values of your business.

This section explains why your business exists, what you're working toward and how the team is expected to show up every day.

Your message should:

- Clearly define the mission (why the business exists day-to-day)
- Clearly define the vision (what success looks like long-term)
- Outline core values that guide behaviour and decision-making
- Translate values into real workplace behaviours (not just slogans)
- Reinforce accountability, professionalism, teamwork and service mindset
- Keep tone simple, direct and meaningful. Not corporate or overly polished

This should feel like the foundation of how the business operates and what it stands for.

EXAMPLE:

Mission Statement

Helping Aussie families maintain their homes hassle-free, so they can get on with living, not worrying about plumbing problems.

We exist to make trade work simple, reliable and done properly the first time.

Vision

Happy Families, Happy Homes.

We are committed to becoming a trusted leader in the maintenance trade industry, known for quality work, reliable service and a team that takes pride in what they do.

We aim to build something that lasts, where customers trust us and the team is proud to be part of it.

Values

Excellence

We are committed to going the extra mile to exceed expectations, not just for customers, but for ourselves, our suppliers and our industry.

We challenge ourselves to execute properly, present ourselves professionally and consistently deliver high-quality work.

We don't aim for average. We aim for work we can stand behind.

Excellence isn't something we do once. It's how we operate every day.

Respect

We value every team member and recognise the contribution they bring to the business.

We listen, acknowledge effort and encourage honest, professional communication.

We treat customers with respect and take pride in delivering real value through our service.

We build strong, respectful relationships with suppliers based on clear communication and good business practice.

We speak openly, listen properly and treat people like people.

Service

We deliver service that goes beyond "just doing the job."

By planning properly and using the right skills and experience, we create a service experience that customers can rely on and recommend.

We aim to leave every customer confident in the work we've done, not confused or uncertain.

We want customers to come back, refer others and feel comfortable knowing they've found a team they can trust.

Customer loyalty is earned through consistency, not words.

Commitment

We are committed to finding the right solution, not the quickest shortcut.

We communicate clearly and honestly so customers can make informed decisions.

We do what we say we will do:

- We arrive on time
- We complete quality work
- We respect the property we are in
- We leave the site cleaner than we found it

Our word matters here. If we say it, we follow through.

Teamwork

The team is the backbone of everything we do.

We support each other, communicate openly and work together to get the job done properly.

We maintain a safe, positive workplace where people can do their best work.

We take pride in being part of a team that has each other's backs, not just when things are easy but when things get busy or challenging too.

We keep things professional, but we don't lose sight of enjoying the work and the people we work with.

These values aren't just words on a page. They are how we expect work to be done every day inside ABC Trade Business.

2.4 Who We Work With

INSTRUCTION:

Use this page to clearly explain who ABC Trade Business serves and what each customer type values, expects and struggles with.

This is not general marketing content. It is a practical guide to help the team understand how to communicate, prioritise and deliver service based on real customer needs.

Your message should:

- Clearly define the key customer groups the business works with
- Explain the real-world pain points and frustrations each group experiences
- Highlight what "good service" looks like from each customer's perspective
- Help both field staff and office staff understand how customer type influences communication, urgency and expectations
- Reinforce that different customers require slightly different approaches, but the same standard of professionalism applies across all work
- Keep the tone simple, practical and grounded in real trade experience
- Avoid marketing language, hype or generic customer statements

This section should help new team members understand:
"This is who we are working for, what matters to them and how we adapt our service to meet those expectations."

EXAMPLE:

This section defines the key market segments ABC Trade Business focuses on.

Understanding who we work with is essential to how we communicate, quote, prioritise work and deliver customer service.

Homeowners (Residential Customers)

Our primary customer base is homeowners located across Sydney.

They range from young families through to long-term homeowners and retirees. While their situations vary, they share a common expectation: they want a reliable, professional trades business that treats their home with respect.

Most homeowners we work with are house-proud. They care about how their property looks, how clean the work area is left and whether the job is done properly the first time. They are not just paying for a repair or installation. They are paying for peace of mind.

Their common pain points include:

- Difficulty finding tradespeople who turn up on time
- Poor communication or being left in the dark about job progress
- Uncertainty around pricing and unexpected costs
- Previous poor experiences with rushed or low-quality workmanship
- Feeling like their home is not treated with care

Our role is to remove that uncertainty. We focus on clear communication, respectful service, transparent pricing and consistent workmanship. Every interaction is designed to make the customer feel informed, confident and looked after from start to finish.

Strata & Real Estate Partners

We also work with strata managers and real estate professionals who are responsible for maintaining and managing properties on behalf of owners and tenants.

These customers are not just looking for a tradie. They are looking for a reliable service partner who makes their job easier.

They care deeply about their properties and their clients and their reputation is directly impacted by the quality and responsiveness of the trades they engage.

Their common pain points include:

- Slow response times from trades
- Poor communication between tenants, agents and trades
- Inconsistent quality across multiple jobs or sites
- Difficulty tracking job status and completion
- Trades who do not understand the urgency or compliance requirements of managed properties

Our focus with this group is reliability, responsiveness and professionalism. We understand that clear communication, accurate reporting and consistent follow-through are essential. The goal is to make property management easier, not harder.

Both customer groups expect professionalism, communication and quality workmanship.

Whether we are working in a family home or a managed property, the expectation is the same: do the job properly, communicate clearly and leave every site better than we found it.

This understanding of our customers directly shapes how we operate, communicate and deliver work every day.

2.5 How We Show Up For Our Customers

INSTRUCTION:

Use this page to clearly explain how your business expects every team member to show up for customers in real situations.

This is about behaviour, communication and experience, not just technical work.

Your message should:

- Define what great customer experience looks like from first contact to job completion
- Set expectations around communication, professionalism and attitude
- Emphasise clarity, honesty and keeping customers informed
- Highlight respect for the customer's home, time and situation
- Reinforce that every interaction reflects the business as a whole
- Keep language simple, practical and grounded in real job scenarios

This section should make it very clear:
"How we show up is just as important as the work we do."

EXAMPLE:

How we show up for customers is one of the most important parts of this business.

The quality of the work matters, but so does how the customer experiences us from the moment we arrive to the moment we leave.

Every job, every call and every interaction is a reflection of the business as a whole. Customers don't separate the person doing the work from the company name. They see it as one experience. That means how you show up matters just as much as what you do.

First Impressions Matter

We arrive on time, prepared and ready to work. We introduce ourselves clearly, communicate what we're there to do and set expectations early so the customer knows what's happening.

Professional doesn't mean complicated. It means calm, clear and confident.

Clear Communication Throughout the Job

Customers should never be left guessing.

We explain what we're doing, why we're doing it and what options they have in simple, easy-to-understand language. No jargon, no overcomplicating things.

If something changes during the job, we communicate it early and clearly.

Respect for the Customer's Home

We treat every home like it's our own.

That means being careful, clean and respectful at all times. Protecting surfaces, cleaning up as we go and leaving the space in better condition than we found it is the standard, not the exception.

How we leave a job site is often what customers remember most.

Honesty and Transparency

We don't guess, overpromise or hide behind technical talk.

If something is needed, we explain it clearly. If there are options, we present them honestly. If something can wait, we say so.

Trust is built through honesty, even when the conversation is not the easiest one.

Professionalism at All Times

How we speak, how we act and how we carry ourselves matters.

We stay respectful, patient and helpful even when jobs are busy or customers are unsure or stressed.

Every interaction is an opportunity to build trust or lose it.

Leaving a Lasting Impression

We don't just aim to finish the job. We aim to leave the customer confident they made the right choice.

That means:

- The work is completed properly
- The area is clean and tidy
- The customer understands what was done
- And they feel looked after throughout the process

How we show up for customers is what sets this business apart.

If we get this right consistently, everything else becomes easier. Repeat work, referrals and a reputation built on trust.

2.6 What Makes Us Different

INSTRUCTION:

Use this page to clearly explain what sets your business apart from others in the industry.

This is not about marketing language. It's about real, lived differences in how the business operates day to day.

Your message should:

- Clearly explain what makes the business different from typical trade companies
- Highlight standards, systems, communication and culture as key differentiators
- Speak to both field staff (tradies/apprentices) and office staff (admin/customer support)
- Reinforce that every role contributes to the customer experience
- Show that professionalism, structure and care exist across the whole business
- Keep tone simple, confident and grounded in reality, not hype

This section should help new team members understand:

"This is why we do things differently here and why it matters."

EXAMPLE:

What makes this business different isn't just the work we do. It's how we do everything around the work.

From the way a customer first contacts us, to how a job is scheduled, completed and followed up, there is intention behind every step. Nothing is left to chance or "just worked out on the day."

We Don't Operate in Chaos. We Operate with Structure

A lot of trade businesses run reactively. We don't.

Jobs are planned properly, communication is clear and expectations are set before anyone arrives on site. This means less confusion, fewer surprises and a smoother experience for both customers and the team.

Every Role Matters. Not Just the People on Site

What makes us different is that we understand the business only works when every part works together.

- Tradies and apprentices deliver the physical work
- Office and admin staff create the structure behind it
- Customer communication keeps everything connected
- Scheduling and coordination keep the day running smoothly

No single role is more important than another. They all rely on each other. When one part drops, the whole experience suffers.

We Care About the Details Most Businesses Ignore

Small things matter here:

- Clear communication with customers
- Accurate job notes and documentation
- Clean, respectful job sites
- Proper follow-up after work is completed
- Getting things right the first time wherever possible

These details are what separate a "trade job" from a professional service experience.

We Value Communication at Every Level

Whether you're on the tools or in the office, communication is expected to be clear, timely and respectful.

That means:

- Customers are kept informed
- The team is never left guessing
- Information is passed on properly, not assumed
- Issues are raised early, not ignored

Good communication is not optional here. It's part of the job.

We Build People, Not Just Fill Roles

We don't just focus on getting work done today. We focus on developing people over time.

That applies to everyone:

- Apprentices learning the trade
- Tradespeople improving consistency and leadership
- Office staff growing confidence in systems, communication and customer experience

If you're willing to learn, improve and take feedback, there is real opportunity to grow here.

We Treat It Like a Professional Business, Not Just a Trade Job

At the core, what makes us different is mindset.

We don't aim to "just get through the day."

We aim to run a professional, reliable and structured business that both customers and the team can trust.

That expectation applies to everyone, on-site and in the office.

This is what sets us apart.

Not one thing, but how everything connects, how everyone contributes and how seriously we take doing things properly.

2.7 Our Core Services & Priority Work

INSTRUCTION:

Use this page to clearly explain the main types of plumbing work the business completes and how we prioritise them in day-to-day operations.

This applies to all staff, particularly field staff (tradies and apprentices), but also office staff responsible for scheduling, quoting and customer communication.

Your message should:

- Clearly outline the main service categories the business focuses on
- Differentiate between emergency work, high-value specialist work and standard plumbing jobs
- Explain why some jobs are prioritised over others (urgency, safety, profitability, customer impact)
- Reinforce that prioritisation is part of how the business stays efficient and profitable, not just a scheduling preference
- Help field staff understand what matters most when making on-site decisions or escalating work
- Help office staff understand how to schedule and allocate work appropriately
- Keep tone practical, grounded and specific to real trade operations (not marketing language)
- Avoid vague or generic "service list" wording. This should reflect how the business actually operates day-to-day

This section should answer:

"What types of work do we do and how do we decide what gets priority?"

EXAMPLE:

At ABC Trade Business, not all work carries the same weight.

Some jobs are urgent because a customer genuinely needs help right now. Others are high value because they require specialist skills, equipment and often lead into bigger outcomes for the business.

And then there's standard day-to-day plumbing that keeps everything ticking over.

Knowing the difference is important. It helps us schedule properly, make better decisions on-site and focus our time where it actually matters.

The Work That Drives the Business

These are the jobs that make the biggest impact on both the customer and the business.

They usually require experience, the right equipment and a bit of thinking on your feet.

Blocked Drains & Drain Clearing

Blocked drains are one of the core parts of what we do.

They're rarely "just a blockage". More often than not, they turn into something bigger and that's where the real work starts.

From a blocked drain, we often move into:

- High pressure jetting
- CCTV drain inspections (where required)
- Excavation and pipe repairs
- Pipe relining solutions

These jobs are important because they're not one-and-done. Done properly, they lead to long-term fixes and bigger project work.

Drain Repairs, Excavation & Pipe Relining

Once we know there's damage in the system, this is where we step in properly.

This work includes:

- Dig-ups and pipe replacement
- Sectional drain repairs
- Full or partial pipe relining

It's skilled, it's specialised and it's a key part of how the business stays profitable and sustainable.

Hot Water Systems

When someone has no hot water, it's not just inconvenient, it stops their day completely.

That's why hot water work is always a priority.

It includes:

- Hot water repairs
- Full system replacements
- Emergency hot water failures
- Electric, gas and heat pump systems

These jobs often require quick decisions on-site and clear communication with the customer so they can get back up and running fast.

Emergency Plumbing (Drop Everything Jobs)

Some jobs can't wait.

When we get called for emergencies, everything else shifts.

These include:

- No hot water
- Blocked drains causing overflow
- Burst pipes
- Major leaks or flooding
- Sewerage issues or anything that affects health and safety

These jobs take priority in the schedule because the customer needs help immediately. No debate.

Standard Plumbing Work

This is the everyday work that keeps the business moving.

It's still important, still needs to be done properly and still represents the business. It just isn't urgent or high-value in the same way as the jobs above.

This includes:

- Leaking taps and mixers
- Toilet repairs and replacements
- Tapware installs
- Shower repairs and upgrades
- Rough-ins for renovations and new builds
- Fit-offs
- General maintenance plumbing
- Water pressure issues
- Minor pipe repairs
- Gas fitting

How We Actually Prioritise Work

In real terms, the day usually runs like this:

1. Emergency jobs (drop everything)
2. High-value specialised work (drains, relining, hot water systems)
3. Scheduled maintenance and planned jobs
4. General plumbing work

The Reality

This isn't just about being busy. It's about being smart with time.

Emergency work keeps customers safe and supported.

High-value work keeps the business strong.

Standard work keeps everything consistent and stable.

The key is knowing what you're standing in front of and making the right call at the right time.

Every job matters…but some jobs keep the business running more than others.

SECTION 3 – Getting To Know The Team

3.1 Getting To Know The Team

INSTRUCTION:

Use this page to clearly explain what the "Getting To Know The Team" section is, why it exists and how team members should engage with it.

This applies to all staff across the business, both field staff (tradies and apprentices) and office staff, as everyone is expected to contribute to and participate in team culture.

Your message should:

- Explain that this section is designed to build real connections between team members, not just store profiles
- Reinforce that strong teams are built through understanding, communication and everyday relationships
- Encourage staff to read through other team members' profiles and use them as a way to start conversations and build rapport
- Set the expectation that all team members will complete their own profile when onboarding or when requested
- Explain that profiles include both professional and personal information (where appropriate) to help strengthen team culture
- Reinforce that optional personal/family information helps build a more supportive and connected workplace
- Keep tone friendly, simple and culture-focused rather than formal or corporate
- Avoid HR-heavy or compliance language. This is about team connection, not administration

This section should answer:

"Why do we have a "Getting To Know The Team" section and how should I use it?"

EXAMPLE:

One of the best parts of working at ABC Trade Business is the people you'll be working alongside every day.

In a trade business, the work moves fast, the days are full and no two jobs are ever exactly the same.

That's why having a strong team culture matters. When you know the people around you, communication is easier, collaboration is smoother and the work environment becomes more enjoyable for everyone.

This section is designed to help build those connections from day one.

Getting To Know Your Team

Start by taking a few minutes to read through the profiles of your teammates.

Each profile gives you a small snapshot of who they are. Not just their role, but also what they're like as a person. Things like interests, hobbies, favourites and little details that help bring personality into the workplace.

As you read through, you don't need to memorise everything. Instead, pick up on small details that can help you connect naturally in day-to-day conversations.

A simple comment about someone's weekend, a shared interest or even remembering how they take their coffee can make a big difference in building strong working relationships.

These small moments are what turn a group of individuals into a proper team.

Adding Your Own Profile

Once you've had a look through the team, it's your turn to add your own profile.

If your page hasn't already been set up, speak with your manager and they will create one for you.

When it's ready, take a few minutes to complete it honestly and in your own words. This isn't about being perfect. It's about helping the rest of the team get to know you.

Your profile includes both work-related information and a bit about you outside of work. This helps your teammates understand who you are, how you work and what matters to you.

Why This Matters

Strong teams don't just happen by chance. They are built through small, consistent connections over time.

This section is one of the ways we make sure ABC Trade Business isn't just a place where people work, but a place where people actually know each other, respect each other and enjoy working together.

3.2 Team Member Profile - <Full Name>

INSTRUCTION:

Please note that this page is our official **Team Member Profile template**.

This template is designed to help build team connection, improve communication and support a positive workplace culture across the business.

If you need to update the template itself, you are welcome to edit it directly to better reflect your business.

When using this page for a new or existing team member, please follow the process below:

- Make a copy of this page for each individual team member
- Update the page title to include their full name
- Share the page link with the team member for completion
- Ensure they complete it within their first few days of employment (or as soon as practical for existing staff)

Once completed, this information can be used for team introductions, recognition, birthdays, toolbox meetings and internal communication where appropriate.

EXAMPLE:

TEAM MEMBER INSTRUCTION

👋 Welcome to the team! We're genuinely glad to have you here!

This page is simply a way for us to get to know you as a person, not just as a role in the business.

Starting a new job can feel like a lot at first, so this is designed to be easy, relaxed and something you can complete in your own time within your first few days.

There are no right or wrong answers. Just share whatever you feel comfortable with.

This helps us:

- Get to know you beyond the job title
- Build stronger relationships across the team
- Celebrate birthdays, milestones and achievements in a way that actually suits you
- Understand what motivates and supports you at work

There are also sections where you can share a bit about your interests, hobbies and life outside of work. They help create a more connected and enjoyable team culture.

Once you're done, simply remove this instruction block, save the page and let your manager know so we can share you with the rest of the team properly.

Welcome aboard! We're looking forward to working with you.

<INSERT PHOTO OF TEAM MEMBER>

The Basics

- Full Name:
- What do you like to be called?
- Role / Position:
- First Day with the Business:
- Birthday (Year Optional):

Tell Us About Yourself

- Give us the short version of your life story...
- What attracted you to joining our team?
- What do you enjoy most about working in the trades?
- What's something you're really good at?
- What's something you'd love to get better at?

Family & Friends (Optional)

- Partner's Name:
- Children's Names:
- Pets (because they count too):

Outside of Work

- What do you like doing when you're not at work?
- Any hobbies, sports, side projects or interests?
- What's your ideal weekend look like?
- What's something most people don't know about you?
- Any hidden talents?

Quick Fire Questions

- Coffee Order:
- Favourite Takeaway:
- Favourite Sweet Treat:
- Favourite Soft Drink:
- Favourite Music / Artist:
- Favourite Movie or TV Show:
- Favourite Sports Team (if any):
- Favourite Holiday Destination:
- Favourite Tool:

This or That?

- Early Bird or Night Owl?
- Coffee or Tea?
- Beach or Mountains?
- BBQ or Pizza?
- Summer or Winter?
- Plan Everything or Wing It?

One Last Question...

If your teammates could remember one thing about you, what would you want it to be?

SECTION 4 – The Way We Work

4.1 Daily Rhythm

INSTRUCTION:

Use this page to clearly explain how a normal workday runs inside your business.

This is about structure, routine and expectations, so new team members know what "a good day" looks like from start to finish.

Your message should:

- Explain how the day typically starts, runs and finishes
- Set expectations around punctuality, preparation and readiness to work
- Cover both field staff (tradies/apprentices) and office/admin staff where relevant
- Reinforce communication, planning and staying organised throughout the day
- Highlight that the rhythm of the day is designed to support efficiency and teamwork
- Keep tone simple, clear and practical. Not corporate or overcomplicated

This section should answer:
"What does a normal day actually look like here?"

EXAMPLE:

A good day at ABC Trade Business isn't accidental.

It comes from a simple rhythm that everyone follows, field and office, so the business stays organised, customers are looked after properly and the team isn't constantly firefighting.

Every day will look slightly different depending on jobs and priorities, but the way we move through the day stays the same.

Start of Day: Get Organised Before the Chaos Starts

How the day starts usually decides how the rest of it goes.

There's no room for turning up and then figuring it out.

Field Staff

Before you leave for your first job, you should already know:

- Where you're going first
- What tools or materials you need
- What the job is likely to involve

By the time you leave, you should be ready to work, not still preparing for work.

Once you're in the ute, the workday has started. You should already be switched on.

Office Team

The start of the day in the office is about getting control of the board early.

That means:

- Checking the schedule is accurate
- Making sure urgent jobs are covered
- Responding to overnight messages or bookings
- Supporting the field team with anything they need before they hit site

If the morning is organised, the rest of the day stays manageable.

During the Day: Keep It Moving, Keep It Clear

Once the day is underway, things will shift.

Jobs run over time, urgent calls come in, customers change their minds and unexpected issues show up. That's just the reality of the trade.

This is where communication matters most.

Field Staff

While you're on the tools, you're expected to:

- Keep the office updated as things change
- Flag issues early (not at the end of the job)
- Confirm changes before acting on assumptions
- Represent the business professionally on every site

If something doesn't look right or a job is heading off track, speak up early.

Office Team

The office keeps everything connected.

That means:

- Updating schedules as changes happen
- Communicating clearly with both customers and field staff
- Making sure no one is left guessing what's going on
- Supporting the team so they can keep jobs moving

The goal is simple…everyone knows what's happening without having to chase it.

End of Day: Don't Just Knock Off, Finish the Job

The way the day ends sets up tomorrow.

A messy finish today becomes a messy start tomorrow.

Field Staff

Before you finish for the day, make sure:

- Jobs are properly completed and documented
- Photos, notes and updates are uploaded
- The ute, tools and equipment are looked after
- You've got a clear understanding of what tomorrow looks like

Office Team

Before wrapping up, make sure:

- Jobs are correctly updated, closed or scheduled
- Customer communication is complete or noted for follow-up
- Any outstanding issues are handled or prepared for the next day
- The system is clean and ready for a fresh start in the morning

We don't leave loose ends hanging overnight if we can avoid it.

What Stays the Same Every Day

No matter what the schedule looks like, a few things never change:

- Be on time and ready to go
- Communicate early and clearly
- Stay organised, not reactive
- Respect customers, teammates and equipment
- Follow through on what you said you would do

This isn't about adding pressure or making things rigid.

It's about making the day predictable in a good way.

When everyone follows the same rhythm:

- The team stays aligned
- Jobs run smoother
- Stress goes down
- Customers get a better experience
- The business performs consistently

That's what a good day looks like here.

4.2 Communication Rules

INSTRUCTION:

Use this page to clearly define how communication works inside your business, both within the team and with customers.

This is about setting clear expectations so nothing gets missed, assumed or left too late.

Your message should:

- Explain how team members are expected to communicate with each other (internal)
- Explain how communication with customers should be handled (external)
- Reinforce clarity, timeliness and professionalism
- Set expectations around raising issues early, not after the fact
- Cover both field staff and office/admin roles
- Keep tone practical, direct and easy to follow

This section should answer:
"How do we communicate properly here?"

EXAMPLE:

Good communication is one of the biggest drivers of how well this business runs.

When communication is clear, early and consistent, jobs run smoothly, customers feel looked after and the team stays aligned.

When it's not, things fall apart quickly.

That's why we take communication seriously across every part of the business.

Internal Communication (Within the Team)

Communication inside the team should always be clear, timely and to the point.

We don't assume. We don't guess. We don't leave things unsaid.

What we expect:

- **Say it early**
  If something changes, is delayed or doesn't go to plan, communicate it straight away. Not at the end of the day.

- **Be clear, not vague**
  Give the right level of detail so others can act on the information. Half information creates more work.
- **Use the right channels**
  We use systems, phone calls and our WhatsApp team group to stay connected. Important updates about jobs, delays or issues should be shared where the right people will see them, not just mentioned in passing.
- **Keep everyone aligned**
  If it affects the job, the schedule or the customer, it needs to be communicated.
- **Respect people's time**
  Keep communication efficient and relevant. Not everything needs a long explanation, but it does need to be accurate.

This applies to everyone. Tradies, apprentices and office staff alike.

Toolbox Meetings (Team Alignment)

Toolbox meetings are held **fortnightly on Monday mornings**.

These meetings are a key part of how we stay aligned as a team.

Purpose of Toolbox Meetings:

- Share important business updates and operational changes
- Discuss safety reminders and site expectations
- Review recent wins, issues and lessons learned
- Highlight common job challenges and how to improve them
- Align the team on priorities for the weeks ahead
- Give everyone a chance to ask questions and raise concerns

Toolbox meetings are not optional discussion time. They are a structured communication tool that ensures everyone is operating with the same information.

Attendance and engagement are expected from all team members.

External Communication (With Customers)

How we communicate with customers shapes their entire experience.

They don't see behind the scenes. They judge us based on what we say, how we say it and how well we keep them informed.

What we expect:

- **Be clear and easy to understand**
  No jargon, no overcomplicating things. Explain what's happening in plain language.
- **Set expectations early**
  Let customers know what's happening, what to expect and any potential changes.
- **Keep them updated**
  If something changes (timing, scope, pricing) they should hear it from us first.
- **Be honest and upfront**
  No guessing, no overpromising. If you don't know, say so and find the answer.
- **Stay professional and respectful**
  Every interaction matters, whether it's in person, over the phone or in writing.

Non-Negotiables Across All Communication

No matter who you're speaking to, these rules apply:

- Don't leave people guessing
- Don't delay important information
- Don't assume someone else has said it
- Don't avoid difficult conversations

Instead:

- Communicate early
- Communicate clearly
- Communicate with respect

Good communication keeps everything moving.

If you get this right, jobs run smoother, the team works better together and customers trust us more.

4.3 Professional Conduct Onsite & In-Office

INSTRUCTION:

Use this page to clearly define the expected standard of behaviour across both on-site work and in-office environments.

This is about how people carry themselves, interact with others and represent the business day to day.

Your message should:

- Cover both field staff (tradies/apprentices) and office/admin team
- Set clear expectations around attitude, behaviour and professionalism
- Reinforce respect, accountability and consistency
- Include how to handle pressure, customers and team interactions
- Make it clear that behaviour reflects the business at all times
- Keep tone direct, practical and easy to apply

This section should answer:
"How am I expected to show up and behave here?"

EXAMPLE:

At ABC Trade Business, professionalism isn't something we turn on and off.

It's how we show up every day, especially when the job is busy, running late, something has gone wrong or a customer is stressed.

Because in those moments, people don't just see the job being done. They see how we behave while doing it.

How We Show Up (Everyone in the Team)

No matter your role, field or office, this is the baseline.

It's not complicated, but it matters:

- Be respectful in how you speak and deal with people
- Stay calm, even when things aren't going your way
- Own what you're responsible for
- Communicate clearly (say it early, say it properly)
- Be someone others on the team can rely on

You don't need to be perfect. But you do need to be consistent.

On-Site Conduct (Field Team)

When you're on-site, you are ABC Trade Business.

For the customer, you are the business in that moment.

They don't see what happens in the office. They don't see the scheduling, the pressure or the other jobs in the background. They only see you.

That's why how you show up matters.

On-site expectations:

- Be polite, respectful and approachable
- Speak clearly and keep things simple for the customer
- Present yourself properly (clean uniform, tidy appearance)
- Keep personal presentation at a professional standard
- Stay focused on the job, not distracted or disengaged
- Respect the customer's home or property like it's your own
- Keep noise, mess and disruption to a minimum
- Stay calm if something goes wrong. Don't react emotionally
- Handle conversations professionally, even when they're difficult

It's often the small things that stick with customers…how you speak, how you carry yourself, how tidy you leave the space.

That's what they remember.

In-Office Conduct (Admin & Support Team)

The office is where everything comes together.

If the office is clear, organised and calm, the field team can do their job properly. If it's not, everything downstream feels it.

Office expectations:

- Stay organised and across your tasks
- Communicate clearly with both customers and field staff
- Keep things moving. Don't let jobs sit unresolved
- Take ownership and follow things through properly
- Stay calm when things get busy or pressured
- Be respectful and supportive with the wider team
- Focus on solutions, not frustration

The tone set in the office carries through the whole business.

When Things Don't Go To Plan

They won't always go perfectly. That's just the reality of trade work.

What matters is what happens next.

When things go wrong:

- Say something early, don't sit on it
- Stay calm and think it through
- Focus on fixing it, not blaming it
- Ask for help if you need it
- Keep your professionalism intact

Most problems get worse because they weren't spoken about early enough, not because they happened in the first place.

Respect Across the Business

We treat people properly…always.

That includes:

- Customers: with patience and professionalism
- Teammates: with respect and support
- Suppliers: with fairness and clear communication

There's no situation where disrespect is acceptable.

The Standard We Hold

Professional conduct isn't about being formal or robotic.

It's about being steady.

If you show up the right way, do your job properly and treat people with respect, you're already doing it right.

That's what representing ABC Trade Business actually looks like.

4.4 Presentation Standards

INSTRUCTION:

Use this page to clearly define how presentation is expected across your business, including personal appearance, vehicles, equipment and workspaces.

This is about the visual standard of the business and how it's maintained day to day.

Your message should:

- Cover both field staff (tradies/apprentices) and office/admin team
- Set expectations for uniforms, grooming and personal presentation
- Include vehicle standards (cleanliness, organisation, upkeep)
- Include expectations for job sites and office/workspaces
- Reinforce that presentation directly impacts customer perception and trust
- Keep tone practical, clear and non-negotiable

This section should answer:
"What should things look like here and what's expected of me?"

EXAMPLE:

At ABC Trade Business, presentation is never an afterthought.

Before a customer sees the quality of the work, they see you, your vehicle and how you carry yourself.

That first impression sets the tone for everything that follows.

The same applies inside the business. How we look after our gear, vehicles and workspace is a direct reflection of how we operate.

We're not chasing perfection, but we are consistent about being clean, organised and professional.

Personal Presentation (Everyone in the Team)

Whether you're on-site or in the office, you're representing ABC Trade Business.

People notice it immediately.

What we expect:

- Look clean, tidy and presentable every day
- Wear your uniform properly (where applicable)
- Dress appropriately for your role and the environment
- Maintain good personal hygiene
- Present yourself in a way that reflects the business standard

For field staff:

- Uniform worn correctly and kept in good condition
- Safety gear used when required. No exceptions
- Beards clean and well-groomed (or clean shaven where applicable)

For office staff:

- Neat, professional appearance suitable for a customer-facing business
- Present in a way that reflects organisation and attention to detail

Vehicles (Field Team)

Your vehicle is often the first thing a customer sees before you even speak.

It sets the expectation for what kind of business we are.

What we expect:

- Kept clean on the outside (doesn't need to be spotless, just maintained)
- Inside kept organised and functional
- No rubbish, clutter or loose gear rolling around
- Tools and materials stored properly and safely
- Stock kept in a condition that's ready for use

If a customer looks at your vehicle and thinks it's disorganised, that impression carries through before the job even starts.

Tools & Equipment

We rely on our tools every day. They need to be treated that way.

Expectations:

- Kept clean and looked after
- Stored properly after use
- Used responsibly (no unnecessary damage or rough handling)
- Ready to go at the start of each job
- Any issues reported as soon as they're noticed

If something is broken or not working properly, don't leave it sitting there. Flag it early so it can be sorted.

Good gear, looked after properly, makes everyone's job easier.

Job Site Cleanliness (Field Team)

How we leave a site is just as important as how we fix the problem.

Customers remember it.

Expectations:

- Protect surfaces and surroundings before starting work
- Keep the site as clean as possible while working, not just at the end
- Remove waste and materials once the job is finished
- Leave the area clean, tidy and safe
- Do a final check before you walk away

A clean site is often the difference between "job done" and "great experience".

Office & Workspace Standards (Admin Team)

The office sets the tone for how the business runs.

If it's messy or disorganised, everything else follows.

Expectations:

- Workstations kept clean and organised
- Desks clear of unnecessary clutter
- Files and systems kept up to date and easy to follow
- Shared spaces respected and maintained
- A workspace that supports focus and efficiency

A clean office leads to clear thinking and smoother operations.

The Standard Across Everything

If someone can see it, it matters.

That includes customers, suppliers, teammates and anyone interacting with the business.

We aim to be:

- Clean
- Organised
- Professional
- Consistent

Presentation isn't about looking fancy. It's about showing care.

When we take pride in how things look and feel, people trust us before we even start talking.

SECTION 5 – Roles, Expectations & Accountability

5.1 Core Expectations (All Staff)

INSTRUCTION:

Use this page to define the non-negotiable expectations that apply to every team member, regardless of role.

This section sets the standard for behaviour, accountability and performance across the business.

This page should:

- Clearly outline what is expected from all staff day-to-day
- Focus on ownership, reliability and contribution to the team
- Set a consistent baseline before role-specific expectations are introduced
- Reinforce that these standards apply to everyone without exception
- Keep tone direct, practical and standards-driven (not overly motivational)

This section should answer:
"What is expected of me as a team member, regardless of my role?"

EXAMPLE:

These are the standards every team member is expected to meet.

They are not optional and they apply to everyone across the business.

Ownership & Responsibility

You are responsible for your work, your actions and your outcomes.

This means:

- Taking full ownership of tasks from start to finish, not just your part
- Following through on commitments without needing to be chased
- Taking responsibility when something goes wrong and focusing on fixing it
- Raising issues early instead of letting them grow into bigger problems
- Asking for help when needed, rather than guessing or avoiding the issue

Ownership means treating every job as if it reflects directly on you, because it does.

Time, Attendance & Reliability

Being reliable is a basic expectation and a key part of team performance.

This includes:

- Arriving on time, prepared and ready to start work, not just turning up
- Being consistent with attendance and not creating gaps in the workflow
- Communicating early if you are running late or unavailable (not after the fact)
- Following all scheduling, timesheet and job allocation processes
- Respecting other people's time, including customers and teammates

Unreliability creates delays, puts pressure on others and impacts the entire operation.

Team Contribution

You are part of a team and your actions affect everyone else.

This means:

- Communicating clearly so others have the information they need
- Supporting teammates when required, especially during busy periods
- Sharing updates that help the team stay aligned on jobs and priorities
- Following agreed systems so everyone is working the same way
- Maintaining a positive, respectful working environment

A strong team depends on individuals doing their part and helping others do theirs.

Communication & Professionalism

How you communicate reflects directly on the business, both internally and externally.

Expectations:

- Communicate clearly, directly and respectfully at all times
- Use the correct communication channels based on urgency and purpose
- Keep messages relevant, accurate and easy to understand
- Represent the business professionally with customers, suppliers and team members
- Avoid assumptions. Confirm important details when needed

Poor communication leads to mistakes, delays and a poor customer experience.

Work Standards

Every job must be completed to a high and consistent standard.

This means:

- Following correct procedures and company systems
- Prioritising safety at all times. No shortcuts
- Taking the time to do the job properly the first time
- Checking your own work before considering it complete
- Leaving jobs clean, safe and professional

Rushing or cutting corners creates rework, risk and damage to reputation.

Attitude & Approach

Your attitude influences your performance and the team around you.

Expectations:

- Show up willing to work and contribute
- Stay solution-focused when challenges arise
- Be open to feedback and direction from others
- Remain professional under pressure or during difficult situations
- Take initiative rather than waiting to be told what to do

A strong, consistent attitude keeps jobs moving and the team working effectively.

Accountability

You are accountable for your performance and how you meet expectations.

This includes:

- Delivering consistent results, not occasional effort
- Accepting feedback and making improvements where required
- Owning both successes and mistakes without deflection
- Understanding that your performance impacts the business and the team
- Being proactive in maintaining your standards, not reactive when issues arise

Accountability means being someone the team can rely on without question.

Every role is different but the standard is the same.

Take ownership, be reliable, contribute to the team, communicate clearly and do the job properly every time.

5.2 Tradesperson Specific Expectations

INSTRUCTION:

Use this page to define the expectations specific to qualified tradespeople working in the field.

This section builds on the core expectations and focuses on job ownership, customer interaction and maintaining high work standards on-site.

This page should:

- Clearly outline what is expected from tradies on every job
- Reinforce full ownership of jobs from start to finish
- Set clear standards for how tradies interact with customers
- Define quality expectations and responsibility for completed work
- Position tradies as accountable for both technical execution and customer experience
- Keep tone practical, direct and aligned with real on-site expectations

This section should answer:
"What is expected of me as a qualified tradesperson on every job?"

EXAMPLE:

As a qualified tradesperson, you are responsible for delivering the job, not just completing tasks.

You are accountable for the outcome, the customer experience and the quality of work.

Job Ownership

You own the job from start to finish.

This means:

- Taking responsibility for the entire job outcome, not just your portion
- Understanding the job scope before starting work
- Identifying issues, variations or risks early
- Communicating clearly with the office and customer throughout the job
- Managing your time on-site to keep the job moving efficiently
- Ensuring the job is completed properly before leaving site

If something is unclear, missing or not right, it is your responsibility to address it.

Client Interaction Standards

You are the face of the business on-site.

How you interact with customers directly impacts the reputation of the company.

Expectations:

- Be professional, respectful and approachable at all times
- Communicate clearly about what you are doing and why
- Set realistic expectations with customers (timing, scope, limitations)
- Keep customers informed of any changes or issues
- Listen to the customer and respond appropriately
- Present yourself and your work in a clean and professional manner

Every interaction should leave the customer confident in the work being done.

Quality Control on Work

You are responsible for the quality of your work. No one else.

This means:

- Completing all work to a high and professional standard
- Following correct procedures, codes and safety requirements
- Checking your work before considering the job complete
- Not cutting corners, even under time pressure
- Ensuring everything is functioning correctly before leaving site
- Leaving the work area clean, safe and presentable

If a mistake is made, it must be addressed properly, not ignored or covered up.

Attention to Detail

Quality comes from the details.

You are expected to:

- Notice small issues before they become bigger problems
- Ensure finishes are neat and professional
- Double-check critical elements of your work
- Take pride in how the final job looks and performs

Details are what separate average work from professional work.

Communication on Jobs

Strong communication is part of job ownership.

You should:

- Keep the office updated on job progress
- Raise variations, delays or issues immediately
- Provide clear information when support is needed
- Keep customers informed without overpromising

Lack of communication leads to confusion, delays and poor customer experience.

Problem Solving

Not every job will go to plan.

You are expected to:

- Stay calm and solution-focused when issues arise
- Assess the situation before acting
- Seek support when needed rather than guessing
- Make informed decisions within your level of authority

Good tradies don't avoid problems. They manage them properly.

You don't just complete work. You deliver the job.

Own it, communicate clearly and ensure the final result meets the standard every time.

5.3 Apprentice Specific Expectations

INSTRUCTION:

Use this page to define the expectations specific to apprentices in the business.

This section focuses on learning, attitude and development. Setting clear standards for how apprentices contribute while building their skills.

This page should:

- Explain that an apprentice's primary role is to learn while contributing to the team
- Set clear expectations around TAFE attendance and commitment to training
- Define how apprentices are expected to support their tradesperson on-site
- Reinforce responsibility for effort, attitude and growth
- Outline progression expectations and taking ownership of development
- Keep tone practical, structured and growth-focused (not overly soft or vague)

This section should answer:
"What is expected of me as an apprentice and how do I develop into a qualified tradesperson?"

EXAMPLE:

As an apprentice, your role is to learn the trade while contributing to the team.

You are not expected to know everything, but you are expected to show effort, take direction and continuously improve.

Learning Expectations (Including TAFE)

Your development is your responsibility.

This means:

- Being actively engaged in learning on the job every day
- Listening, observing and asking questions when unsure
- Taking notes or remembering key processes and instructions
- Applying what you learn on future jobs
- Showing initiative to build your skills over time

TAFE Expectations:

- Attend all scheduled TAFE classes
- Complete all required coursework and assessments on time
- Take TAFE seriously. It is a core part of your trade qualification
- Communicate any issues with attendance or progress early

Falling behind at TAFE or disengaging from learning will impact your progression.

Supporting Your Tradesperson

You are there to support the tradie you are working with.

This means:

- Following instructions clearly and promptly
- Preparing tools, materials and work areas ahead of time
- Anticipating what is needed next where possible
- Staying engaged in the job, not waiting to be told every step
- Helping keep the job running efficiently

Good apprentices make the tradie's job easier, not harder.

Attitude on the Job

Your attitude is one of the most important parts of your role.

Expectations:

- Be willing to learn and take direction
- Stay engaged and focused on the job
- Accept feedback without resistance
- Show respect to your tradesperson, team and customers
- Be reliable, punctual and prepared

A strong attitude will fast-track your development more than anything else.

Growth Path & Milestones

Your goal is to become a qualified and capable tradesperson.

Progression is based on:

- Skill development over time
- Ability to complete tasks with less supervision
- Understanding of systems, tools and processes
- Reliability and consistency in your work
- Attitude and willingness to improve

As you progress, expectations will increase.

You will be expected to:

- Take on more responsibility
- Work more independently
- Make decisions within your level
- Support newer apprentices when ready

Taking Ownership of Your Development

Your learning does not happen by accident.

You should:

- Take every opportunity to learn on-site
- Ask questions when you don't understand
- Learn from mistakes and improve
- Seek feedback on your performance
- Put in the effort to become better each day

The more you put in, the faster you will progress.

Common Mistakes to Avoid

- Waiting to be told everything instead of thinking ahead
- Not asking questions when unsure
- Repeating the same mistakes without improvement
- Disengaging from TAFE or on-site learning
- Poor attitude or lack of effort

These slow down your growth and impact the team.

You are here to learn, contribute and improve.

Show up, put in the effort, support your tradie and take ownership of your development.

That's how you become a qualified tradesperson.

5.4 Office Specific Expectations

INSTRUCTION:

Use this page to define the expectations specific to office team members.

This section focuses on customer experience, accuracy and supporting field operations, ensuring the office runs smoothly and supports the entire business.

This page should:

- Explain the office team's role in shaping the customer experience
- Set clear expectations around accuracy, organisation and attention to detail
- Define how the office team supports the field team and keeps jobs moving
- Reinforce responsibility for communication, coordination and follow-through
- Position the office team as a critical link between customers and field staff
- Keep tone practical, structured and operational (not overly corporate)

This section should answer:
"What is expected of me as part of the office team?"

EXAMPLE:

As part of the office team, you are responsible for keeping the business organised, customers informed and jobs flowing smoothly.

You are the central point of coordination between customers, field staff and management.

Customer Experience Standards

The office team plays a major role in how customers experience the business.

Expectations:

- Be professional, friendly and helpful in all interactions
- Respond to customer enquiries promptly and clearly
- Set accurate expectations around timing, scope and next steps
- Keep customers informed of any changes or delays
- Handle issues or complaints calmly and professionally
- Ensure every interaction reflects positively on the business

For many customers, the office is their first and most frequent point of contact. It sets the tone.

Accuracy & Attention to Detail

Accuracy is critical in admin work.

Small mistakes can lead to job delays, confusion or poor customer experience.

This means:

- Entering job details, notes and bookings correctly
- Double-checking information before confirming with customers or field staff
- Ensuring schedules are accurate and up to date
- Maintaining clean and organised records in systems
- Following processes consistently without shortcuts

Attention to detail keeps everything running smoothly behind the scenes.

Supporting the Field Team

The office exists to support the team on the tools.

Expectations:

- Provide clear, complete job information to field staff
- Respond quickly to job-related queries or requests
- Coordinate scheduling to keep jobs running efficiently
- Assist with materials, variations and customer communication
- Help resolve issues that arise during jobs

Strong support from the office allows tradies to focus on delivering the work.

Communication & Coordination

The office team is responsible for keeping information flowing across the business.

This includes:

- Communicating updates between customers and field staff
- Ensuring everyone has the correct, current information
- Using the correct communication channels for urgency and clarity
- Following up on outstanding items (quotes, approvals, scheduling)
- Keeping management informed of issues or bottlenecks

Good coordination prevents confusion and delays.

Organisation & Workflow Management

A well-run office keeps everything on track.

You are expected to:

- Stay organised across multiple jobs and tasks
- Prioritise work based on urgency and importance
- Keep systems updated in real time
- Avoid backlog by staying on top of daily tasks
- Manage workload proactively, not reactively

Disorganisation in the office creates flow-on issues across the entire business.

Problem Solving

Issues will come up. How they are handled matters.

You should:

- Stay calm and solution-focused
- Gather the right information before acting
- Communicate clearly with all parties involved
- Escalate when needed, without delay
- Follow through until the issue is resolved

The office team plays a key role in keeping problems contained and managed.

The office team keeps the business moving.

Be accurate, stay organised, communicate clearly and support the team. Everything else depends on it.

SECTION 6 – Systems That Run The Business

6.1 Job Management System

INSTRUCTION:

Use this page to explain the job management system your business uses and why it's critical to how the business operates.

This is not just about naming the software. It's about helping new team members understand how it supports their day-to-day work and why it must be used properly.

Your message should:

- Clearly state what system is used
- Explain what it's used for across the business
- Highlight how it supports communication, organisation and accountability
- Reinforce that accurate use of the system is non-negotiable
- Cover both field staff and office/admin use
- Keep tone practical and grounded in real use, not technical jargon

This section should answer:
"Why do we use this system and what does it mean for me?"

EXAMPLE:

We use **Aroflo** as our job management system.

This is one of the most important tools in the business. It's where jobs are created, scheduled, tracked, completed and recorded, from start to finish.

If it's not in Aroflo, it doesn't exist.

What Aroflo Is Used For

Aroflo is used across the entire business to keep everything organised and running smoothly.

It is used to:

- Create and schedule jobs
- Assign work to the field team
- Track job progress in real time
- Store job details, notes and history

- Upload photos and documentation
- Complete job cards
- Generate quotes and invoices

It connects the office and field team so everyone is working off the same information.

Why We Use It

Without a system like Aroflo, things get missed, miscommunicated or forgotten.

Aroflo gives us:

- **Clarity**: everyone knows what's happening and where things are at
- **Accountability**: work is tracked and recorded properly
- **Efficiency**: less back-and-forth, less confusion
- **Consistency**: every job follows the same process

It allows the business to run in a structured, professional way. Not off memory or guesswork.

Expectations for Field Staff (Tradies & Apprentices)

If you're on the tools, Aroflo is part of your job, not an add-on.

You are expected to:

- Check your jobs before arriving on site
- Review job notes and details properly
- Update job status as you go
- Add clear notes and relevant photos
- Complete job details accurately
- Prepare and present quotes on-site
- Invoice from site once work is complete
- Collect payment where applicable before leaving
- Flag issues or changes through the system

Good notes, clear quoting and accurate invoicing make life easier for everyone, especially the office and the customer.

Expectations for Office Staff (Admin Team)

For the office, Aroflo is the control centre.

You are expected to:

- Create and schedule jobs accurately
- Ensure job information is clear and complete
- Keep schedules up to date
- Monitor job progress and updates
- Follow up outstanding quotes in a timely manner
- Run reports to track performance (staff, jobs, marketing results)
- Provide clear reporting and insights to management
- Use job data to support invoicing, communication and decision-making

Accuracy and follow-through are critical. The field team and customers rely on it.

Non-Negotiables

- Jobs must be updated in real time
- Notes must be clear, useful and relevant
- Photos and documentation must be uploaded where required
- Quotes and invoices must be completed properly, not left incomplete
- No relying on memory or "I'll do it later"

If the system is not used properly, the whole business feels it.

Aroflo is not just software. It's how we stay organised, communicate properly and deliver a consistent experience.

Use it properly and everything runs smoother.

6.2 Project Management Platform

INSTRUCTION:

Use this page to explain the project management platform used inside the business and its purpose.

This is not a field tool. It is used by office staff and management only.

Your message should:

- Clearly state what platform is used
- Explain what it is used for in day-to-day operations
- Clarify that it is not used by field staff
- Show how it supports organisation, accountability and workflow visibility
- Explain how it helps manage tasks, projects and internal responsibilities
- Keep tone practical, clear and grounded in real business use

This section should answer:
"What is this tool for and who uses it?"

EXAMPLE:

We use **Asana** as our project management platform.

This tool is used by office staff and management only. It is not used by the field team.

What Asana Is Used For

Asana is where we manage internal tasks, projects and workflows that sit outside of day-to-day job scheduling.

It is used to:

- Plan and track internal business projects
- Manage ongoing tasks and responsibilities across the office team
- Coordinate marketing activities and campaigns
- Track onboarding, training and staff development tasks
- Manage system improvements and business updates
- Assign and monitor deadlines for internal work

It helps keep the business organised behind the scenes so nothing gets missed or forgotten.

Why We Use It

As the business grows, there are more moving parts happening outside of daily jobs.

Asana gives us:

- **Visibility**: everyone knows what needs to be done and by when
- **Accountability**: tasks are assigned, tracked and followed through

- **Structure**: no relying on memory, sticky notes or scattered conversations
- **Prioritisation**: clear focus on what matters most each week
- **Consistency**: repeatable systems for internal operations

It ensures the business side of things runs just as smoothly as the field work.

Who Uses Asana

Asana is used by:

- Office staff
- Management
- Leadership roles responsible for operations, marketing, systems and planning

Field staff do not need to use Asana. Their focus is Aroflo and job delivery.

How It's Expected to Be Used

To keep Asana effective, it must be:

- Kept up to date
- Clearly structured with tasks and deadlines
- Used consistently (not just when things are busy)
- Reviewed regularly to ensure nothing is slipping

If it's in Asana, it is being tracked and it is expected to be followed through.

Asana is not just a task list. It's how we manage the internal running of the business.

When used properly, it keeps everything organised, visible and moving forward without confusion.

6.3 Internal Communication Tools

INSTRUCTION:

Use this page to clearly explain the communication tools used inside the business and how each one should be used correctly.

This is about making sure everyone understands what tool to use, when to use it and why it matters.

Your message should:

- Clearly list the communication tools used in the business
- Explain the purpose of each tool and when it should be used
- Set expectations around proper use (avoiding confusion or duplication)
- Separate internal office communication from field communication where relevant
- Reinforce clarity, speed and professionalism in communication
- Keep tone practical, simple and easy to follow

This section should answer:
"What do we use to communicate and when should I use each one?"

EXAMPLE:

Clear communication is essential to how this business runs. To keep things organised and avoid confusion, we use specific tools for specific purposes.

Each tool has a role. Using the right one at the right time keeps everyone aligned and ensures nothing gets missed.

WhatsApp (All Staff)

WhatsApp is used across the entire business. Both field and office teams.

It is used for:

- Quick updates and time-sensitive communication
- Job-related alerts and live updates
- General team communication
- Sharing simple information that needs to be seen quickly

WhatsApp is for speed and visibility. Not detailed documentation.

If it is important but not urgent, it should still be properly recorded in Aroflo or the relevant system.

Phone Calls (Field & Office Communication)

Phone calls are used when communication needs to be immediate, clear or complex.

They are primarily used for:

- End-of-job updates from field staff to office
- Urgent issues or changes during a job
- Situations where messaging is not suitable or too slow
- Clarifying details quickly between office and field

If something is urgent or needs back-and-forth discussion, pick up the phone.

Email (Document Sharing & Formal Communication)

Email is used for structured communication and document sharing.

It is used for:

- Sending or receiving formal documents
- Sharing quotes, invoices and attachments
- Communication that needs to be recorded and referenced later
- External communication with suppliers, partners or customers when required

Email is not for urgent communication. It is for clarity, record-keeping and documentation.

Microsoft Teams (Office Staff Only)

Microsoft Teams is used internally by office and management staff.

It is used for:

- Internal office communication
- Planning discussions and coordination
- Sharing updates that relate to administration, scheduling and operations
- Team chats that support day-to-day office workflow

Teams is the central hub for office collaboration and internal discussion.

Field staff do not use Microsoft Teams.

How to Use These Tools Properly

To keep communication clear and effective:

- Use the right tool for the right purpose
- Avoid repeating the same message across multiple platforms unnecessarily
- Keep messages clear, relevant and to the point
- Make sure important information is also recorded in the correct system (Aroflo, Asana where relevant)

Each tool exists to make communication easier, not more complicated.

When used correctly, they keep the business moving smoothly, reduce confusion and ensure nothing important gets missed.

6.4 Other Platforms

INSTRUCTION:

Use this page to clearly explain the additional platforms used across the business and their purpose.

This section helps new team members understand what each system is for and who uses it, so there is no confusion about where information lives or how things are managed.

Your message should:

- Clearly list each platform used in the business
- Explain what each platform is used for and who uses it
- Separate finance, systems storage, CRM, security and general business tools
- Reinforce that each system has a specific purpose (no duplication or guessing)
- Include any additional common business platforms where relevant
- Keep tone simple, practical and easy to understand

This section should answer:
"What other systems do we use and what are they for?"

EXAMPLE:

Alongside our main job management and communication systems, we use several additional platforms that support different parts of the business.

Each system has a specific role and using the right system for the right purpose is important for keeping the business organised and running smoothly.

Xero (Finance System)

We use **Xero** as our finance platform.

This system is managed by the bookkeeper, accountant and finance team.

It is used for:

- Accounts management
- Payroll processing
- Tracking income and expenses
- Bank reconciliation
- Financial reporting

Field staff and general office staff do not work directly in Xero, but the accuracy of job data in other systems directly impacts what happens here.

1Brain (Systems & Policies Storage)

We use **1Brain** as the central storage system for all business processes, policies and procedures.

It is used to:

- Store onboarding and training materials
- Hold business systems and workflows
- Provide access to company policies and standards
- Keep documentation consistent and easy to find

This is the "single source of truth" for how things are done inside the business.

If you're unsure how something is done, this is where you check first.

<INSERT CRM SYSTEM NAME> (CRM System)

We use **<INSERT CRM SYSTEM NAME>** as our Customer Relationship Management (CRM) system.

It is used by office staff to:

- Store and manage customer details
- Track customer history and interactions
- Support quoting and follow-ups
- Manage customer communication and relationships
- Help identify repeat customers and opportunities

This system helps ensure no customer is forgotten and every interaction is tracked properly.

Microsoft 365 (Word, Excel, OneDrive, SharePoint)

We use **Microsoft 365** for day-to-day document creation, storage and collaboration.

It's one of the core tools that keeps the office side of the business organised, consistent and easy to work across as a team.

It is used for:

- Creating and editing documents (Word)
- Building and managing spreadsheets (Excel)

- Storing shared business files securely (OneDrive / SharePoint)
- Team collaboration on internal documents in real time
- Organising operational, admin and business resources in a structured way

Microsoft 365 ensures everyone is working from the same information, in the same place, with clear version control and easy access across the team.

Keeper (Password Management & Security)

We use **Keeper** as our password management and security platform.

It is used to:

- Securely store business logins and passwords
- Control access to systems and platforms
- Reduce risk of shared or insecure passwords
- Maintain security across all digital tools

No passwords should be stored in emails, notes or personal devices. Keeper ensures access is controlled, secure and properly managed.

File Storage Systems (Cloud-Based)

We use secure cloud-based storage systems for business files.

It is used for:

- Storing job photos and documentation
- Keeping records secure and accessible
- Sharing files between team members
- Backing up important business information

Marketing Platforms (Meta Ads, Google Business Profile Tools)

We use marketing platforms to manage advertising and online presence.

It is used for:

- Running paid advertising campaigns
- Managing business visibility online
- Tracking lead generation performance
- Updating business listings and reviews

These platforms support business growth and customer acquisition.

How to Think About Systems

Each platform has a clear role:

- **Aroflo** = Jobs and field operations
- **Asana** = Internal projects and tasks
- **Teams / WhatsApp / Email** = Communication
- **Xero** = Finance
- **<INSERT CRM SYSTEM NAME>** = Customer management
- **1Brain** = Systems and training
- **Keeper** = Security and access control

When systems are used correctly, everything becomes clearer, safer and easier to manage.

Mixing systems or storing information in the wrong place creates confusion and risk.

Good system use isn't about software. It's about clarity, consistency and making the whole business easier to operate.

6.5 Quoting & Invoicing Workflow

INSTRUCTION:

Use this page to clearly explain how quoting and invoicing works inside the business from start to finish.

This is a critical revenue process, so it must be simple, consistent and followed exactly the same way every time.

Your message should:

- Clearly explain the full quoting process from request to delivery
- Clearly explain the invoicing process from job completion to payment
- Define who is responsible at each stage (field vs office)
- Reinforce accuracy, timing and follow-through as non-negotiables
- Include on-site quoting, variations and approvals where relevant
- Keep tone practical, structured and easy to follow

This section should answer:
"How do quotes and invoices actually move through the business?"

EXAMPLE:

Quoting and invoicing is how the business turns work into revenue. It must be handled clearly, accurately and without delay.

There are two key parts to this process:

1. Quoting (before or during the job)
2. Invoicing (after the job is completed)

Quoting Process

Quotes can be created either by the office team or by field staff on-site, depending on the job.

Field Staff Responsibilities:

- Identify and explain work required to the customer
- Provide clear options where needed
- Present quotes on-site when required

- Ensure the customer understands what is included
- Capture approval before proceeding where necessary
- Record all quote details in Aroflo (including any photos or supplier quotes uploaded to the documents tab)

Office Responsibilities:

- Prepare quotes where required
- Ensure pricing, scope and details are accurate
- Send quotes to customers in a timely manner
- Follow up outstanding quotes
- Update status and track outcomes

The goal is simple: clear quotes, quickly delivered and actively followed up.

Invoicing Process

Invoicing is completed once the job is finished. This is done on-site by the tradespeople.

Field Staff Responsibilities:

- Complete job details in Aroflo before leaving site
- Ensure all work, notes and photos are recorded
- Invoice from site
- Collect payment on completion when required
- Confirm job is marked correctly as completed

Office Responsibilities:

- Ensure job data is complete
- Ensure invoice has been created, payment collected and invoice emailed to the customer by the tradesperson.
- Process and issue invoices where not completed on-site
- Reconcile payments and follow up outstanding invoices
- Maintain accurate financial records in coordination with finance

Non-Negotiables

- Quotes must be clear, accurate and actioned promptly
- No job should be left without proper documentation
- Invoices must match the work completed
- Payments must be recorded correctly
- No delays in follow-up for quotes or outstanding invoices

A clear quoting and invoicing process means:

- Faster approvals
- Faster payments
- Less confusion for customers
- Stronger cash flow for the business

6.6 Scheduling & Dispatch Process

INSTRUCTION:

Use this page to clearly explain how jobs are scheduled and dispatched across the business.

This is about coordination, timing and making sure the right person is on the right job at the right time.

Your message should:

- Explain how jobs are scheduled and allocated
- Define the role of office vs field teams in the process
- Reinforce communication and accuracy as key to smooth operations
- Highlight flexibility when urgent jobs or changes arise
- Emphasise reducing downtime, confusion and double-handling
- Keep tone structured, practical and operational

This section should answer:
"How do jobs get scheduled and sent out to the team?"

EXAMPLE:

Scheduling and dispatch is how we organise the day-to-day flow of work across the business.

It ensures the right technician is sent to the right job at the right time, with the right information.

How Scheduling Works

All jobs are scheduled through the job management system and coordinated by the office team.

Office Responsibilities:

- Schedule all incoming jobs based on priority and availability
- Allocate work to the most suitable team member
- Consider skill set and required equipment when assigning jobs

- Factor in geographic location of technicians to reduce travel time and improve efficiency
- Ensure job details are complete before dispatch
- Adjust schedules when urgent or priority jobs come in
- Communicate changes clearly and early to the field team

Allocation Principles (How We Decide Who Gets What Job)

When assigning work, the office considers:

- **Skill set**: matching the job to the right trade capability and experience level
- **Equipment requirements**: ensuring the technician has the correct tools for the job
  - e.g. blocked drains requiring a high-pressure water jetter
- **Geographic location**: where possible, jobs are grouped so technicians work within their area
  - e.g. a technician based in the Eastern Suburbs will typically start and finish in that area where practical
  - this reduces unnecessary travel, improves efficiency and helps keep the day flowing smoothly
- **Job urgency and priority**: emergency and time-sensitive work is prioritised accordingly

The goal is simple: fewer delays, better productivity and the right person doing the right job the first time.

Dispatch Process

Once a job is scheduled, it is dispatched to the field team.

Field Staff Responsibilities:

- Review assigned jobs before starting the day
- Confirm understanding of job details and location
- Arrive on time and prepared
- Communicate delays or issues immediately
- Keep office updated on job progress throughout the day

Changes, Urgent Jobs & Flexibility

No day is ever completely fixed.

Jobs may change due to urgency, customer needs or unexpected issues.

When this happens:

- Office communicates changes clearly and quickly
- Field staff adjust and respond professionally
- Everyone works together to minimise disruption

Flexibility is part of the job, but communication keeps it controlled.

Non-Negotiables

- Every job must be scheduled properly in the system
- No verbal-only scheduling or assumptions
- Changes must be communicated, not assumed
- Field team must confirm understanding of daily schedule
- Office must maintain accurate, up-to-date dispatch information

Why This Process Matters

When scheduling and dispatch is done properly:

- The day runs smoother
- Less time is wasted
- Customers are better informed
- The right technician attends the right job the first time
- The team stays organised and in control

This process is the backbone of a well-run day.

SECTION 7 – Getting Work Done (Day-to-Day Operations)

7.1 From Job Booking → Job Completion

INSTRUCTION:

Use this page to clearly explain the full end-to-end journey of a job inside the business, from the moment it is booked through to final completion and closure.

This is a core operational process, so it must be simple, consistent and easy for both field and office teams to follow.

Your message should:

- Clearly map out each stage of the job lifecycle
- Show how office, tradies and apprentices each contribute at different points
- Reinforce communication, preparation, execution and follow-through
- Highlight where Aroflo and other systems are used in the process
- Emphasise accountability at every stage
- Keep tone practical, structured and easy to follow

This section should answer:
"What actually happens to a job from start to finish?"

EXAMPLE:

Every job in the business follows a clear and consistent journey. When each stage is done properly, work flows smoothly, customers are informed and nothing gets missed.

This is the full lifecycle of a job. From first booking through to completion and closure.

1. Job Booking (Office)

This is where everything starts.

The office team is responsible for:

- Receiving the customer request
- Logging the job into Aroflo
- Capturing accurate customer and job details
- Identifying urgency and priority
- Scheduling the job appropriately
- Assigning the correct tradie or apprentice team

At this stage, accuracy is everything. A well-set job makes everything that follows easier.

2. Job Scheduling & Preparation (Office + Field)

Once booked, the job is prepared for execution.

Office responsibilities:

- Confirm schedule and time allocation
- Ensure job notes are complete and clear
- Provide any known job history, customer notes or site-specific information that may impact safety
- Communicate updates or changes early
- Highlight any known high-risk flags (if previously recorded on the job or site)

Field staff responsibilities (Tradies & Apprentices):

- Review job details before the job starts
- Understand scope, location and expectations
- Prepare tools, materials, PPE and equipment
- Clarify anything unclear before arrival
- Ensure they are fit for work and ready to complete the job safely

No job should be started without clear understanding of what is required.

3. On-Site Arrival & WHS Risk Assessment (Field Staff)

When arriving on site, safety comes first, before any customer interaction or work discussion.

Mandatory WHS Step (Non-Negotiable)

Before speaking with the customer or commencing any work, the technician must complete an on-site risk assessment.

Upon arrival, the technician must:

- Conduct an on-site risk assessment immediately on arrival
- Identify hazards specific to the site and task
- Assess access, environment and working conditions
- Determine required control measures (PPE, isolation, signage, etc.)
- Confirm the area is safe to proceed
- Resolve or control any immediate hazards where possible
- Only once the site is deemed safe, proceed to customer engagement

If the site is not safe, work does not proceed until risks are controlled.

This applies to every job, every time, regardless of familiarity or job size.

4. Customer Engagement (Field Staff)

Once the site has been assessed and deemed safe, engagement with the customer can begin.

Field staff must:

- Introduce themselves clearly to the customer or site contact
- Confirm scope of work
- Communicate what will happen during the job
- Maintain professionalism and respect at all times

This ensures the customer experience starts from a safe and controlled environment.

5. Work in Progress (Field Staff & Communication)

This is where the work is carried out.

Tradies are responsible for:

- Leading the job and ensuring quality workmanship
- Managing scope and decision-making on-site
- Communicating any changes or issues early
- Presenting options or quotes where required
- Identifying additional safety risks or compliance issues as they arise

Apprentices are responsible for:

- Supporting the tradie effectively
- Learning and following instructions carefully
- Maintaining cleanliness and organisation
- Asking questions and building capability

Throughout the job:

- Updates must be communicated when needed
- Issues must be raised early, not at the end
- The customer must be kept informed in simple language

6. Completion of Work, Safety Checks & Reporting (Field Staff)

Before leaving site, the job must be properly finished and documented.

Field staff must:

- Ensure all work is completed to standard
- Complete final WHS considerations relevant to the job
- Clean and tidy the work area
- Take required photos and documentation
- Update job notes in Aroflo
- Confirm any variations or additional work
- Offer or complete a Safety Inspection Report (where applicable as an upsell/cross-sell opportunity)
- Ensure all required job checklists are completed in full before sign-off
- Invoice on-site
- Collect payment

Job checklists are mandatory. They ensure consistency, compliance and quality control across every job.

No job is considered complete until all required checklists are finalised.

7. Job Wrap-Up (Office)

Once the field team has completed the job, the office finalises the process.

Office responsibilities:

- Review job notes, WHS records and documentation
- Ensure checklists and compliance items are completed
- Ensure invoicing is complete and accurate
- Follow up any missing information
- Confirm payment status
- Store records correctly for future reference

8. Post-Job Follow-Up (Office)

Where required, the office may:

- Follow up outstanding quotes

- Check customer satisfaction
- Handle any issues or callbacks
- Ensure records are updated for reporting and review

Every job must move cleanly through each stage, without gaps, assumptions or missing information.

If one part is missed, the whole process breaks down.

When this process is followed properly:

- Jobs run smoothly
- Communication stays clear
- Safety is always assessed before work begins
- Customers have a better experience
- The business stays organised and efficient

This is how we ensure every job is completed properly, from start to finish.

7.2 What "A Good Job" Looks Like

INSTRUCTION:

Use this page to clearly define what a high-quality job looks like inside the business.

This is not just about technical work. It's about the full experience from start to finish.

Your message should:

- Define what a "good job" actually means in real, practical terms
- Cover both field staff (tradies/apprentices) and office/admin contribution
- Include workmanship, communication, cleanliness, documentation and customer experience
- Reinforce consistency and pride in work
- Make expectations clear without being overly technical or complicated
- Keep tone simple, direct and easy to understand

This section should answer:
"How do I know if I've done a good job here?"

EXAMPLE:

A good job is not just about fixing the problem.

It's about delivering a complete experience, where the work is done properly, the customer is informed and the job is finished cleanly from start to finish.

Every role contributes to what a "good job" looks like.

Every interaction with the customer, every touchpoint, is a building block that makes up 100% of the customer experience. From a tidy, tucked-in shirt, to a smile on your face, to clear communication, to a quality repair, to a clean work area, to a seamless payment process and everything in between, it all adds up.

The customer should walk away thinking:
"I would get these guys back in a heartbeat."

For Field Staff (Tradies & Apprentices)

A good job on-site means:

- The work is completed properly and safely
- The customer understands what was done and why
- Communication is clear throughout the job
- Options and quotes are explained simply when required
- The job is finished without shortcuts or assumptions
- The site is left clean, tidy and respectful

It also means:

- Tools and equipment are looked after
- Any changes or issues are communicated early
- Photos and notes are recorded properly in the system
- Invoicing and payment are handled correctly before leaving site

If the customer is confident, informed and happy when you leave, you're on the right track.

For Office Staff (Admin & Support Team)

A good job is not finished when the tools are packed up.

Office staff play a key role in what a "good job" looks like by ensuring:

- Job details are accurate and complete in the system

- Quotes are clear, correct and followed up promptly
- Communication with the customer is timely and professional
- Invoicing is completed correctly and on time
- No missing information is left unresolved
- Job records are properly stored and closed off

If the systems are clean, accurate and up to date, the job is properly finished.

What Customers Experience in a Good Job

From the customer's perspective, a good job feels like:

- They were kept informed the whole time
- The person on-site was professional and respectful
- The problem was explained clearly and solved properly
- There were no surprises or confusion
- The site was left clean and tidy
- The whole process felt organised and easy

Customers don't see the internal systems. They feel the result of them.

The Standard We Hold

A good job is:

- Done properly, not rushed or patched
- Communicated clearly, not assumed
- Documented accurately, not left incomplete
- Finished cleanly, not left messy or half-done
- Handled professionally from start to finish

The Real Test

If we had to send another team member to the job site and they could clearly understand exactly what was done, how it was done and what was left behind. That is a good job.

Consistency is what turns individual good jobs into a strong business reputation.

Every job matters. Every detail counts.

7.3 Documentations & Notes

INSTRUCTION:

Use this page to clearly explain how documentation and job notes should be completed inside the business.

This is a critical part of how the business operates day-to-day and directly impacts quoting, invoicing, customer service and accountability.

Your message should:

- Explain why documentation and notes are important
- Set clear expectations for field staff (tradies/apprentices) and office/admin staff
- Define what "good notes" look like in practice
- Reinforce accuracy, clarity and timeliness
- Highlight the use of systems (especially Aroflo)
- Keep tone practical, direct and easy to follow

This section should answer:
"Why do we document work and what is expected?"

EXAMPLE:

Good documentation is one of the most important habits in the business.

If it isn't recorded properly, it didn't happen in the system and that creates confusion, delays and missed information.

Documentation is what connects the field work to the office, the customer and the financial side of the business.

Why Documentation Matters

Clear and accurate notes help us:

- Understand what was done on each job
- Support accurate quoting and invoicing
- Keep customers informed and confident
- Track job history for future work
- Reduce mistakes and missed details
- Maintain accountability across the team

Good notes make everyone's job easier. Bad notes create problems for everyone else.

Expectations for Field Staff (Tradies & Apprentices)

Field staff are responsible for recording what happens on-site.

You are expected to:

- Add clear job notes in Aroflo as the job progresses
- Record what work was completed (not just that it was done)
- Note any changes, issues or additional work required
- Upload photos where required to support the work completed
- Record customer conversations where relevant (especially scope changes or approvals)
- Ensure notes are completed before leaving site

Good notes should allow someone else to understand the job without needing to call and ask questions.

What Good Job Notes Look Like

Good notes are:

- Clear and easy to understand
- Specific about what was done
- Relevant to the job outcome
- Free from unnecessary detail or confusion
- Completed in real time or immediately after the job

Example of good structure:

- What the issue was
- What was found on inspection
- What work was completed
- Any changes or additional work
- Any customer approvals or discussions
- Final outcome

Expectations for Office Staff (Admin Team)

Office staff are responsible for ensuring documentation supports the full business process.

You are expected to:

- Check job notes are complete and accurate
- Follow up missing or unclear information
- Ensure documentation supports invoicing and quoting
- Maintain organised records in the system
- Use notes for reporting and customer communication
- Ensure consistency across all job records

If the field team provides the raw information, the office ensures it is complete and usable.

Timing of Documentation

Documentation should never be left too late.

- Field notes should be updated during or immediately after the job
- Photos should be uploaded while still on-site where possible
- Office follow-ups should be completed promptly after job completion

Delays in documentation lead to missing information and errors later in the process.

Non-Negotiables

- Every job must have clear notes
- Photos must be uploaded where required
- Changes and variations must be recorded
- No relying on memory at the end of the day
- No leaving jobs "to update later" and forgetting

Good documentation is not extra work. It is part of doing the job properly.

When notes are clear and complete:

- Jobs run smoother
- Invoicing is faster and more accurate
- Customers are better supported
- The whole business stays aligned

This is one of the simplest ways to improve quality across everything we do.

7.4 Handling Issues On The Job

INSTRUCTION:

Use this page to clearly explain how issues should be handled when things don't go to plan on a job.

This is about problem-solving, communication and professionalism under pressure.

Your message should:

- Define what counts as an "issue on the job"
- Explain how both field staff (tradies/apprentices) and office/admin staff should respond
- Reinforce early communication and escalation
- Encourage solution-focused thinking rather than blame
- Highlight customer communication expectations during issues
- Keep tone practical, calm and easy to follow

This section should answer:
"What do I do when something goes wrong on a job?"

EXAMPLE:

Issues on the job are normal. No job runs perfectly every time. Unexpected problems, changes in scope or site conditions will happen.

What matters is how those issues are handled in real time.

We don't ignore problems, guess or leave them until later. We deal with them properly, as they happen.

What Counts as an Issue

An issue on the job can include:

- Unexpected site conditions
- Additional or changed scope of work
- Parts or materials not fitting or unavailable
- Customer requesting changes during the job
- Safety concerns or hazards
- Delays or access problems
- Anything that affects time, cost or outcome of the job

If it changes the job, it needs to be addressed.

Expectations for Field Staff (Tradies & Apprentices)

Field staff are the first point of contact when issues arise on-site.

You are expected to:

- Identify issues early, not after the fact
- Pause and assess before continuing work
- Communicate clearly with the office when something changes. If a serious risk to your health or safety at a job, contact your team leader.
- Explain the issue in simple, factual terms
- Offer solutions or options where possible
- Keep the customer informed in a calm and professional way
- Record the issue in Aroflo with clear notes and photos

Do not assume. Do not ignore. Do not "just fix it and hope for the best."

If it affects the job, it must be communicated.

Expectations for Office Staff (Admin Team)

The office supports the field team in resolving issues quickly and clearly.

You are expected to:

- Respond promptly when issues are raised
- Help assess options or solutions where required
- If the job poses a serious health or safety risk, get the team leader involved
- Update job details, quotes or schedules as needed
- Communicate changes to customers clearly and professionally
- Ensure documentation is updated in the system
- Support the field team in making informed decisions

The goal is to keep the job moving without confusion or delay.

Customer Communication During Issues

When issues arise, customers must be kept informed.

We expect:

- Clear explanation of what has changed
- Honest communication about impact (time, cost, outcome)
- Simple language. No jargon or technical overload
- Calm and professional delivery at all times
- No surprises at the end of the job

Customers are more understanding when they are kept informed early.

Problem-Solving Approach

When issues come up, the focus should always be:

- What is the problem?
- What are the options?
- What is the best solution for the customer and the job?

We don't focus on blame. We focus on resolution.

Non-Negotiables

- Issues must be communicated early
- No hidden problems or silent fixes
- No assumptions without confirmation
- All changes must be recorded in the system
- Customers must be kept informed

The Standard We Expect

A well-handled issue looks like:

- The problem is identified early
- The office is informed quickly
- The customer understands what's happening
- A solution is agreed and documented
- The job continues without confusion

Handling issues properly is not about avoiding problems. It's about controlling them.

When this is done well, jobs stay on track, customers stay confident and the team stays in control.

SECTION 8 – Tools, Equipment & Resources

8.1 Devices & Responsibilities

INSTRUCTION:

Use this page to clearly explain what devices are used in the business and the responsibilities that come with them.

This is about care, accountability and proper use of business technology.

Your message should:

- Clearly list the devices used by field and office staff
- Explain who uses what (mobile, tablets, computers)
- Set expectations around care, security and responsible use
- Reinforce that devices are tools for work, not personal use
- Include basic responsibility expectations (damage, loss, security, usage)
- Keep tone practical, simple and accountability-focused

This section should answer:
"What devices do we use and what am I responsible for?"

EXAMPLE:

Devices are essential tools in how we run the business day-to-day. They keep us connected, organised and able to deliver work efficiently.

Every device issued by the business is the responsibility of the person using it. That means looking after it, using it properly and treating it as a work tool, not personal property.

Device Allocation & Setup

The business provides devices based on the requirements of each role.

All devices are configured and set up by the business to ensure team members have the tools they need to perform their job effectively from day one.

Office Staff

Office-based mobile phones remain in the office and are used as shared business communication devices where required.

These devices are primarily used for team communication, supplier contact, scheduling and day-to-day business operations.

Field Staff (Tradies & Apprentices)

Field staff will be provided with a business mobile phone upon commencement of employment.

The phone will be pre-configured and ready for use, including:

- Relevant business email accounts
- WhatsApp and team communication channels
- Mobile data access
- Required business applications
- Job management system access
- Any other software required to perform the role

These phones are issued to support day-to-day field operations and ensure team members remain connected to the office, customers and business systems throughout the day.

As a business-issued device, the phone remains the property of the business and must be returned upon request or at the conclusion of employment.

Field staff are responsible for:

- Keeping the phone secure and protected
- Ensuring it remains charged and operational
- Reporting any damage, loss or technical issues immediately
- Using the device primarily for business purposes

The mobile phone is a critical operational tool and is an important part of how we communicate, manage jobs and deliver service to our customers.

Mobile Phones (Business-Issued Devices)

Mobile phones are used by both field and office staff for communication and coordination.

Used for:

- Calls and urgent communication
- WhatsApp team updates
- Job-related coordination
- Customer communication (where applicable)

Responsibilities:

- Keep the phone charged and accessible during work hours
- Respond to work-related communication in a timely manner
- Use it professionally at all times
- Do not misuse for unrelated personal activity during work time
- Report damage or issues immediately

Phones are a core communication tool, not optional.

Tablets (Field Staff – Tradies & Apprentices)

Tablets are used by field staff to access job information and systems while on-site.

Used for:

- Viewing job details in Aroflo
- Updating job notes and progress
- Uploading photos and documentation
- Completing job information and records
- Supporting quoting and invoicing

Responsibilities:

- Keep the tablet secure at all times
- Ensure it is charged before starting the day
- Use it only for job-related work
- Keep it clean and protected on-site
- Update job information in real time
- Report any damage or issues immediately

The tablet is a critical job tool. Not an accessory.

Computers (Office Staff)

Computers are used by office and admin staff to run the operational side of the business.

Used for:

- Scheduling and job management
- Customer communication

- Quoting, invoicing and reporting
- System management (Aroflo, Asana, CRM, etc.)
- Document creation and storage

Responsibilities:

- Keep systems organised and up to date
- Ensure files and data are stored correctly
- Use business systems properly (no shortcuts or workarounds)
- Maintain security and access control
- Keep desktops and files organised and easy to navigate
- Report technical issues promptly

Computers are the control centre of the business operations.

General Device Expectations (Everyone)

Across all devices:

- They must be treated with care and respect
- They are business tools, not personal devices
- Security and access must be taken seriously
- Any damage, loss or issues must be reported immediately
- Devices must be used in line with their intended purpose

The Standard We Expect

If you are trusted with a device, you are trusted with responsibility.

Looking after your tools means:

- The business runs smoothly
- Communication stays reliable
- Work is not interrupted
- Systems remain secure and effective

Devices are what keep the business connected and operational. They must be treated that way.

8.2 Vehicles & Responsibilities

INSTRUCTION:

Use this page to clearly explain how business vehicles are used and the responsibilities that come with them.

This section is focused primarily on field staff (tradies and apprentices), as office staff are not assigned vehicles.

Your message should:

- Clearly define who uses business vehicles
- Set expectations around care, cleanliness and professionalism
- Explain how vehicles represent the business on and off site
- Cover safe use, maintenance and responsibility for condition
- Include rules around storage of tools, stock and cleanliness
- Reinforce accountability (damage, reporting issues, misuse)
- Keep tone practical, direct and responsibility-focused

This section should answer:
"What is expected of me when using a business vehicle?"

EXAMPLE:

Business vehicles are a key part of how we operate in the field. They are not just transport. They are mobile workspaces and a direct reflection of the business.

For field staff, how a vehicle is looked after says a lot about how the job will be carried out.

Office staff are not assigned vehicles.

Who Uses Business Vehicles

Business vehicles are allocated to:

- Tradies
- Apprentices (where applicable)

Each vehicle is assigned to support daily job delivery, transport tools and materials and represent the business on-site.

General Expectations

Every vehicle must be:

- Clean
- Organised
- Safe to operate
- Maintained in good working condition

Vehicles should always reflect professionalism, both when arriving at a customer's property and when being seen in public.

Cleanliness & Presentation

Vehicles must be kept in a tidy and professional condition at all times.

Expectations include:

- No rubbish left inside the vehicle
- Tools and equipment stored properly after use
- Cab and storage areas kept clean and organised
- Regular cleaning maintained (not only when it becomes an issue)
- No unnecessary clutter or personal items

A clean vehicle builds trust before you even step out.

Tools, Stock & Storage

Vehicles are also storage for tools and materials.

You are responsible for:

- Ensuring tools are stored securely
- Keeping stock organised and accounted for
- Preventing damage caused by poor storage or carelessness
- Checking vehicle contents regularly
- Reporting missing or damaged items

Everything in the vehicle is part of your working responsibility.

Care, Maintenance & Safety

Vehicles must be treated with care at all times.

Expectations include:

- Driving safely and responsibly at all times
- Reporting any damage, faults or issues immediately
- Keeping the vehicle clean inside and out
- Ensuring it is roadworthy and safe to operate
- Refuelling and basic upkeep as required

If something is wrong, it must be reported early, not ignored.

Professional Representation

Your vehicle represents the business wherever it goes.

That means:

- Parking appropriately at customer sites
- Maintaining a professional appearance at all times
- Avoiding unsafe or careless driving behaviour
- Ensuring signage and branding is respected and maintained

Customers often see your vehicle before they meet you. First impressions matter.

Accountability

You are responsible for the vehicle you use.

That includes:

- Condition of the vehicle during your use
- Cleanliness and organisation
- Reporting issues or damage immediately
- Ensuring tools and equipment are secure
- Using the vehicle appropriately for work purposes only

Neglect or misuse of vehicles is taken seriously, as it impacts safety, cost and business reputation.

The Standard We Expect

A well-managed vehicle is:

- Clean and organised
- Safe and roadworthy
- Properly stocked and maintained
- Professionally presented
- Treated with care and respect

Vehicles are not just part of the job. They are part of the business identity.

Looking after them properly ensures smoother workdays, safer operations and a stronger professional image.

8.3 Tools & Equipment Care

INSTRUCTION:

Use this page to clearly explain how tools and equipment should be cared for, maintained and used inside the business.

This applies mainly to field staff (tradies and apprentices), but office staff may also be responsible for shared equipment or resources.

Your message should:

- Explain why tool care matters in a practical, business sense
- Set expectations for ownership, responsibility and respect for equipment
- Cover daily use, storage, maintenance and reporting damage
- Reinforce accountability (lost, damaged or poorly maintained tools)
- Include both individual tools and shared business equipment
- Keep tone simple, practical and responsibility-driven

This section should answer:
"How should I treat and manage tools and equipment here?"

EXAMPLE:

Tools and equipment are the backbone of field work. Without them, nothing gets done.

Every tool, whether it belongs to the business or is assigned to you, must be treated with care, respect and responsibility.

Poor tool care doesn't just cost money. It slows jobs down, creates safety risks and impacts the whole team.

General Expectations

All tools and equipment must be:

- Used correctly and safely
- Kept clean after use
- Stored properly after each job
- Maintained in good working condition
- Checked regularly for damage or wear

If you use it, you are responsible for it while it is in your care.

Field Staff (Tradies & Apprentices)

Field staff are the primary users of tools and equipment.

You are expected to:

- Take responsibility for tools used on each job
- Ensure tools are returned to the correct place after use
- Keep tools organised in vehicles and on-site
- Clean tools after use where required
- Report any damage or faults immediately
- Do not leave tools behind on site or in unsafe locations

Apprentices should be actively learning how to care for tools properly from day one.

Shared Business Tools & Equipment

Some tools and equipment are shared across the business.

For shared items:

- They must be returned in the same condition they were taken
- Any issues must be reported immediately
- They must not be left unaccounted for between jobs
- Responsibility still applies to whoever last used them

Shared tools rely on trust and accountability across the team.

Maintenance & Condition

Good tool care includes ongoing maintenance, not just usage.

Expectations include:

- Keeping tools clean and free from dirt or damage
- Checking batteries, leads and moving parts regularly
- Storing tools in dry, safe and appropriate conditions
- Identifying wear and tear early
- Replacing or reporting faulty equipment before it becomes a problem

A well-maintained tool is safer, faster and more reliable.

Damage, Loss & Reporting

Mistakes happen, but hiding them is not acceptable.

If something is damaged, lost or not working correctly, it must be reported immediately.

Early reporting allows the business to fix issues quickly and avoid delays on jobs.

Office Staff Responsibility

While office staff don't use field tools daily, they are responsible for:

- Managing purchase and replacement requests
- Tracking equipment locations
- Ensuring tools and equipment are properly documented
- Supporting field teams with access to what they need

The Standard We Expect

Good tool and equipment care means:

- Tools are always ready to use
- Nothing is missing or unaccounted for
- Equipment is clean and well maintained
- Issues are reported early
- Responsibility is taken seriously

The Real Impact

When tools are looked after properly:

- Jobs run smoother and faster
- Less downtime and frustration
- Lower costs for the business
- Safer working conditions
- A more professional standard of work

Tools don't just help you do the job. They define how well the job gets done.

8.4 Stock & Materials Handling

INSTRUCTION:

Use this page to clearly explain how stock and materials are handled inside the business.

This is a key operational area that impacts job efficiency, cost control and customer experience.

Your message should:

- Explain how stock and materials are managed day-to-day
- Cover responsibilities for field staff (tradies/apprentices) and office staff
- Set expectations around ordering, usage, storage and tracking
- Reinforce accountability for waste, loss and misuse
- Highlight communication between field and office regarding materials
- Keep tone practical, structured and easy to follow

This section should answer:
"How do we manage stock and materials properly in this business?"

EXAMPLE:

Stock and materials are a critical part of delivering jobs efficiently and profitably. How they are managed directly affects job speed, cost control and customer experience.

Every item used on a job matters, from large fixtures down to small fittings.

General Expectations

Across the business, stock and materials must be:

- Used responsibly and efficiently
- Stored correctly before, during and after jobs
- Accounted for accurately in job records
- Ordered only when needed and approved
- Handled in a way that minimises waste and damage

Nothing should be taken, used or discarded without purpose or record.

Field Staff (Tradies & Apprentices)

Field staff are responsible for the day-to-day handling of materials on-site and in vehicles.

You are expected to:

- Use materials efficiently and avoid unnecessary waste
- Take only what is required for the job
- Store materials safely in vehicles and on-site
- Record additional materials used in Aroflo
- Ensure stock levels are monitored and maintained
- Return unused stock where appropriate
- Communicate with suppliers regarding availability and lead times
- Keep track of fittings and consumables used on each job

Apprentices should be learning how to manage materials responsibly from day one.

Office Staff (Ordering & Control)

Office staff are responsible for ensuring stock and materials are available, tracked and ordered correctly.

You are expected to:

- Ensure stock levels are monitored and maintained
- Track usage and identify trends or waste
- Ensure correct materials are allocated to jobs
- Follow up discrepancies between ordered and used materials

Good office control prevents delays and reduces unnecessary costs.

Vehicles, Storage & Stock Control

Materials are often stored in:

- Vehicles
- Job sites (temporary)
- Office storage areas

In all cases:

- Stock must be kept organised and secure
- Nothing should be left loose or unaccounted for
- Damaged or unusable materials must be reported
- High-value items must be handled with extra care

Ordering Process & Communication

Material ordering is a shared responsibility between field and office, but field staff play a key role in the end-to-end process, from identifying what's needed through to collecting and confirming materials on-site.

Clear communication and proper process here directly impacts job efficiency, cost control and avoiding delays.

Field Staff Responsibilities

Field staff are responsible for managing the practical side of materials on jobs, including ordering and collection where required.

Field staff must:

- Raise purchase orders when materials are required
- Clearly specify what is needed (accurate descriptions, quantities and urgency)
- Order directly with suppliers
- Collect materials from suppliers when needed
- Check and confirm materials received match what was ordered
- Flag any shortages, incorrect items or supplier issues immediately
- Communicate changes in job scope that impact materials as early as possible

Nothing should be assumed. Accuracy at this stage prevents delays later.

Office Staff Responsibilities

Office staff support the process by ensuring visibility, coordination and follow-through.

Office staff must:

- Confirm availability and lead times when required
- Support sourcing of materials when needed
- Monitor purchase orders and ensure they are tracked correctly
- Assist in resolving supplier issues or discrepancies
- Communicate delays or supply issues back to field staff promptly
- Ensure ordering aligns with job requirements and scope

How the Process Works Together

- Field staff identify need → raise PO → order or collect materials
- Office staff support sourcing, tracking and communication
- Both sides ensure what is ordered is what is received and used on the job

Waste, Loss & Accountability

Poor material handling impacts the business directly.

This includes:

- Over-ordering
- Misuse or damage
- Lost or untracked items
- Unrecorded usage

All of these must be avoided.

If something is lost, damaged or incorrect, it must be reported immediately.

The Standard We Expect

Good stock and materials handling means:

- Jobs are not delayed due to missing materials
- Waste is minimised
- Costs are controlled
- Everything used is recorded
- Communication between field and office is clear

The Real Impact

When materials are handled properly:

- Jobs run faster and smoother
- Customers experience fewer delays
- Profitability improves
- The business stays organised and in control

Stock is not just "supplies". It is a direct link between planning, execution and profitability.

8.5 Office Resources

INSTRUCTION:

Use this page to clearly explain the practical office resources used day-to-day, including printing, scanning, stationery and file storage.

This section is focused on making sure office operations stay organised, consistent and efficient.

Your message should:

- Focus on practical office resources (printer/scanner, stationery, supplies, files)
- Clearly explain how and when these resources are used
- Set expectations around ordering, responsibility and organisation
- Reinforce proper file storage habits and naming conventions
- Highlight accountability for keeping shared spaces tidy and stocked
- Keep tone simple, practical and operational

This section should answer:
"How do we manage the physical and digital office resources day-to-day?"

EXAMPLE:

Office resources are the tools and supplies that keep the admin side of the business running smoothly day-to-day.

This includes physical resources like printers and stationery, as well as digital systems for storing and managing files.

Keeping these resources organised and well maintained is essential for efficiency, professionalism and avoiding unnecessary delays.

Printer & Scanner Use

The printer and scanner are shared office tools used for daily operations.

They are used for:

- Printing quotes, invoices and job documents when required
- Scanning signed paperwork and records
- Sending or receiving physical documents digitally
- Supporting job administration and compliance

Expectations:

- Use printing responsibly (avoid unnecessary printing)
- Ensure scanned documents are saved in the correct location
- Check print quality and re-scan if documents are unclear
- Keep the printer area tidy and stocked (paper, ink, etc.)
- Report faults or issues immediately

Printers and scanners are business tools, not personal convenience devices.

Stationery & Office Supplies

Stationery and office supplies include all the everyday consumables that keep the office running smoothly and efficiently.

This covers both regular use items and replenishable stock that needs to be managed in a structured way.

What This Includes

- Paper, pens, folders and notepads
- Printer paper, ink and toner
- Envelopes and mailing supplies
- Desk and general admin supplies
- Any other shared office consumables

Purchasing & Ordering Process

To keep costs controlled and ensure nothing is missed, office supplies are ordered in a structured way rather than ad hoc.

The process is as follows:

- A master list of required stationery and supplies is maintained
- Team members can add items to the list at any time when they notice something is running low
- Before ordering, the office checks in with the wider team to confirm if anything else is needed
- Orders are placed on a **scheduled monthly basis** (unless urgent items are required sooner)
- All purchases must be **reviewed and approved by the manager before ordering**
- Once approved, orders are placed with preferred suppliers
- Delivery is checked against the order to ensure accuracy

This process ensures we avoid over-ordering, under-ordering and unnecessary costs.

Expectations

- Monitor supply levels regularly throughout the month
- Add items to the supply list early, not when they have already run out
- Consolidate needs into the monthly order cycle wherever possible
- Always check with the team before finalising orders
- Ensure manager approval is obtained before any purchase is made
- Store all supplies neatly and in designated storage areas
- Avoid waste, overuse or unnecessary duplication of items
- Keep shared office spaces clean, organised and stocked

Key Principle

We don't order reactively, we plan ahead.

Good supply management means:

- The office never runs out of essentials
- Costs are controlled and predictable
- Everyone has what they need to do their job properly
- Storage areas remain organised and easy to manage

Running out of basic supplies slows the entire office down. Planning ahead keeps everything moving.

File Storage Protocol (Digital & Physical)

All business information must be stored in a structured and consistent way so it can be easily found and used by the team.

Digital File Storage

Digital files must be stored using approved systems such as Microsoft 365 (OneDrive / SharePoint) and other designated platforms.

Expectations include:

- Save files in the correct folder structure
- Use clear and consistent file names
- Avoid creating duplicate or personal storage locations
- Ensure documents are saved in the latest version only
- Keep shared folders clean and up to date

If a file cannot be easily found, the system is not being used correctly.

Physical File Handling

Where physical documents are used:

- They must be stored in clearly labelled folders
- Completed paperwork must be filed or scanned promptly
- No loose documents should be left on desks or shared areas
- Confidential information must be handled securely
- Old or unnecessary paperwork must be archived or disposed of correctly

Responsibility for Office Resources

Everyone in the office is responsible for maintaining shared resources.

This includes:

- Keeping workspaces clean and organised
- Reordering supplies when needed
- Ensuring files are saved correctly
- Reporting broken or missing equipment
- Following agreed storage systems and processes

The Standard We Expect

Good management of office resources means:

- Printers and scanners are used properly and maintained
- Stationery is always available and organised
- Files are easy to find and correctly stored
- Workspaces are tidy and professional
- Nothing is left untracked or disorganised

Office resources may seem simple, but they are essential to keeping the business running efficiently.

When they are managed well, everything else becomes easier, faster and more professional.

8.6 Warehouse Access, Security & Stock Control

INSTRUCTION:

Use this page to clearly explain how the warehouse operates, how access is managed and how stock and materials are controlled within the business.

This page is not about tool care or maintenance. It is specifically focused on warehouse access, security, storage standards and stock control processes.

Your message should:

- Explain the purpose of the warehouse and its role in supporting business operations
- Define who can access the warehouse and how access is managed
- Include information about access codes, security expectations and reporting security concerns
- Set expectations around warehouse conduct and responsibility
- Explain how stock, materials and inventory are stored, tracked and managed
- Clarify responsibilities for returning materials, reporting low stock and maintaining accurate stock control
- Reinforce the importance of warehouse organisation and cleanliness
- Explain why poor stock control, poor security or poor organisation impacts efficiency and profitability
- Keep the tone practical, operational and accountability-focused

This section should answer:

"How do we manage warehouse access, security, storage and stock control in this business?"

EXAMPLE:

The warehouse is a critical part of the business.

It is the central location for stock, materials, equipment storage and operational support. How we manage the warehouse directly impacts efficiency, profitability, security and our ability to serve customers effectively.

Every team member has a responsibility to help keep the warehouse secure, organised and operational.

Warehouse Access

The warehouse is a controlled-access facility.

Access is restricted to authorised team members only.

Upon employment, you will be provided with an access code to enter the warehouse.

If you have not been provided with an access code, please speak with your manager.

Access Rules

- Access codes are not to be shared with anyone
- Visitors are not permitted without approval
- Doors and gates must remain secure when entering and leaving
- Do not allow unauthorised people access to the facility
- Any security concerns must be reported immediately

Your access code is linked to your employment and should be treated as confidential information.

Warehouse Security

The warehouse contains valuable stock, materials, equipment and business assets.

Security is everyone's responsibility.

Security Expectations

- Ensure doors and gates are secured when leaving
- Report suspicious activity immediately
- Report lost keys, access devices or security breaches immediately
- Keep storage areas organised and secure
- Do not remove stock or materials without following the correct process

Poor security creates unnecessary risk for the business and ultimately impacts the entire team.

Stock Control

Effective stock control ensures materials are available when needed and reduces unnecessary costs.

Stock that cannot be found, tracked or accounted for creates delays, frustration and lost profit.

Stock Control Expectations

- Materials must be stored in their designated locations
- Stock movements must be recorded using the approved business process
- Low stock levels should be reported promptly
- Excess materials from jobs should be returned to the warehouse where appropriate
- Do not assume someone else will update stock records

Accurate stock control helps ensure technicians have what they need when they need it.

Storage Standards

A clean and organised warehouse allows everyone to work more efficiently.

Expectations

- Materials should be returned to their designated locations
- Walkways and access areas must remain clear
- Storage areas should be kept clean and organised
- Packaging, rubbish and waste should be disposed of appropriately
- Stock should be stored in a way that makes identification and retrieval easy

An organised warehouse saves time for everyone.

Why This Matters

The warehouse supports every job the business completes.

When warehouse access, security and stock control are managed properly:

- Materials are easier to find
- Jobs are better prepared
- Wasted time is reduced
- Stock losses are minimised
- Security risks are reduced
- The business operates more efficiently

Small actions taken by each team member help create a warehouse that supports the entire business.

This is not just a storage area. It is a critical operational resource that helps keep the business running smoothly every day.

SECTION 9 – Customer Experience Standards

9.1 First Impressions

INSTRUCTION:

Use this page to clearly define what a strong first impression looks like in this business, both over the phone (office staff) and in person (field staff).

This is a critical customer experience moment and sets the tone for the entire job.

Your message should:

- Clearly separate phone-based and in-person first impressions
- Set expectations for tone, language, professionalism and behaviour
- Include both office/admin and field staff responsibilities
- Reinforce that first impressions directly impact customer trust
- Keep tone simple, practical and customer-focused
- Avoid corporate language. Keep it real and relatable

This section should answer:
"What does a great first impression look like in this business?"

EXAMPLE:

First impressions set the tone for everything that follows.

Whether it's a phone call or a knock on the door, customers form an opinion about us within seconds.

That moment matters and everyone in the business plays a role in getting it right.

A strong first impression builds trust, confidence and sets the standard for the entire job experience.

First Impressions - Phone (Office Staff)

The first interaction many customers have is with the office team over the phone.

This is where confidence in the business is either built or lost.

Expectations for office staff:

- Answer calls promptly and professionally
- Speak clearly, calmly and confidently
- Use simple language. Avoid jargon

- Show genuine willingness to help
- Listen carefully before responding
- Confirm details accurately (name, address, job issue, urgency)
- Set clear expectations about next steps

Customers should feel:

- Heard
- Understood
- Confident that their issue is being handled

Tone matters just as much as information.

Even when the office is busy, the customer should never feel rushed or unimportant.

First Impressions - In Person (Field Staff)

For field staff, the first impression happens the moment you arrive on site.

This is often the most important interaction of the job.

Expectations for tradies and apprentices:

- Arrive on time and prepared
- Wear a clean, professional uniform
- Maintain clean appearance (including well-groomed facial hair where applicable)
- Greet the customer politely and confidently
- Introduce yourself and explain your role
- Confirm the job details before starting work
- Be respectful of the customer's home or property

Customers should feel:

- Safe having you on their property
- Confident in your professionalism
- Comfortable asking questions
- Reassured they made the right choice

Body language, tone and attitude matter just as much as technical skill.

Shared Standard Across Office & Field

Whether on the phone or on-site, every interaction should reflect:

- Respect
- Clarity
- Professionalism
- Calm confidence
- A willingness to help

There is no "small" interaction. Every contact shapes the customer's perception of the business.

The Standard We Expect

A great first impression is:

- Professional without being robotic
- Friendly without being unprofessional
- Clear without being complicated
- Confident without being arrogant

First impressions don't just start the job. They define the customer's entire experience.

9.2 Communication During Jobs

INSTRUCTION:

Use this page to clearly define how communication with customers should be handled while a job is in progress.

This is about keeping customers informed, reducing confusion and building trust throughout the job, not just at the start and finish.

Your message should:

- Focus only on customer communication during active jobs
- Include expectations for field staff (tradies/apprentices) and office staff
- Emphasise clarity, timing and professionalism
- Cover updates, delays, changes and progress explanations
- Reinforce simple, non-technical language
- Keep tone practical, calm and customer-focused

This section should answer:
"How do we communicate with customers while the job is happening?"

EXAMPLE:

Good communication during a job is one of the biggest drivers of customer trust and satisfaction.

Customers don't expect everything to go perfectly, but they do expect to be kept informed, spoken to respectfully and never left guessing.

Clear communication throughout the job reduces stress, prevents misunderstandings and builds long-term confidence in our service.

General Expectations

Across all roles, communication during jobs should always be:

- Clear and simple
- Honest and upfront
- Timely (not delayed or left until the end)
- Professional and respectful
- Free from unnecessary jargon or technical language

If something changes, the customer should hear about it early, not after the fact.

Field Staff (Tradies & Apprentices)

Field staff are the main point of communication with the customer during the job.

You are expected to:

- Introduce what will be happening before starting work
- Explain progress in simple terms as the job moves forward
- Inform the customer if anything changes (scope, timing or cost)
- Present options clearly when additional work is required
- Confirm approvals before proceeding with variations where needed
- Keep the customer updated if there are delays or issues
- Remain calm, respectful and professional at all times

Customers should never feel unsure about what is happening on their property.

If there is uncertainty, communicate it early.

Office Staff (Admin Team)

Office staff support communication behind the scenes and directly with customers where required.

You are expected to:

- Relay job updates clearly to customers when needed
- Follow up on quotes, approvals or job changes
- Provide updates regarding scheduling or delays
- Support field staff with information or clarification
- Ensure communication is recorded in the system where appropriate
- Maintain a professional and consistent tone across all customer contact

The office ensures communication is not missed or left incomplete.

Handling Updates, Delays & Changes

Jobs don't always go exactly to plan. When changes happen:

- The customer must be informed as soon as practical
- The reason should be explained clearly and simply
- Options should be provided where possible
- Expectations (time, cost, outcome) should be reset clearly

Silence creates uncertainty. Communication creates trust.

What Good Communication Looks Like

Good communication during a job means:

- The customer always knows what is happening
- There are no surprises at the end of the job
- Changes are explained clearly and early
- The customer feels respected and informed throughout
- Questions are answered without confusion or delay

The Standard We Expect

We communicate in a way that is:

- Simple, not complicated
- Honest, not vague
- Proactive, not reactive
- Calm, even when problems arise
- Consistent across all team members

Communication during the job is not an extra task, it is part of the job.

When it is done well, customers feel confident, informed and looked after from start to finish.

9.3 Handling Complaints

INSTRUCTION:

Use this page to clearly explain how customer complaints should be handled across the business.

This is about professionalism, accountability and turning a negative situation into a positive outcome through clear communication and action.

Your message should:

- Define what counts as a complaint (big or small)
- Explain how both field staff and office staff should respond
- Emphasise calm, respectful and solution-focused behaviour
- Set expectations around speed of response and escalation

- Reinforce ownership (no blaming, no avoidance)
- Keep tone practical, grounded and customer-focused

This section should answer:
"What do I do when a customer is unhappy or raises a complaint?"

EXAMPLE:

Complaints are part of running any service-based business.

They are not something to avoid. They are something to handle properly, calmly and professionally.

How we respond to complaints has a bigger impact on customer trust than almost anything else we do.

A well-handled complaint can actually strengthen the relationship. A poorly handled one does the opposite.

What Counts as a Complaint

A complaint can include:

- The customer is unhappy with the work or outcome
- A misunderstanding about scope, pricing or expectations
- A delay or missed appointment
- A quality or workmanship concern
- Poor communication or customer experience
- Any situation where the customer expresses dissatisfaction

If a customer is unhappy, it is a complaint, regardless of size.

Field Staff (Tradies & Apprentices)

Field staff are often the first to hear about issues on-site.

You are expected to:

- Listen calmly and professionally without becoming defensive
- Acknowledge the customer's concern
- Avoid arguments or emotional responses
- Communicate the issue to the office immediately

- Do not promise outcomes that are not confirmed
- Focus on understanding the problem clearly
- Continue to treat the customer with respect at all times

If something has gone wrong, own the situation and escalate it early.

Office Staff (Admin Team)

Office staff play a key role in resolving complaints quickly and effectively.

You are expected to:

- Respond to complaints promptly and professionally
- Gather all relevant information from field staff and systems
- Communicate clearly with the customer throughout the process
- Offer solutions or next steps as quickly as possible
- Coordinate with field staff to resolve issues
- Ensure outcomes are documented in the system
- Follow through until the complaint is fully resolved

Speed and clarity are critical. Customers should never feel ignored.

How Complaints Should Be Handled

Every complaint should follow a simple process:

1. **Listen and acknowledge**
   Understand the issue without interrupting or defending
2. **Clarify the problem**
   Get clear on what actually went wrong
3. **Communicate internally**
   Field and office align quickly on facts and details
4. **Provide a solution**
   Offer clear next steps and timeframes
5. **Follow through**
   Ensure the issue is fully resolved and confirmed

What NOT to Do

- Do not argue with the customer
- Do not ignore or delay communication
- Do not blame other team members or systems
- Do not make promises without confirmation
- Do not leave the issue unresolved or "park it"

The Standard We Expect

A well-handled complaint looks like:

- The customer feels heard and respected
- The issue is acknowledged quickly
- A clear solution is provided
- Communication is consistent throughout
- The matter is fully resolved and documented

Key Principle

A complaint is not a problem to hide. It is an opportunity to fix, improve and build trust.

How we respond defines how customers remember us.

9.4 Leaving a Job Site Properly

INSTRUCTION:

Use this page to clearly define what "leaving a job site properly" means in the business.

This is a key part of customer experience and reflects professionalism, pride and attention to detail.

Your message should:

- Clearly outline expectations for finishing and leaving a job site
- Include responsibilities for field staff (tradies and apprentices)
- Reinforce cleanliness, safety and respect for the customer's property
- Cover documentation and system updates before leaving
- Emphasise that the job is not complete until the site is properly left
- Keep tone practical, simple and standards-focused

This section should answer:
"What does it look like to properly finish and leave a job?"

EXAMPLE:

How we leave a job site is just as important as the work we do while we're there.

A job is not considered complete until the site is clean, safe and the customer is left with a clear understanding of what has been done.

This is often the final impression a customer has of us and it needs to reflect professionalism and pride in our work.

Field Staff (Tradies & Apprentices)

Field staff are responsible for ensuring the job site is properly closed out before leaving.

You are expected to:

- Complete all agreed work to standard
- Clean and tidy the work area thoroughly
- Remove all rubbish, offcuts and debris
- Ensure tools and equipment are packed away safely
- Restore the area as close as possible to how it was found
- Walk the customer through what has been completed
- Confirm the customer is satisfied before leaving
- Ensure invoicing and payment is completed on-site
- Update job notes, photos and documentation in Aroflo

If the site is not clean, tidy and complete, the job is not finished.

Apprentice Responsibilities

Apprentices play a key role in site clean-up and job completion.

You are expected to:

- Assist with cleaning and packing up the site
- Ensure tools and materials are organised and accounted for
- Support the tradie in final job checks
- Help maintain a professional presentation before leaving
- Learn what a "finished job" looks like in practice

Attention to detail matters here. This is where professionalism is built.

Customer Handover

Before leaving, the customer should always:

- Understand what work has been completed
- Know if anything still needs follow-up (if applicable)
- Have had any questions answered clearly
- Feel confident in the result

This final interaction should be calm, clear and professional.

Office Staff (Post-Job Completion)

Once the field team has left the site, the office ensures the job is properly closed out.

Office responsibilities:

- Confirm job notes and documentation are complete
- Ensure invoicing has been processed correctly
- Follow up any missing information or photos
- Close the job in the system once fully complete
- Address any follow-up actions or customer feedback

The job is not fully complete until it is closed properly in the system.

The Standard We Expect

A properly finished job looks like:

- The site is clean and tidy
- The customer is informed and satisfied
- All work is completed to standard
- Documentation is fully updated
- Nothing is left behind or incomplete

We don't just finish jobs, we finish them properly.

How we leave a site is what customers remember most.

SECTION 10 – Safety, Risk & Responsibility

10.1 Safety Expectations (Non-Negotiables)

INSTRUCTION:

Use this page to clearly define the absolute safety expectations that apply to everyone in the business.

These are non-negotiable rules that must always be followed on every job, every time.

Your message should:

- Clearly outline core safety rules that apply to all staff
- Emphasise that safety overrides speed, convenience or pressure
- Apply to both field staff (tradies/apprentices) and office awareness where relevant
- Reinforce personal responsibility and accountability
- Keep tone firm, clear and practical (no over-complication)
- Make it clear that safety is a daily behaviour, not a once-off training topic

This section should answer:
"What are the safety rules I must never ignore?"

EXAMPLE:

Safety is not optional in this business.

It is not something we "try to do when we can". It is a non-negotiable part of how we work every day.

No job is ever more important than your safety, your team's safety or the safety of the customer and their property.

If something is unsafe, we stop, reassess and fix it before continuing.

Core Safety Rules - Always Apply

These rules apply at all times, on every job:

- Never take shortcuts that compromise safety
- Never work in unsafe conditions without addressing the risk first
- Always wear required PPE (Personal Protective Equipment)

- Always follow safe work procedures and instructions
- Always use tools and equipment correctly and as intended
- Always maintain awareness of surroundings on-site
- Always secure work areas to protect customers and the public
- Never proceed if you are unsure how to complete a task safely

If you are unsure, stop and ask. Guessing is not acceptable.

Field Staff (Tradies & Apprentices)

Field staff carry the highest level of day-to-day safety responsibility.

You are expected to:

- Assess the site before starting any work and complete an On-Site Risk Assessment
- Identify hazards before they become a problem
- Use correct PPE at all times without exception
- Follow SWMS and safe work procedures for all relevant tasks
- Communicate hazards or concerns immediately
- Stop work if something is unsafe
- Ensure apprentices are working safely and correctly supervised

Speed & profit never come before safety.

Apprentice Safety Expectations

Apprentices are required to:

- Follow all instructions and safety procedures exactly
- Ask questions if unsure about any task or process
- Never attempt work beyond their skill level unsupervised
- Wear PPE at all times
- Report hazards immediately to the tradesperson or office

Safety is part of learning. Not something separate from it.

Office Staff Awareness (Admin Team)

While office staff are not physically on-site, they play a role in supporting safety.

You are expected to:

- Ensure job information includes any known safety risks
- Every job has an On-Site Risk Assessment completed, prior to the tradesman starting work
- Support communication of safety requirements to field staff
- Respect that field teams may need time to resolve safety concerns before responding to scheduling pressure
- Escalate any safety-related concerns appropriately

Safety decisions made in the field must always be supported by the office.

Non-Negotiable Safety Behaviour

The following will never be acceptable:

- Working in unsafe conditions without addressing the risk
- Ignoring PPE requirements
- Rushing work at the expense of safety
- Continuing work when a hazard has been identified and not controlled
- Allowing others to work unsafely without intervention
- Hiding or failing to report safety concerns

The Standard We Expect

A safe workplace looks like:

- Hazards are identified early and managed properly
- PPE is worn correctly at all times
- Safe work procedures are followed without exception
- Team members look out for each other
- Work is paused when safety is in question

Nothing we do is urgent enough to be unsafe.

Safety always comes first. Every job. Every time. No exceptions.

10.2 Identifying & Reporting Risks

INSTRUCTION:

Use this page to clearly explain how risks are identified, assessed and reported in the business before and during work.

This is a core safety process that applies to all field staff (tradies and apprentices), with office staff supporting where required.

Your message should:

- Explain what a "risk" is in practical, real-world job terms
- Clearly include the requirement for on-site risk assessments before starting work
- Set expectations for identifying hazards before and during work
- Explain how and when risks must be reported
- Reinforce early action, not waiting until something becomes a problem
- Keep tone practical, clear and responsibility-focused

This section should answer:
"How do I identify risks and what do I do when I find one?"

EXAMPLE:

Every job site comes with risks.

Some are obvious, some are not. Our responsibility is to identify them early, assess them properly and take action before work begins and throughout the job.

Safety is not just about reacting to danger. It is about actively looking for it and controlling it before it becomes a problem.

What is a Risk?

A risk is anything on-site that could cause:

- Injury or harm
- Damage to property
- Unsafe working conditions
- Delays or disruption to work
- Unsafe interaction with customers, public or environment

If something doesn't feel right, it needs to be checked.

On-Site Risk Assessments (Mandatory Before Work Begins)

Before any work starts on-site, a risk assessment must be completed.

This is not optional.

Field staff are expected to:

- Inspect the site before starting work
- Identify any visible hazards or risks
- Consider the environment, access and work conditions
- Determine what controls are needed to make the job safe
- Ensure appropriate PPE and procedures are in place
- Confirm it is safe to proceed before beginning work

If the site is not safe, work does not start until it is made safe.

Field Staff (Tradies & Apprentices)

Field staff are responsible for identifying and managing risks in real time.

You are expected to:

- Continuously assess risks throughout the job, not just at the start
- Stop work immediately if a new risk is identified
- Communicate hazards clearly to the team and office
- Ensure apprentices are aware of and protected from risks
- Follow safe work procedures and SWMS at all times
- Never ignore or work around a known hazard

If in doubt, stop and reassess.

Apprentice Responsibilities

Apprentices are expected to:

- Be aware of their surroundings at all times
- Speak up if they notice something unsafe
- Follow instructions related to risk control
- Never proceed with work they are unsure is safe
- Report concerns immediately to their supervisor

Safety awareness is part of learning the trade properly.

Reporting Risks

Risks must be communicated clearly and immediately.

This includes:

- Reporting hazards to the supervising tradesperson
- Escalating issues to the office when required
- Recording relevant details in job notes or systems (Aroflo)
- Ensuring all relevant team members are aware of the risk

Do not assume someone else will report it.

If you see it, you are responsible for raising it.

Office Staff (Support Role)

Office staff support risk management by:

- Recording and communicating known site risks to field teams
- Ensuring relevant job information includes safety details
- Supporting escalation of safety concerns when required
- Ensuring risk-related communication is clear and documented
- Avoiding scheduling pressure that overrides safety decisions

The office ensures field teams have the information they need to work safely.

Non-Negotiables

- Every site must be assessed before work begins
- Work does not start if risks are not controlled
- Risks must be reported immediately, not delayed
- No one should ignore or work through unsafe conditions
- Everyone has responsibility for identifying risks

The Standard We Expect

A safe, well-managed job looks like:

- Risks are identified before work starts
- Controls are in place before work begins
- Hazards are communicated clearly
- Risks are monitored throughout the job
- Everyone feels confident speaking up

We don't wait for problems to happen. We identify them early and deal with them properly.

Safety starts with awareness, action and communication on every job.

10.3 Incident Process

INSTRUCTION:

Use this page to clearly explain what happens when an incident occurs on-site or during work and how it must be reported and managed.

This is about transparency, accountability and ensuring the right steps are followed immediately after anything goes wrong.

Your message should:

- Define what an "incident" is in practical terms
- Explain immediate actions required after an incident occurs
- Set expectations for field staff (tradies/apprentices) and office staff
- Emphasise reporting speed and accuracy
- Reinforce that incidents are not hidden or delayed
- Include basic escalation and documentation expectations
- Keep tone calm, structured and responsibility-focused

This section should answer:
"What do I do immediately after an incident happens?"

EXAMPLE:

An incident is anything unexpected that results in injury, damage, near miss or unsafe outcome on-site or during work activities.

Incidents must always be taken seriously, no matter how small they may seem at the time.

What matters most is how quickly and correctly we respond.

What Counts as an Incident

An incident includes (but is not limited to):

- Injury to any team member or customer
- Damage to property or equipment
- Near misses (where harm could have occurred)
- Unsafe events or uncontrolled hazards
- Vehicle or tool-related accidents
- Any situation requiring emergency response or intervention

If you are unsure whether something is an incident, treat it as one and report it.

Immediate Actions (First Response)

If an incident occurs:

Field staff must:

- Stop work immediately
- Ensure the area is safe and no further harm can occur
- Check for injuries and provide basic assistance if required
- Notify the office as soon as possible
- Do not continue work until the situation has been assessed
- Secure tools, equipment or the site if needed

Safety and wellbeing always come first.

Field Staff Responsibilities

Field staff are the first responders on-site.

You are expected to:

- Stay calm and assess the situation clearly
- Prioritise safety of people over work or equipment
- Report the incident immediately to the office
- Provide clear and factual information about what happened
- Take photos or documentation where appropriate and safe to do so
- Cooperate fully with any follow-up investigation

Do not delay reporting or try to manage incidents alone.

Please see additional, detailed steps for specific incidents

- Personal Injury or Near Miss
- Vehicle Accident or Damage
- Theft

Apprentice Responsibilities

Apprentices must:

- Immediately alert their supervising tradesperson
- Follow instructions without interfering with the situation
- Stay clear of any unsafe areas
- Support safety actions if directed
- Report anything they observe clearly and honestly

Office Staff (Support & Response)

Office staff are responsible for coordinating the response once an incident is reported.

You are expected to:

- Record the incident promptly in the system
- Communicate with relevant team members immediately
- Support field staff with next steps and guidance
- Notify management where required
- Ensure documentation is completed accurately
- Assist with customer communication if needed
- Coordinate any follow-up actions or reporting requirements

Speed and clarity are critical in this stage.

Reporting Requirements

All incidents must be:

- Reported immediately (not at the end of the day or later)
- Documented clearly with accurate details
- Supported with photos or evidence where appropriate
- Logged in the appropriate system (Aroflo or designated reporting process)
- Followed up until fully resolved

There are no exceptions to reporting requirements.

Non-Negotiables

- No incident is too small to report
- Nothing is to be hidden or delayed
- Work must stop if safety is compromised
- All facts must be reported honestly and clearly
- Everyone involved must cooperate fully

The Standard We Expect

A properly managed incident looks like:

- Immediate response and hazard control
- Clear communication to the office
- Accurate and timely reporting
- Proper documentation completed
- Follow-up actions completed and closed out

We don't ignore incidents. We deal with them immediately, honestly and professionally.

How we respond defines our safety culture and our standards as a business.

10.4 Looking After Yourself & Your Team

INSTRUCTION:

Use this page to clearly explain the responsibility each team member has in looking after their own wellbeing and the safety and wellbeing of others.

This is about culture, awareness and responsibility, not just physical safety.

Your message should:

- Emphasise personal responsibility for health, wellbeing and safe behaviour
- Include both physical and mental wellbeing considerations
- Reinforce looking out for teammates (tradies, apprentices and office staff awareness)
- Encourage speaking up early when something doesn't feel right
- Keep tone supportive, grounded and practical (not overly emotional or corporate)
- Apply to both field and office environments

This section should answer:
"What does it mean to look after myself and my team here?"

EXAMPLE:

Looking after yourself and your team is a core part of how we work.

Safety is not just about equipment, procedures or rules. It's also about awareness, energy and making sure everyone gets home safely at the end of the day.

This responsibility sits with every single person in the business.

Looking After Yourself

Every team member is responsible for their own wellbeing.

This includes:

- Working safely and within your ability
- Knowing when to slow down and reassess
- Speaking up if you are tired, unwell or not fit for work
- Taking breaks when needed
- Not pushing through unsafe fatigue or stress
- Using correct technique and tools to avoid strain or injury

You cannot do your job properly if you are not looking after yourself first.

Looking Out for Your Team

We work as a team and that means we look out for each other.

You are expected to:

- Watch for signs that someone may be struggling physically or mentally
- Speak up if you notice unsafe behaviour or conditions
- Offer help when a teammate needs support on-site
- Step in if something is being done unsafely
- Encourage apprentices and less experienced staff to work safely
- Treat everyone with respect and awareness at all times

No one should be working alone in unsafe conditions, physically or otherwise.

Field Staff Responsibility (Tradies & Apprentices)

On-site, team awareness is critical.

Field staff must:

- Communicate clearly with each other during tasks
- Support apprentices with safe work practices
- Avoid rushing work at the expense of safety or quality
- Call out risks or unsafe behaviour immediately
- Make sure everyone is accounted for on-site

A strong site team looks after each other without hesitation.

Apprentice Responsibility

Apprentices are expected to:

- Ask for help when unsure
- Speak up if something doesn't feel safe
- Never feel pressured to work beyond their ability
- Pay attention to experienced team members and learn safe practices
- Support the team by staying aware and engaged

Asking questions is part of working safely, not a weakness.

Office Staff Awareness (Admin Team)

Office staff also play a role in team wellbeing.

You are expected to:

- Be aware of workload pressure on field teams
- Communicate clearly and realistically about job expectations
- Support a culture where safety and wellbeing are prioritised over speed
- Encourage open communication when issues arise
- Avoid creating unnecessary urgency that impacts safety or wellbeing

Speaking Up Early

One of the most important parts of looking after yourself and your team is speaking up early.

If something doesn't feel right:

- Say something
- Don't wait for it to become a bigger issue
- Don't assume someone else will raise it
- Don't ignore discomfort, fatigue or unsafe conditions

Early communication prevents bigger problems later.

The Standard We Expect

A strong team environment looks like:

- People working safely and responsibly
- Team members supporting each other naturally
- Open communication without hesitation
- Awareness of both physical and mental wellbeing
- No one feeling isolated or unsupported

We don't just work together. We look after each other.

A strong team is one where everyone goes home safe, supported and respected at the end of the day.

10.5 Safe Work Method Statements (SWMS)

INSTRUCTION:

Use this page to clearly explain Safe Work Method Statements (SWMS) and how they apply to all field staff.

This section is specifically for tradesmen and apprentices and is a core compliance and safety requirement before starting certain types of work.

Your message should:

- Clearly explain what SWMS is in simple terms
- Define when and why SWMS must be used
- Set expectations for both tradesmen and apprentices
- Reinforce that SWMS must be understood before work begins
- Emphasise practical application, not just paperwork compliance
- Include accountability for following documented safe methods
- Keep tone clear, direct and no-nonsense

This section should answer:
"What is SWMS and what is expected of me on-site?"

EXAMPLE:

Safe Work Method Statements (SWMS) are a key part of how we manage safety on-site.

They are not just paperwork. They are a clear guide that explains how to complete higher-risk work safely, step by step.

If a SWMS is required, it must be understood and followed before any work begins.

What is SWMS?

A SWMS is a document that:

- Breaks down high-risk work tasks
- Identifies potential hazards
- Outlines control measures to reduce risk
- Provides a safe method for completing the work

In simple terms, it explains how to do the job safely.

When SWMS Must Be Used

SWMS must be used before starting any work, including (but not limited to):

- Use of hand tools
- Work at heights
- Electrical or live systems
- Excavation or trenching
- Confined spaces
- Working in hot conditions
- Any task identified as high-risk on-site or in planning

If a SWMS is required for the job, it must be in place before work starts. No exceptions.

Tradesmen Responsibilities

Tradesmen are responsible for leading SWMS compliance on-site.

You are expected to:

- Review the SWMS before starting any relevant work
- Ensure all hazards and control measures are understood
- Explain SWMS requirements to apprentices and team members
- Follow the SWMS exactly during the job
- Stop work if conditions change and SWMS is no longer valid
- Ensure compliance is maintained throughout the task

You are accountable for how SWMS is applied on-site.

Apprentice Responsibilities

Apprentices are required to actively participate in SWMS compliance.

You are expected to:

- Read and understand the SWMS before work begins
- Ask questions if anything is unclear
- Follow all instructions provided by the tradesman
- Never perform high-risk tasks outside of SWMS guidelines

- Speak up if something on-site does not match the SWMS
- Treat SWMS as part of learning safe trade practices

If you don't understand it. You don't start the work.

On-Site Expectation

Before any SWMS-related work begins:

- The document must be available and reviewed
- The team must confirm understanding
- Hazards and controls must be clear to everyone involved
- Work must not proceed until it is safe to do so

During work:

- SWMS must be followed at all times
- Any changes in conditions must be reassessed
- Work must stop if safety is compromised

Non-Negotiables

- No SWMS = no work starts
- SWMS must be understood, not just signed
- Work must follow the documented method
- Changes in conditions require reassessment
- Ignoring SWMS is a serious breach of safety expectations

The Standard We Expect

A properly managed SWMS process looks like:

- Document reviewed before work begins
- Hazards clearly understood by the team
- Safe work steps followed on-site
- Ongoing awareness of changing conditions
- Full compliance from both tradesmen and apprentices

SWMS is not paperwork. It is how we make sure everyone goes home safe.

If we don't follow it properly, we are not working safely.

SECTION 11 – Money, Jobs & Performance

11.1 How The Business Makes Money

INSTRUCTION:

Use this page to give a simple, high-level explanation of how the business makes money.

This is not a detailed financial breakdown. It's about helping the team understand the core drivers of revenue and why certain behaviours matter day-to-day.

This page should:

- Keep the explanation simple and easy to understand
- Introduce the key revenue drivers: quoting, upselling and repeat customers
- Avoid deep financial detail (those topics are covered in later pages)
- Help both field and office staff understand how their actions impact business performance
- Reinforce that good service and good communication directly link to business success
- Keep tone practical, grounded and non-technical

This section should answer:
"How does this business actually make money?"

EXAMPLE:

At its simplest, this business makes money by completing quality work for customers in a way that is efficient, professional and well communicated.

But there are a few key drivers that make a big difference to how successful we are as a team and as a business.

Understanding these helps everyone make better decisions in their day-to-day work.

Quoting Work

Not all work starts as a booked job. A lot of it comes from quoting.

Quoting is important because it:

- Turns enquiries into paid work
- Ensures the business is charging correctly for time, labour and materials
- Allows us to plan and schedule work properly
- Helps maintain profitability and sustainability

Good quoting is not just about price. It's about clear communication, accuracy and setting the right expectations with customers.

Upselling & Identifying Additional Work

While on-site, there are often opportunities to identify additional work or better solutions for the customer.

This matters because it:

- Helps solve problems properly the first time
- Improves customer outcomes and experience
- Increases job value where appropriate and justified
- Reduces repeat call-backs or unfinished work

Upselling is not about pushing unnecessary work. It's about identifying real solutions that benefit the customer.

Repeat Customers

A large part of business success comes from customers who use us again or refer us to others.

Repeat customers matter because they:

- Trust the quality of our work and service
- Reduce the need for constant new customer acquisition
- Create long-term, stable business growth
- Are built through consistent positive experiences

Every interaction on-site or over the phone plays a role in whether a customer comes back again.

How It All Connects

Quoting, upselling and repeat customers all work together to keep the business strong.

- Quoting brings in the work
- Upselling improves job value and outcomes
- Repeat customers create long-term stability

Every role in the business influences these areas, whether on the phone, on-site or behind the scenes.

We don't just complete jobs. We create value through how we quote, how we work and how we treat customers.

That's what keeps the business growing and stable over time.

11.2 Importance of Quoting Accurately

INSTRUCTION:

Use this page to clearly explain why accurate quoting is essential to the success of the business.

This is not a technical quoting guide. It's about mindset, responsibility and understanding the impact of quoting on profitability and overall business performance.

This page should:

- Explain why accurate quoting is critical to business profitability
- Reinforce that business success supports job security, growth and opportunity for the whole team
- Highlight the link between quoting quality, margins and sustainable growth
- Keep the message simple, practical and easy for both field and office staff to understand
- Emphasise accountability and care when preparing quotes
- Include a reference link to the detailed quoting guide

This section should answer:
"Why does quoting accurately matter so much?"

EXAMPLE:

Accurate quoting is one of the most important parts of how this business operates.

It directly impacts profitability, customer experience and the long-term success of the company.

When quoting is done properly, the business runs smoothly. When it isn't, everything becomes harder, from scheduling and delivery through to financial performance.

Why Accuracy Matters

A quote is not just a price. It is a commitment to the customer and a plan for how the job will be delivered.

Accurate quoting ensures:

- The job is priced correctly for time, labour and materials
- The business can operate profitably and sustainably
- Customers receive fair and transparent pricing

- There are fewer surprises, variations or disputes later in the job
- Work can be scheduled and delivered efficiently

Small quoting errors can have a big impact when repeated across multiple jobs.

Impact on the Business

Quoting accuracy directly affects how strong the business is.

When quotes are accurate:

- Jobs are profitable
- Cash flow is stable
- The team has consistent work
- Investment in tools, training and growth becomes possible
- The business remains healthy and sustainable

When quotes are inaccurate:

- Margins are reduced
- Time is lost on unprofitable work
- Pressure increases on the team
- Business growth is affected

Put simply, strong quoting keeps the business strong.

Why This Matters to You

The success of the business affects everyone.

When the business is performing well:

- There is more work stability
- There are better resources and equipment
- There are more opportunities for growth and development
- The team can continue to build a strong, reliable workplace

We all benefit when the business is profitable and well managed.

Care & Responsibility in Quoting

Quoting must always be done with:

- Attention to detail
- Clear understanding of the scope of work
- Accurate pricing of labour and materials
- Honest assessment of what is required to complete the job properly

Rushed or careless quoting creates problems later for both the customer and the team.

For a detailed step-by-step guide on how to prepare accurate quotes and estimates, refer to:

- **Prepare a detailed quote/estimate** — step-by-step guide and additional quoting resources to ensure you are quoting accurately.

We don't just send quotes. We set the foundation for how the job will run, how the customer experience will feel and how successful the business will be.

Accuracy here matters more than anything.

11.3 The Importance of Upselling

INSTRUCTION:

Use this page to clearly explain why upselling is an important and expected part of how we operate.

This is not about "selling for the sake of selling". It is about identifying real issues, educating customers and providing solutions that genuinely improve safety, performance and long-term value.

This page should:

- Clearly explain what upselling means in this business (value-based, not pushy sales)
- Introduce the upselling techniques used and their role in identifying opportunities
- Explain how this improves customer outcomes and prevents future issues
- Reinforce professionalism, trust and clarity in customer communication
- Highlight benefits to both the customer and the business (including profitability)
- Keep tone practical, confident and customer-focused

This section should answer:
"Why is upselling part of our process and how do we do it properly?"

EXAMPLE:

Upselling in this business is not about pressure or pushing unnecessary work.

It is about identifying real issues, educating the customer and offering solutions that improve safety, prevent future problems and save money in the long run.

When done properly, upselling improves the customer experience, increases trust and ensures we are doing the job fully, not just partially.

Plumbing & Safety Inspection Report

At every home, we complete a Plumbing & Safety Inspection Report as part of our standard service.

This is a structured on-site assessment designed to identify hazards, maintenance issues and opportunities for preventative work.

It allows us to give customers a clear understanding of the condition of their plumbing system, beyond just the immediate job they called us for.

Why It Matters to the Customer

The Plumbing & Safety Inspection Report:

- Identifies hidden or developing plumbing issues early
- Helps prevent expensive emergency call-outs
- Allows preventative maintenance to be completed immediately where appropriate
- Provides clarity and education about their home plumbing system
- Supports better long-term planning for repairs and upgrades

It shifts the customer experience from reactive repairs to proactive care.

Why It Matters to the Business (Profitability & Sustainability)

The Plumbing & Safety Inspection Report is also a key driver of business performance.

It helps the business by:

- Increasing average job value (average dollar sale) through identified additional work opportunities
- Turning a simple service call into multiple completed tasks in one visit
- Reducing wasted travel time through more efficient job completion
- Improving overall job profitability by capturing work already present on-site
- Creating consistent, repeatable opportunities for additional revenue

It also strengthens long-term business growth by:

- Building a detailed customer database for future marketing and follow-ups
- Allowing targeted maintenance reminders (e.g. filter changes, hot water system checks, etc.)
- Increasing repeat business through preventative service cycles

In simple terms, it helps the business stay profitable, stable and growing, which benefits everyone in the team.

The CLOSE (How We Present Recommendations)

Once the Plumbing & Safety Inspection Report is completed, we use a structured method called **The CLOSE** to present recommended work to the customer.

The CLOSE is a communication tool that turns technical findings into simple, clear and confident customer decisions.

It brings together:

- What was found during the inspection
- What work is recommended
- Fixed upfront pricing
- Immediate savings if completed today
- Membership savings where applicable

What The CLOSE Does

The CLOSE presents information in a clear, side-by-side format that shows:

- The issue identified
- The recommended solution
- The fixed price from our pricing system
- The savings for completing work immediately
- Additional savings through membership options

This removes confusion and makes decision-making easy for the customer.

Why The CLOSE Works

Customers respond well to The CLOSE because it:

- Builds trust through transparency and visible pricing
- Removes uncertainty and confusion around cost and options
- Helps customers understand the value of completing work now
- Positions the tradesperson as a trusted advisor, not a salesperson
- Makes decisions quicker and more confident

It feels clear, fair and professional.

Why The CLOSE Matters to the Business (Profitability & Performance)

The CLOSE is one of the most important drivers of business profitability.

It helps the business by:

- Increasing approval rates on recommended work
- Converting identified issues into completed, billable jobs
- Increasing average job value in a structured and consistent way
- Reducing missed revenue opportunities on-site
- Supporting efficient, same-visit job completion rather than repeat visits

It also improves overall business performance by:

- Creating consistency in how recommendations are presented
- Reducing reliance on individual "sales ability" and standardising outcomes
- Improving forecasting and revenue stability across the business

In short, The CLOSE ensures that identified work doesn't get lost. It gets clearly communicated, approved and completed.

We don't sell work. We identify it, explain it clearly and present it properly.

When we do this well:

- Customers get better outcomes
- The business remains profitable and sustainable
- The team benefits from stable, consistent work
- Everyone wins from doing things properly, not partially

Upselling done the right way is not selling. It's structured, professional communication that improves outcomes for everyone.

11.4 The Importance of Repeat Customers

INSTRUCTION:

Use this page to clearly explain why repeat customers are one of the most valuable parts of the business.

This is not about customer service detail. It is about understanding the long-term value of trust, relationships and ongoing work.

This page should:

- Explain what makes repeat customers so valuable to the business
- Highlight the financial impact (higher spend, lower marketing cost, better efficiency)
- Reinforce the role every team member plays in creating repeat business
- Keep explanation simple, practical and easy to understand
- Link repeat customers directly to business profitability and stability
- Keep tone grounded, confident and non-salesy

This section should answer:
"Why are repeat customers so important to the business?"

EXAMPLE:

Repeat customers are one of the most valuable parts of this business.

They are not just "extra work". They are the foundation of a stable, profitable and sustainable business.

When a customer trusts us and continues to use our services, everything becomes more efficient, more predictable and more profitable.

Why Repeat Customers Matter

Repeat customers are important because:

- They already know and trust our service
- They require less explanation and less time to convert into work
- They are more likely to approve recommendations and additional work
- They provide ongoing, long-term opportunities for maintenance and upgrades
- They often refer friends, family and neighbours

Trust is already built, which makes everything easier.

Financial Impact on the Business

Repeat customers have a direct impact on profitability.

On average:

- Repeat customers spend **around 3x more** over time compared to new customers
- This is because trust is already established, leading to higher acceptance of recommendations and ongoing work

In addition:

- The cost to win repeat work is significantly lower than acquiring new customers
- Less time and money is spent on marketing and advertising
- Jobs are more efficient due to known customer history and expectations

Put simply, repeat customers cost less to serve and generate more revenue over time.

Reduced Marketing Pressure

A strong base of repeat customers means:

- Less reliance on expensive marketing to find new customers
- More predictable job flow from existing relationships
- Better return on every customer interaction

Instead of constantly replacing customers, the focus becomes building long-term relationships that continue to generate work.

This creates a more stable and efficient business model.

How Repeat Customers Are Created

Repeat customers are not accidental. They are created through:

- Strong first impressions
- Clear communication during jobs
- Professional, high-quality workmanship
- Honest recommendations and quoting
- Clean, respectful job site behaviour
- Great overall customer experience

Every interaction either builds or reduces the chance of a customer returning.

Why This Matters to You

Every role in the business contributes to repeat customers:

- **Field staff** create trust through on-site experience and workmanship
- **Office staff** build trust through communication and follow-up
- **Apprentices** contribute through attitude, learning and professionalism
- **Everyone** contributes to the overall customer experience

One good job creates opportunity for many more.

Repeat customers are the most efficient source of revenue in the business.

They spend more, cost less to maintain and create long-term stability for the entire team.

When we take care of customers properly, they take care of the business in return.

11.5 Why Efficiency Matters

INSTRUCTION:

Use this page to clearly explain why efficiency is important across both field and office operations.

This is not about rushing work. It is about working in a smart, structured and consistent way that improves outcomes for customers and the business.

This page should:

- Define what efficiency means in this business (quality + speed + structure)
- Explain why inefficient work impacts profitability, customer experience and workload
- Apply to both field staff (tradies/apprentices) and office staff
- Reinforce that efficiency supports better scheduling, fewer delays and higher job satisfaction
- Keep tone practical, grounded and non-technical
- Link efficiency directly to business performance and team success

This section should answer:
"Why does working efficiently actually matter?"

EXAMPLE:

Efficiency is about doing the job in the right way, in the right time, with the right outcome. Not about rushing or cutting corners.

In this business, efficiency means:

- High-quality work
- Clear communication
- Proper preparation
- Minimal wasted time and effort
- Smooth job flow from start to finish

When we are efficient, everything works better, for the customer, the team and the business.

A Key Reality About Efficiency and Profit

Just because a job has been quoted to make a profit does not mean that outcome is guaranteed.

Profit is only realised when the job is delivered efficiently.

Time is generally the biggest profit killer in a trade business and it needs to be actively managed on every job.

Delays, rework, poor preparation and unnecessary time on site all erode margin quickly, even on well-priced work. This is why efficiency is not optional. It is essential to protecting profitability.

Why Efficiency Matters to the Business

Efficiency has a direct impact on profitability and performance.

When work is efficient:

- More jobs can be completed in a day
- Less time is wasted on delays, rework or confusion
- Travel, materials and labour are used more effectively
- Jobs are more likely to be completed correctly the first time
- Overall business costs are reduced

When inefficiency happens:

- Jobs take longer than they should
- Scheduling becomes harder to manage
- Profit margins are reduced
- Customers experience delays or frustration
- The team carries unnecessary pressure

Efficiency keeps the business stable, profitable and scalable.

Why Efficiency Matters to Customers

Customers don't just value the work. They value how smoothly the experience runs.

Efficient service means:

- Faster response and completion times
- Clear expectations from start to finish
- Less disruption to their home or routine
- Fewer return visits or delays
- A smoother, more professional experience overall

When we are efficient, customers feel like everything is under control.

Field Staff (Tradies & Apprentices)

In the field, efficiency is about working smart without sacrificing quality.

You are expected to:

- Arrive prepared with the right tools and materials
- Complete work in a logical, organised sequence
- Minimise wasted time through planning and communication
- Avoid rework by doing things properly the first time
- Keep job sites organised to improve workflow
- Communicate clearly with the office and customer

Efficiency on-site comes from preparation, experience and discipline.

Office Staff (Admin Team)

In the office, efficiency is about keeping everything flowing smoothly behind the scenes.

You are expected to:

- Schedule jobs clearly and realistically
- Ensure information is accurate and complete before jobs are sent out
- Minimise delays in communication between customers and field staff
- Follow up quotes, approvals and job progress promptly
- Reduce back-and-forth by providing clear instructions upfront

Efficient administration keeps the field team productive and on track.

What Efficiency Is NOT

Efficiency does NOT mean:

- Rushing jobs and reducing quality
- Cutting corners to save time
- Skipping safety or proper procedures
- Ignoring customer communication
- Sacrificing standards for speed

Speed without quality is not efficiency. It creates more problems.

The Standard We Expect

Efficient work looks like:

- Jobs completed correctly the first time
- Clear communication between all team members
- Minimal wasted time or confusion
- Smooth transitions between job stages
- Customers experiencing a professional, organised service

Efficiency is not about doing things faster. It is about doing things better, smarter and more consistently.

When we are efficient:

- Customers are happier
- The team is less stressed
- The business is more profitable
- Everyone wins

11.6 Individual Performance Expectations

INSTRUCTION:

Use this page to clearly explain how individual performance is measured within the business.

This is an onboarding-level introduction to expectations. Not an advanced management dashboard explanation.

This page should:

- Explain how performance is measured in simple, practical terms
- Introduce Targets and Incentives in a clear way
- Make it relevant to field staff (tradies and apprentices)
- Reinforce that performance impacts both personal growth and business success
- Avoid overcomplicating. Focus on understanding, not deep analysis
- Keep tone supportive, direct and easy to understand for new starters

This section should answer:
"How is my performance measured and why does it matter?"

EXAMPLE:

As a new team member, it's important to understand how your performance is measured and what "doing a good job" actually looks like in real terms.

We don't just look at whether the work is completed. We look at how efficiently it is done, how well it is communicated and what value it delivers to the business.

There are 2 key areas that help us understand performance:

- Gross Profit (GP)
- Incentives

Daily GP Target (Tradespeople)

For qualified tradespeople, one of the key performance expectations is a **Gross Profit (GP) target of $2,000 per day**.

This is not about rushing work or cutting corners.

It is based on:

- Completing jobs efficiently
- Managing materials and costs properly
- Identifying and completing additional approved work
- Working to standard while maintaining a quality and safety

This target helps ensure:

- Jobs are profitable
- The business remains sustainable
- There is consistent work and opportunity for the team
- Performance is clear and measurable

Some days may be higher, some lower, but this is the benchmark we work towards over time.

Gross Profit (GP) – What It Really Means on the Tools

Gross Profit (GP) is one of the most important ways we measure how effectively jobs are being delivered.

In simple terms:

> **Gross Profit = Money earned from a job minus the direct costs of doing that job**

Direct costs include:

- Materials and parts (pipes, fittings, taps, etc.)
- Subcontractor costs if used
- Permits or fees
- Any direct job-related expenses

It does **not** include wages.

Simple Example

- Job revenue: $2,500
- Direct costs: $1,050
- Gross Profit: $1,450

That GP contributes directly to keeping the business running and profitable.

Why GP Matters for You

GP helps us understand:

- How efficiently jobs are being completed
- Whether materials and time are being managed well
- Whether additional work is being identified and completed properly
- Whether jobs are being delivered in line with expectations

It is not about blame. It is about clarity and improvement.

Incentives (Rewarding Good Performance)

Incentives are used to recognise and reward strong performance in the business.

Once performance is tracked properly, we can reward:

- Efficient job completion
- Strong GP performance
- Good communication and customer experience
- Identifying additional work opportunities (upsells)
- Consistent high-quality work

Upselling & Add-On Work (On-Site Opportunities)

As a plumber, you are often in the best position to identify additional work while already on-site.

This might include:

- Replacing worn taps during a service call
- Upgrading safety devices where required
- Identifying preventative maintenance needs
- Offering practical solutions to avoid future breakdowns

These are not sales tactics. They are professional recommendations based on what you see on-site.

When done properly, they:

- Improve customer outcomes
- Increase job value
- Reduce future emergency issues
- Reward your ability to identify real problems

Why This Matters

Every job is different. Performance is influenced by:

- Job type and complexity
- Materials and conditions
- On-site decision making
- Communication and customer interaction

That's why we measure more than just hours worked. We measure outcomes.

Your performance is not just about working hard. It's about working smart, communicating well and delivering value on every job.

We don't expect perfection from day one.

We expect:

- Progress
- Consistency
- Awareness
- And a willingness to improve

When you understand your GP targets and incentives, you understand how to succeed here…and how to grow with the business.

SECTION 12 – Personal Responsibilities

12.1 Timesheets (Tradespeople & Apprentices)

INSTRUCTION:

Use this page to clearly explain how timesheets work across the business and why accurate time tracking is critical.

This section should remove any confusion about logging time, reinforce accountability and connect timesheets directly to payroll accuracy.

This page should:

- Explain that all time worked must be logged correctly
- Clarify that job time tracking is the source of all timesheets and payroll
- Set expectations for when and how time should be recorded
- Apply to both tradespeople and apprentices equally
- Emphasise accuracy, consistency and real-time entry (not end-of-week guessing)
- Reinforce that timesheets are not optional or approximate. They must reflect actual work done
- Keep tone practical, direct and accountability-focused

This section should answer:
"Why is accurate time tracking important and how do I make sure my timesheet is correct?"

EXAMPLE:

Timesheets are one of the most important parts of how the business runs.

They are not just admin. They directly control payroll, job costing and business performance.

Why Timesheets Matter

Every hour you work must be recorded correctly in AroFlo.

This is because:

- AroFlo job time tracking is what generates your timesheet
- Your payroll is calculated from your recorded job time
- Job profitability depends on accurate time data
- Incorrect time entries affect both you and the business

If time is not recorded correctly, it creates payroll issues, job costing errors and unnecessary confusion.

AroFlo is the Source of Truth

All time worked must be logged in AroFlo against the correct job.

This includes:

- Start and finish times on each job
- Travel time where applicable
- Any time spent on variations or additional work

If it is not in AroFlo, it does not exist for payroll purposes.

When to Log Time

Time should be recorded:

- At the start of each job
- When moving between jobs
- When finishing work for the day
- As soon as possible (not hours or days later)

Real-time entry is expected. Relying on memory at the end of the week leads to errors.

This applies to everyone on the tools.

You are responsible for:

- Ensuring your time is correctly assigned to the right job
- Updating AroFlo as you move through your day
- Making sure your entries reflect actual time worked
- Flagging any issues or missed entries immediately

If something doesn't look right, it must be raised straight away, not left until payroll is processed.

Accuracy Expectations

Your timesheet must reflect reality.

That means:

- No estimating hours at the end of the week
- No "rounding up or down" time worked
- No missed job entries
- No logging time against the wrong job

Accuracy is essential for both payroll and job tracking.

Common Mistakes to Avoid

- Forgetting to start or stop time in AroFlo
- Logging time to the wrong job
- Trying to rebuild a week from memory
- Delaying updates until later in the day or week

These issues create payroll delays and job costing errors that can usually be avoided.

Responsibility

Your timesheet is your responsibility.

The office can support with corrections, but they cannot guess or rebuild your day for you.

If your time is not recorded correctly:

- Payroll may be affected
- Job records will be incorrect
- You will be asked to clarify or correct entries

If you worked the time, it must be in AroFlo.

Accurate time tracking keeps payroll correct, jobs accurate and the business running smoothly.

12.2 Leave & Availability

INSTRUCTION:

Use this page to clearly outline how leave works across the business and what is expected when requesting time off or reporting unavailability.

This section is about ensuring planning, fairness and operational coverage so jobs can continue running smoothly without disruption.

This page should:

- Explain how annual leave, personal leave and other leave types are requested and approved
- Set clear notice requirements for leave requests and sick leave notifications
- Reinforce that leave must be approved before commitments are made

- Clarify expectations around availability, especially during busy periods and shutdowns
- Explain what to do when unavailable for work (planned and unplanned)
- Maintain compliance with employment standards while keeping it practical and operational
- Keep tone clear, structured and accountability-focused (not legal-heavy or overly formal)

This section should answer:
"How do I request leave and what do I do if I can't make it to work?"

EXAMPLE:

Leave and availability must be managed carefully to keep jobs running smoothly and ensure fair planning across the team.

All leave must be requested, approved and communicated correctly.

Annual Leave

Annual leave must be requested in advance and approved before any bookings or commitments are made.

Key requirements:

- Must complete an Annual Leave Request Form in Xero
- Must be approved by management before confirming plans
- **Minimum notice required:**
  - 4 weeks for one week or more
  - 1 week for single days
- For more information on how to apply for annual leave
  - Tradespeople & Apprentices click here
  - Office Staff click here

Approval considerations:

- Approved on a first-in, first-served basis
- Operational needs and staffing levels are always considered
- Leave may not be approved during busy periods (especially November–December)

Annual Shutdown Period

The business may close for a shutdown period (typically over Christmas).

Expectations:

- Minimum 1 week leave required from 25 December
- You must have enough annual leave accrued to cover this period
- If insufficient leave is available, unpaid leave will apply
- A small skeleton crew may be rostered during this time

Public Holidays

Public holidays are managed in line with employment standards.

- You are generally entitled to public holiday provisions under NES
- Due to operational needs, you may be required to work some public holidays
- You will be given advance notice if work is required

Personal (Sick / Carer's) Leave

Personal leave is for illness, injury or caring responsibilities.

When it can be used:

- You are unfit for work due to illness or injury
- You need to care for an immediate family or household member

Notification rules:

- You must call your manager directly on the first day
- Notification must be made by phone (not text or email)
- Notify the night before your shift where possible
- If absence continues, provide daily updates unless a medical certificate is supplied

Evidence may be required:

- **Medical certificate or statutory declaration may be required for:**
  - 2+ consecutive days
  - Days adjacent to weekends or public holidays
- Additional evidence may be requested at management discretion

Return to Work

When returning from leave:

- Notify your manager as soon as return date is known
- A return-to-work discussion may be required
- Medical clearance may be required depending on circumstances
- You must not return to work if medically unfit or contagious without clearance

Parental Leave

- Available to eligible employees in line with NES
- Requires early notification and supporting documentation
- May include unpaid parental leave up to 12 months (with possible extension)
- Must be planned and discussed with management in advance
- See Employee Handbook for more details

Compassionate Leave

- Available for serious illness, injury, death or miscarriage in immediate family
- Typically 2 days paid leave per occasion for eligible employees
- Casual employees are unpaid
- See Employee Handbook for more details

Long Service Leave

- Provided in line with state legislation
- Taken as soon as reasonably practical once eligible
- See Employee Handbook for more details

Community Service Leave

- Applies to eligible activities (e.g. emergency services, jury duty)
- Generally unpaid (jury duty may vary by legislation)
- See Employee Handbook for more details

Family & Domestic Violence Leave

- 10 days paid leave per year
- Available for situations involving family or domestic violence
- Can be used for safety arrangements, legal matters, medical support or related needs

- Confidentiality is maintained wherever possible
- See Employee Handbook for more details

Time Off (General Requests)

- For appointments or personal matters where possible, book outside work hours
- **If time off during work hours is required:**
  - Must be approved by management
  - Typically unpaid unless otherwise agreed

Availability Expectations

To support smooth operations:

- Keep availability updated with the office
- Do not make personal commitments during work hours without approval
- Provide as much notice as possible for any changes
- Be proactive if you foresee availability issues

Leave must always be planned where possible and communicated early.

Good planning keeps jobs running, ensures fairness across the team and avoids last-minute disruption.

12.3 Expenses & Purchases

INSTRUCTION:

Use this page to clearly define how expenses, purchases and reimbursements are handled within the business.

This section is about ensuring accountability, preventing misuse and making sure employees understand what can and cannot be claimed.

This page should:

- Explain when expenses are eligible for reimbursement
- Set clear expectations around authorisation before spending money
- Define the process for submitting receipts and reimbursement forms
- Clarify timelines for submitting claims (weekly submission requirement)
- Outline correct use of company cards and bank accounts
- Reinforce responsibility, transparency and proper record keeping
- Keep tone practical, clear and accountability-focused (not financial jargon heavy)

This section should answer:
"How do I get reimbursed for work-related expenses and what are the rules around spending business money?"

EXAMPLE:

Expenses and purchases must always be managed carefully to ensure transparency, accountability and accurate record keeping.

Only approved and reasonable business-related expenses will be reimbursed.

Reimbursable Expenses

You may be reimbursed for work-related expenses where:

- The expense is reasonable
- The expense has been authorised by management
- It is directly related to business operations

Examples may include approved materials, job-related purchases or operational expenses incurred on behalf of the business.

Authorisation Requirement

Before making any purchase on behalf of the business:

- You must have approval from management
- Do not assume expenses will be reimbursed if not pre-approved
- If unsure, always check first before spending

Unapproved expenses may not be reimbursed.

Reimbursement Process

To claim reimbursement:

- Complete a reimbursement form
- Attach all relevant receipts
- Submit all claims at the end of each week
- Ensure details are clear and accurate
- Detailed process for reimbursement can be found here

Late or incomplete submissions may delay reimbursement.

Receipts & Documentation

Receipts are required for all expense claims.

You must ensure:

- Receipts are clear and legible
- Each expense is matched to the correct job or purpose
- Nothing is submitted without supporting documentation

No receipt = no reimbursement (unless otherwise approved by management).

Company Cards & Bank Accounts

If you are issued or use any company card or bank account:

You are responsible for:

- Using it only for business-related expenses
- Ensuring all transactions are appropriate and authorised
- Keeping security of cards and account details at all times
- Reporting any issues or unauthorised use immediately

Company funds must be treated with care and integrity at all times.

Expectations

To keep the process clear and fair:

- Always seek approval before spending
- Keep receipts and records for all purchases
- Submit claims weekly without delay
- Do not mix personal and business expenses
- Use company funds responsibly and only when required

If it's a business expense, it must be approved, documented and submitted correctly.

Clear processes protect both you and the business.

12.4 Personal Organisation

INSTRUCTION:

Use this page to set expectations around how team members manage themselves, their work and their day-to-day organisation while working in the business.

This section is about building accountability, consistency and professionalism in how people show up to work and manage their responsibilities.

This page should:

- Explain the expectation that team members are responsible for their own organisation
- Cover basic work readiness (tools, vehicle, PPE, materials and job preparation)
- Reinforce planning ahead for the day and the week
- Encourage proactive thinking rather than reactive problem solving
- Highlight the importance of punctuality, preparedness and reliability
- Support better job flow by reducing delays caused by disorganisation
- Keep tone practical, direct and standards-focused (not motivational or abstract)

This section should answer:
"What is expected of me in how I organise myself for work each day?"

EXAMPLE:

Personal organisation is a core responsibility of every team member.

How you manage yourself each day directly affects job flow, team performance and customer experience.

Responsibility for Being Prepared

You are responsible for arriving ready to work each day.

This includes:

- Being on time and ready to start
- Having the correct tools and equipment
- Ensuring your vehicle is stocked and organised
- Wearing the correct PPE
- Being prepared for the jobs scheduled that day

Lack of preparation causes delays for the entire team.

Daily Planning

Each team member is expected to understand their day before starting work.

You should:

- Review any allocated jobs in advance
- Understand job locations and requirements
- Check for any updates or changes
- Ensure you have everything needed before leaving

If something is unclear, it must be clarified before the job starts, not during it.

Weekly Awareness

Good organisation is not just daily. It is ongoing.

You should:

- Be aware of your upcoming workload
- Plan ahead for materials, tools or access requirements
- Flag any potential issues early
- Communicate conflicts or concerns as soon as they are known

Tools, Vehicles & Equipment

You are responsible for keeping your tools, vehicle and equipment in good working order.

This includes:

- Keeping tools clean, functional and complete
- Maintaining a well-stocked and organised vehicle
- Reporting damaged or missing equipment immediately
- Ensuring consumables are replenished before they run out

Disorganisation in tools or vehicles slows down every job.

Punctuality & Reliability

Being organised also means being dependable.

Expectations:

- Arrive on time, every time
- Be ready to start at the scheduled time
- Communicate early if delays are unavoidable
- Do not leave others waiting due to poor preparation

Reliability is a key part of professional performance.

Proactive Thinking

Strong team members:

- Plan ahead instead of reacting in the moment
- Solve small problems before they become job delays
- Ask questions early when unsure
- Take ownership of their day and workload

Waiting until problems happen slows everything down.

What Good Organisation Looks Like

- Arriving fully prepared for the day's work
- No delays caused by missing tools or materials
- Smooth transitions between jobs
- Clear understanding of priorities
- Minimal last-minute issues or disruptions

Good organisation is personal responsibility.

When you are organised, the whole team works better, jobs run smoother and customers get a better experience.

SECTION 13 – Technology & Security Basics

13.1 Logging Into Systems

INSTRUCTION:

Use this page to clearly explain how team members are expected to access and use business systems.

This is an onboarding-level guide focused on clarity, consistency and basic expectations around system access.

This page should:

- Explain why systems are used in the business (simple overview)
- Cover how staff are expected to log into systems correctly and consistently
- Apply to both field staff and office staff
- Reinforce that systems are part of daily work, not optional extras
- Emphasise accuracy, responsibility and keeping information up to date
- Keep tone simple, practical and non-technical
- Avoid deep IT detail. Focus on behaviour and expectations

This section should answer:
"How do I access and use the systems I need for my job?"

EXAMPLE:

In this business, we use a range of digital systems to keep jobs, customers, communication and operations running smoothly.

These systems are not optional. They are a core part of how we work every day.

They help us:

- Manage jobs from booking through to completion
- Communicate between office and field teams
- Store important job and customer information
- Track performance, safety and financial data
- Keep the business organised and efficient

Accessing Systems

Every team member will be given access to the systems required for their role.

This may include:

- Job management systems (e.g. Aroflo)
- Communication tools (e.g. Microsoft Teams, WhatsApp groups)
- Scheduling and planning tools (e.g. Asana for office staff)
- Email and document systems
- Finance or reporting tools (for relevant roles)
- Storage platforms for files, photos and job information

General Expectations for Logging In

All staff are expected to:

- Log in to systems using their own individual access details
- Use systems as part of their daily workflow
- Ensure they are logged in and ready before starting work
- Keep login details secure and not shared with others
- Report any access issues immediately to the office or manager
- Ensure information entered into systems is accurate and up to date

Field Staff (Tradies & Apprentices)

For field staff, systems are mainly used for job management and communication.

You are expected to:

- Check job details before leaving for site
- Update job progress, notes and photos during or after jobs
- Ensure all completed work is recorded properly
- Use systems to confirm job status and next steps
- Treat system updates as part of job completion (not optional admin)

If it is not recorded in the system, it is not complete.

Office Staff (Admin Team)

Office staff rely heavily on systems to manage operations.

You are expected to:

- Log in at the start of the workday and maintain system visibility
- Manage job scheduling, updates and communication through systems
- Keep customer and job information accurate and current
- Ensure all jobs are tracked correctly from booking to completion
- Support field staff by maintaining clear and updated job records

Systems are the backbone of office operations. Accuracy is critical.

Why This Matters

Proper system use ensures:

- Jobs run smoothly without confusion
- Everyone has access to the right information at the right time
- Customers receive consistent communication
- The business stays organised and efficient
- Mistakes and delays are reduced

Systems only work properly when everyone uses them properly.

Logging in is just the start. Keeping them updated is what keeps the business running smoothly.

13.2 Password & Access Expectations

INSTRUCTION:

Use this page to clearly explain how passwords and system access are managed across the business.

This is a basic cybersecurity and responsibility overview for new team members.

This page should:

- Explain why password security matters in a simple, practical way
- Introduce Keeper as the business password management system
- Set clear expectations around not sharing passwords or access

- Apply to both field staff and office staff
- Reinforce responsibility, trust and professionalism
- Keep tone simple, direct and non-technical
- Focus on behaviour and accountability rather than technical detail

This section should answer:
"How do I safely access and manage the systems I use for work?"

EXAMPLE:

In this business, we handle important customer information, job details, financial data and internal systems every day.

Because of this, keeping passwords and access secure is extremely important.

Good password habits protect:

- Our customers and their information
- The business and its systems
- Your own access and accounts
- The team from mistakes, breaches or security issues

Keeper (Password Management System)

We use **Keeper** as our official password and access management system.

Keeper is where all business login details are securely stored and managed.

This means:

- You do not need to remember multiple passwords
- You do not need to write passwords down or store them elsewhere
- You access systems using secure, approved login methods
- The business can control and update access safely when needed

Keeper keeps everything centralised, secure and easy to manage.

General Password Expectations

All team members are expected to:

- Use Keeper for all work-related logins
- Never share passwords with other staff verbally, via message or in writing
- Never use personal or unsecured notes to store passwords

- Keep login details private at all times
- Report any suspected security issue immediately
- Log out of systems when required (especially on shared or office devices)

Field Staff (Tradies & Apprentices)

For field staff, you may be logging into systems on mobile devices or tablets.

You are expected to:

- Use Keeper to access job-related systems securely
- Ensure devices are locked when not in use
- Never allow customers or external parties to access your device
- Report lost or stolen devices immediately
- Treat all logins as professional and confidential

Office Staff (Admin Team)

Office staff will manage multiple systems daily.

You are expected to:

- Use Keeper for all business system access
- Ensure passwords are not stored in browsers or personal notes
- Update access details only through approved processes
- Support secure onboarding and offboarding of staff access
- Maintain high standards of data security at all times

Why This Matters

Strong password security:

- Protects the business from cyber risks and data breaches
- Keeps customer information safe and compliant
- Reduces operational disruption caused by security issues
- Ensures only the right people have access to the right systems

Access is a responsibility, not just a convenience.

Using Keeper properly ensures the business stays secure, professional and protected at all times.

13.3 Avoiding Scams & Mistakes

INSTRUCTION:

Use this page to help team members recognise and avoid common scams, errors and preventable mistakes when using technology.

This is a practical awareness guide, not a technical cybersecurity lesson.

This page should:

- Highlight common risks (emails, messages, links, payments, customer interactions)
- Apply to both field staff and office staff
- Reinforce slowing down and thinking before acting
- Encourage asking questions when unsure
- Emphasise that small mistakes can have big consequences
- Keep tone simple, practical and relatable
- Focus on behaviour, awareness and accountability

This section should answer:
"How do I avoid making costly mistakes or falling for scams?"

EXAMPLE:

In today's work environment, scams and simple mistakes are more common than ever.

They don't just happen to big companies. They happen to everyday businesses like ours.

Most issues don't come from complicated hacking… **they come from:**

- Clicking the wrong link
- Trusting the wrong message
- Entering information too quickly
- Not double-checking details

The good news, almost all of these are avoidable with the right awareness.

Common Risks to Watch For

Be alert to anything that feels unusual, rushed or unclear.

This includes:

- Emails asking for urgent action or payments
- Messages with links you weren't expecting
- Requests to update bank details or login information
- Unknown phone calls asking for business or customer details
- Attachments from unfamiliar senders
- "Too good to be true" offers or deals

If something feels off, it probably is.

Email & Message Awareness

Before clicking or responding:

- Check who the message is from (not just the name, the actual email address)
- Look for spelling mistakes, strange wording or unusual requests
- Be cautious of urgency ("Do this now", "Immediate action required")
- Avoid clicking links unless you are 100% sure they are legitimate

When in doubt, don't click.

Payment & Financial Mistakes

One of the most common risks is incorrect or fraudulent payment details.

Always:

- Double-check bank account details before making or confirming payments
- Never rely on a single email for payment changes. Verify through a second method (e.g. phone call)
- Follow internal approval processes for purchases and payments
- Report anything unusual immediately

A simple check can prevent a costly mistake.

Field Staff (Tradies & Apprentices)

In the field, risks are often tied to mobile use and customer interaction.

You are expected to:

- Avoid using unsecured public Wi-Fi for work-related tasks
- Be cautious when receiving unexpected calls or messages
- Not share business or customer information with unknown parties
- Double-check job details and customer information before acting
- Confirm anything unclear with the office before proceeding

Office Staff (Admin Team)

In the office, you may handle more communication and financial processes.

You are expected to:

- Be extra cautious with emails involving payments, invoices or account changes
- Verify unusual requests before acting on them
- Follow processes for approvals and documentation
- Avoid rushing through tasks that require accuracy
- Flag anything suspicious immediately

Avoiding Simple Mistakes

Not all risks are scams. Many are simple errors.

Common mistakes include:

- Entering incorrect job details
- Sending information to the wrong person
- Forgetting to update systems
- Miscommunication between office and field
- Rushing and skipping checks

These are preventable by slowing down and double-checking your work.

When You're Not Sure

If something doesn't feel right:

- Stop
- Don't act on it immediately
- Ask a manager or team member
- Verify before proceeding

It is always better to ask than to guess.

Why This Matters

Avoiding scams and mistakes:

- Protects the business financially
- Keeps customer information secure
- Prevents unnecessary stress and rework
- Maintains trust with customers and suppliers
- Keeps operations running smoothly

Slow down, think and check.

Most mistakes and scams can be avoided by taking an extra moment before acting.

13.4 Responsible Tech Use

INSTRUCTION:

Use this page to outline expectations around how technology and devices are used within the business.

This is about professionalism, responsibility and using tech in a way that supports the job, not distracts from it.

This page should:

- Apply to both field staff and office staff
- Cover appropriate use of phones, tablets and computers
- Reinforce that devices are work tools first
- Address distractions, personal use and professionalism
- Include expectations around customer-facing behaviour
- Keep tone practical, clear and non-preachy
- Focus on behaviour and standards, not technical rules

This section should answer:
"How am I expected to use technology while working?"

EXAMPLE:

Technology is a key part of how we run the business. From job management and communication through to customer service and reporting.

Phones, tablets and computers are not just devices. They are tools that support how we work every day.

Using them properly helps everything run smoothly. Using them poorly creates distractions, mistakes and unprofessional experiences.

Work Use Comes First

All devices provided (or used for work purposes) are primarily for work.

This means:

- Completing and updating jobs
- Communicating with the office and team
- Accessing systems and information
- Supporting customer interactions

Personal use should never interfere with work responsibilities.

Field Staff (Tradies & Apprentices)

When on-site, your device use is visible to customers. It directly impacts how professional you appear.

You are expected to:

- Use your phone or tablet for job-related tasks while on-site
- Avoid phone use in front of customers unless necessary
- Never scroll social media or take personal calls during active work
- Step away from the customer if you need to take an urgent call
- Use devices to support the job (photos, notes, quoting, communication)

If a customer sees you on your phone, it should always look work-related.

Office Staff (Admin Team)

In the office, technology is used constantly, but expectations still apply.

You are expected to:

- Stay focused on work tasks during work hours
- Avoid personal browsing or distractions
- Use systems and communication tools efficiently
- Maintain professionalism in all written communication (emails, messages, etc.)
- Ensure accuracy when entering or updating information

Efficient tech use keeps the whole business running properly.

Customer-Facing Behaviour

Technology should always support the customer experience, not take away from it.

This means:

- Giving customers your attention when speaking with them
- Not being distracted by devices during conversations
- Using devices to clearly explain work (photos, quotes, reports)
- Keeping communication professional at all times

Protecting Devices & Information

Responsible tech use also includes taking care of devices and data.

All staff are expected to:

- Keep devices secure and not leave them unattended
- Lock devices when not in use
- Avoid accessing work systems on unsecured networks
- Report lost, stolen or damaged devices immediately
- Follow password and security protocols (including using Keeper)

Avoiding Distractions

Technology can easily become a distraction if not managed properly.

Be mindful of:

- Social media use during work hours
- Non-work messaging or browsing
- Notifications interrupting focus
- Multitasking that reduces accuracy

Staying focused improves performance and reduces mistakes.

Why This Matters

Responsible tech use:

- Improves productivity and efficiency
- Maintains a professional image with customers
- Reduces errors and miscommunication
- Protects business and customer information
- Keeps the team aligned and on track

Use technology to support your work, not distract from it.

When used properly, it makes your job easier, faster and more professional.

SECTION 14 – Growth & Development Pathways

14.1 What Progress Looks Like Here

INSTRUCTION:

Use this page to help new team members understand how growth and progress happen within the business.

This is about setting clear expectations, not just on performance, but on development over time.

This page should:

- Explain that growth is expected, supported and measured
- Apply to all roles (tradies, apprentices and office staff)
- Show that progress is based on consistency, attitude and skill development
- Reinforce that improvement over time matters more than perfection on day one
- Give a clear picture of what "getting better" looks like in this business
- Keep tone encouraging, realistic and grounded

This section should answer:
"What does growth actually look like for me here?"

EXAMPLE:

At ABC Trade Business, progress is not about being perfect. It's about getting better over time.

We don't expect you to know everything from day one. What we do expect is that you show up, learn, apply feedback and continue improving.

Growth here is built through consistency, effort and a willingness to develop your skills.

The First Stage — Learning the Basics

When you first start, progress looks like:

- Understanding how we operate as a business
- Learning systems, processes and expectations
- Getting familiar with job flow and communication
- Asking questions and taking on feedback
- Building confidence in your role

This stage is about learning how things work.

The Second Stage — Building Confidence

As you settle in, progress looks like:

- Completing tasks more independently
- Making better decisions on the job or in the office
- Communicating more clearly with customers and the team
- Improving speed without losing quality
- Taking more ownership of your responsibilities

This is where things start to feel more natural.

The Third Stage — Consistency

Once you understand the role, progress becomes about consistency.

This looks like:

- Delivering the same standard of work every day
- Meeting targets and expectations regularly
- Managing time, jobs and responsibilities effectively
- Maintaining strong communication across all situations
- Representing the business professionally at all times

Consistency is what separates average from great.

The Fourth Stage — Taking Ownership

As you grow further, progress looks like:

- Taking full ownership of your role and results
- Identifying problems and bringing solutions
- Supporting other team members
- Thinking ahead instead of reacting
- Contributing to improvements in how we operate

At this stage, you are not just doing the job. You are adding value to the business.

What Progress Is Based On

Your growth here is not just based on time. It is based on:

- Attitude and effort
- Willingness to learn and improve
- How you respond to feedback
- Consistency in your performance
- How you contribute to the team

Two people can start at the same time and progress at very different speeds. It comes down to how you show up.

Applies to Every Role

No matter your role, progress follows the same pattern:

- **Tradies** → From learning systems → to running jobs → to managing performance and results
- **Apprentices** → From assisting → to learning skills → to becoming independent tradespeople
- **Office Staff** → From learning systems → to managing workflow → to improving operations and performance

Everyone is on a pathway. It just looks slightly different depending on your role.

Why This Matters

Understanding progress helps you:

- Know what is expected at each stage
- Stay focused on improvement
- Build confidence over time
- Take ownership of your development
- See a clear pathway forward in the business

Progress is not about being the best on day one.

It's about showing up, improving every day and becoming someone the team can rely on.

If you focus on that, growth will happen.

14.2 Skills You're Expected To Build

INSTRUCTION:

Use this page to clearly outline the key skills every team member is expected to develop over time.

This is not a technical training checklist. It is a practical overview of the core skills that lead to success in the business.

This page should:

- Apply to all roles (tradies, apprentices and office staff)
- Cover both technical and non-technical skills
- Reinforce that skill development is ongoing, not a one-time process
- Show that growth includes communication, organisation and decision-making
- Keep tone practical, clear and encouraging

This section should answer:
"What skills do I need to develop to succeed here?"

EXAMPLE:

At ABC Trade Business, your role is not just about completing tasks. It's about continuously building the skills that make you better, more capable and more valuable over time.

These skills go beyond just "doing the job." They include how you think, communicate, plan and operate day-to-day.

1. Technical Skills (Doing the Job Properly)

Every role requires strong technical ability.

- **Tradies & Apprentices**
  - Plumbing knowledge and hands-on skills
  - Understanding systems, tools and materials
  - Diagnosing issues and delivering the right solution
  - Completing work safely and to a high standard
- **Office Staff**
  - Using systems (Aroflo, scheduling tools, CRM, etc.)
  - Managing job flow and customer information
  - Handling bookings, quotes and communication accurately

Technical skills are the foundation, but they are only one part of the job.

2. Communication Skills

Strong communication is critical across the entire business.

This includes:

- Speaking clearly and professionally with customers
- Keeping the office and team updated
- Explaining work in simple, easy-to-understand terms
- Listening properly before responding
- Handling difficult conversations calmly and respectfully

Good communication builds trust and prevents mistakes.

3. Organisation & Time Management

Being organised makes everything easier.

You are expected to:

- Manage your time effectively throughout the day
- Stay on schedule where possible
- Keep tools, vehicles or workspaces organised
- Plan ahead instead of reacting last minute
- Keep systems and notes up to date

Disorganisation leads to delays, mistakes and unnecessary stress.

4. Problem Solving & Decision Making

Not every situation will have a clear answer.

You are expected to:

- Think through problems before acting
- Use common sense and available information
- Look for solutions, not just identify problems
- Ask for help when needed (not guess)
- Make decisions that support the customer and the business

The goal is to become someone who can handle situations confidently and professionally.

5. Attention to Detail

Small details make a big difference.

This includes:

- Accurate job notes and documentation
- Correct materials and parts selection
- Clean and professional presentation
- Double-checking work before completion
- Ensuring nothing is missed

Attention to detail improves quality, efficiency and customer trust.

6. Customer Awareness

Every role contributes to the customer experience.

You are expected to:

- Be polite, respectful and approachable
- Understand the customer's perspective

- Deliver a smooth, professional experience
- Represent the business properly at all times
- Look for ways to add value (not just complete the task)

Customers remember how they were treated, not just the job itself.

7. Accountability & Ownership

Taking ownership is a key part of growth.

This means:

- Owning your work and your results
- Taking responsibility for mistakes and learning from them
- Following through on commitments
- Not blaming others or making excuses
- Looking for ways to improve

Ownership builds trust within the team and with customers.

8. Continuous Improvement

No matter your experience level, there is always room to improve.

You are expected to:

- Take on feedback and apply it
- Learn from mistakes
- Ask questions and stay curious
- Look for better ways to do things
- Develop both professionally and personally

Growth is ongoing, not something that stops after onboarding.

Your success here is not just based on what you know. It's based on how you grow.

If you focus on building these skills consistently, you will improve faster, perform better and create more opportunities for yourself within the business.

14.3 Reviews & Check-Ins

INSTRUCTION:

Use this page to explain how performance, progress and development are reviewed within the business.

This is about setting clear expectations around feedback, accountability and ongoing improvement.

This page should:

- Explain what reviews and check-ins are and why they matter
- Reinforce that feedback is a normal and expected part of the job
- Apply to all roles (tradies, apprentices and office staff)
- Cover both informal (day-to-day) and formal (scheduled) check-ins
- Keep tone supportive, practical and non-intimidating
- Position reviews as a tool for growth, not criticism

This section should answer:
"How and when will my performance be reviewed?"

EXAMPLE:

At ABC Trade Business, feedback and communication are a normal part of how we work.

Reviews and check-ins are not something to worry about. They are how we help you improve, stay on track and continue progressing in your role.

They give you clarity on how you're going, what's expected and where you can improve.

Day-to-Day Check-Ins (Informal)

Most feedback happens in real time.

This includes:

- Quick conversations on-site or in the office
- Feedback after completing a job or task
- Daily communication around performance, jobs or issues
- Support when something doesn't go to plan

These check-ins are:

- Fast
- Practical
- Focused on immediate improvement

This is where most learning happens.

Weekly / Regular Check-Ins

You will also have more structured, regular check-ins to keep everything on track.

These include:

- Weekly performance conversations
- Toolbox meetings
- Team updates and operational check-ins

These are used to:

- Review how work is tracking
- Discuss performance (jobs, targets and GPs)
- Share updates, improvements and learnings
- Identify any issues early
- Provide support and direction

These are not formal reviews. They are consistent touch points to keep the team aligned and improving.

Formal Reviews

At key points, you will have structured performance reviews.

These occur:

- At the end of your probation period
- Every 6 months
- Anytime management believe a review is required

These reviews focus on:

- Overall performance
- Strengths and areas for improvement
- Progress against expectations
- Future goals and development opportunities

This is your opportunity to:

- Understand where you stand
- Ask questions
- Get clear direction on your next steps

What You'll Be Reviewed On

Reviews are based on a combination of:

- Work quality and consistency
- Communication with customers and the team
- Efficiency and job performance
- Use of systems and processes
- Attitude, reliability and teamwork
- Willingness to learn and improve

For tradespeople, this may also include:

- Job performance and outcomes
- Gross Profit (GP) trends
- Ability to identify and complete additional work

Your Role in the Process

Reviews are not one-sided. You are expected to be involved.

You should:

- Be open to feedback
- Ask questions if something is unclear
- Take ownership of your development
- Apply feedback and show improvement over time
- Speak up if you need support

The more engaged you are, the more you will get out of it.

Why This Matters

Regular check-ins and reviews:

- Help you improve faster
- Prevent small issues becoming bigger problems

- Keep expectations clear
- Build confidence in your role
- Create opportunities for growth and progression

Feedback is not a negative. It's how you get better.

The more open you are to it, the faster you will grow and succeed in the business.

14.4 Opportunities Inside ABC Trade Business

INSTRUCTION:

Use this page to show team members what opportunities exist within the business as they grow.

This is about creating a clear picture of what's possible, not just the job they were hired to do today, but where it can lead.

This page should:

- Highlight growth opportunities across all roles (tradies, apprentices, office staff)
- Show that development leads to increased responsibility and opportunity
- Reinforce that progression is based on performance, attitude and consistency
- Keep tone motivating, realistic and grounded (not over-promising)
- Help team members see a future within the business

This section should answer:
"What opportunities are available to me here?"

EXAMPLE:

At ABC Trade Business, this is not just a job. It's a pathway.

As the business grows, so do the opportunities for the people inside it.

We are always looking to develop and promote from within wherever possible. That means the more you grow, the more opportunity becomes available to you.

Growth Isn't Automatic. It's Earned

Opportunities don't come from time alone.

They come from:

- Consistent performance
- Strong attitude

- Reliability and accountability
- Willingness to learn and improve
- Contribution to the team and business

When you show up the right way consistently, opportunities follow.

Pathways for Tradespeople

For qualified tradespeople, progression may include:

- Taking full ownership of jobs and results
- Increasing responsibility for performance (targets, GP, efficiency)
- Mentoring and supporting apprentices
- Becoming a leading hand or senior tradesperson
- Contributing to training and improving team standards

Over time, this can lead to:

- Leadership roles within the field team
- Greater involvement in business operations
- Increased earning potential through performance

Pathways for Apprentices

For apprentices, the pathway is clear:

- Learn the trade properly
- Build skills and confidence over time
- Take on more responsibility as capability grows
- Progress through apprenticeship stages
- Become a qualified tradesperson

Beyond qualification, opportunities open up to follow the same pathways as experienced tradespeople.

Pathways for Office Staff

For office team members, progression may include:

- Taking ownership of specific areas (scheduling, customer experience, systems, reporting)
- Improving processes and efficiency

- Supporting performance tracking and business operations
- Moving into senior admin or operations roles
- Taking on leadership or management responsibilities

As the business grows, the need for strong office leadership grows with it.

Opportunities Beyond Your Role

Growth is not always linear.

Depending on your strengths and interests, opportunities may include:

- Cross-training into different areas of the business
- Taking on specialised responsibilities
- Supporting new team members
- Contributing ideas and improvements to systems and processes

If you show capability and initiative, there is room to grow in multiple directions.

What Creates Opportunity

The people who progress fastest are those who:

- Take ownership of their role
- Look for ways to improve
- Bring solutions, not just problems
- Communicate well and support the team
- Stay consistent, not just "on their best days"

Opportunity is created through action, not just intention.

Why This Matters

Understanding opportunities helps you:

- Stay motivated and focused
- See a future within the business
- Take ownership of your development
- Build a long-term career, not just a job

There is no fixed ceiling here.

If you continue to grow, improve and contribute, there will always be opportunities to step up.

SECTION 15 – Support & Escalation

15.1 Who To Go To (And When)

INSTRUCTION:

Use this page to clearly explain the support structure within the business and who team members should go to for help.

This is about removing confusion. Helping new staff understand the right escalation path depending on the situation.

This page should:

- Outline clear support channels for field staff and office staff
- Explain when to go to peers vs supervisors vs management
- Reinforce that asking for help early is encouraged
- Keep tone simple, supportive and practical
- Reduce hesitation around "bothering" others
- Apply to all roles (tradies, apprentices and office staff)

This section should answer:
"If I have a problem, who do I speak to?"

EXAMPLE:

At ABC Trade Business, you are never expected to figure everything out alone.

There is a clear support structure in place so you always know who to go to when you need help, clarity or escalation.

The key is knowing the right person to speak to at the right time.

Start With Your Direct Team

In most situations, your first point of contact should be:

- A fellow team member
- Your immediate supervisor or lead tradesperson
- The office team (for admin or coordination questions)

Often, small issues can be resolved quickly by speaking to the people closest to the situation.

Field Staff (Tradies & Apprentices)

If you are on-site, your support structure is:

- **First:** Your lead tradesperson or partner on the job (if applicable)
- **Second:** Office team (for job details, materials, scheduling or customer communication)
- **Third:** Management (if the issue cannot be resolved or is urgent/complex)

Examples:

- Missing materials → Office team
- Job uncertainty or technical issue → Lead tradesperson or supervisor
- Customer escalation or complaint → Office or management

Office Staff (Admin Team)

If you are in the office, your support structure is:

- **First:** Your immediate team member or department colleague
- **Second:** Office manager or operations lead
- **Third:** Business management (for escalations or decisions outside your authority)

Examples:

- Scheduling conflicts → Office team / ops lead
- System issues → Internal support or systems lead
- Customer complaints → Escalate to manager immediately

When to Go Straight to Management

Some situations should be escalated immediately without delay.

These include:

- Safety concerns or incidents
- Serious customer complaints
- Urgent operational breakdowns affecting jobs
- Conflicts that cannot be resolved at team level
- Anything that could impact business reputation or customer trust

If in doubt, escalate early.

The Golden Rule

If you are unsure, stuck or uncomfortable:

- Don't wait
- Don't guess
- Don't ignore it

Ask early.

Most issues become bigger when they are left too long.

Why This Matters

Knowing who to go to:

- Saves time and reduces stress
- Prevents mistakes from escalating
- Keeps jobs and operations running smoothly
- Ensures customers get the right response quickly
- Builds confidence across the team

You are never expected to have all the answers.

You are expected to know who to ask and to ask early.

15.2 Raising Issues Early

INSTRUCTION:

Use this page to explain why it is important to raise issues as soon as they are identified, rather than waiting or trying to fix everything alone.

This is about creating a proactive culture where problems are addressed early before they become bigger, more expensive or harder to resolve.

This page should:

- Explain why early communication is critical in both field and office environments
- Encourage team members to speak up without hesitation
- Remove fear around "bothering" others or looking like they don't know something
- Apply to all roles (tradies, apprentices and office staff)
- Reinforce that small issues become big problems when ignored
- Keep tone supportive, practical and direct

This section should answer:
"Why should I raise issues early instead of trying to fix it myself or waiting?"

EXAMPLE:

One of the most important habits in this business is raising issues early.

Not later. Not when it becomes urgent. Not when it turns into a bigger problem. Early.

Why Early Communication Matters

In a plumbing business, small issues can escalate quickly.

What starts as a simple delay or question can turn into:

- A missed job time
- A customer complaint
- A safety risk
- Extra costs or rework
- Disruption to the whole day's schedule

Most of these situations can be avoided simply by speaking up early.

There Is No Penalty for Speaking Up

You are never expected to have all the answers.

If something is unclear, wrong, delayed or doesn't feel right, raise it.

Asking early is seen as:

- Professional
- Responsible
- Proactive
- A sign of good judgment

Staying silent or guessing creates far more problems than asking ever will.

Field Staff (Tradies & Apprentices)

On-site, issues should be raised as soon as they appear.

This includes:

- Missing or incorrect materials
- Unexpected site conditions

- Job scope not matching what was booked
- Safety concerns or hazards
- Uncertainty about how to proceed

Action expected:

- Stop and assess
- Communicate with the office or supervisor
- Clarify before continuing where required

Fixing the wrong thing is worse than pausing to ask.

Office Staff (Admin Team)

In the office, early issue raising helps keep everything flowing.

This includes:

- Scheduling conflicts or delays
- Missing job information
- Customer communication issues
- System or data errors
- Unexpected changes in workload or priorities

Action expected:

- Flag issues immediately
- Don't wait for them to "work themselves out"
- Communicate clearly so the field team is not impacted

The Cost of Waiting

When issues are not raised early:

- Jobs fall behind schedule
- Customers become frustrated
- Teams are forced into reactive mode
- Small problems become expensive fixes
- Stress increases for everyone involved

Most of these situations are avoidable with early communication.

The Right Mindset

A strong team member doesn't hide problems. They surface them early.

Even if you are not sure it is a "real issue", it is better to check.

A quick message or call early in the day can prevent hours of problems later.

Why This Matters

Raising issues early:

- Keeps jobs running smoothly
- Protects customer experience
- Reduces stress and confusion
- Improves teamwork and communication
- Helps the business stay efficient and profitable

If you see something early, say something early.

Early communication is one of the simplest ways to keep the whole business running well.

15.3 Getting Help On Jobs

INSTRUCTION:

Use this page to explain how team members should get support while actively working on jobs.

This is about making it clear that asking for help on-site is expected, not a sign of weakness or lack of ability.

This page should:

- Explain when and how to ask for help during live jobs
- Apply to field staff (tradies and apprentices) primarily, but include office support role
- Reinforce that support is available and encouraged during jobs
- Remove hesitation around stopping work to clarify something
- Emphasise safety, quality and doing the job correctly over rushing
- Keep tone practical, supportive and real-world focused

This section should answer:
"What do I do if I get stuck or need help while I'm on a job?"

EXAMPLE:

No matter how experienced you are, there will be times on the job where you need support.

That is normal and expected.

Plumbing jobs can be unpredictable and not every situation will have a clear answer straight away.

The important thing is not to guess or push through blindly. The important thing is to ask.

It's Okay to Stop and Ask

If you are unsure about something on-site:

- Pause what you are doing
- Assess the situation
- Reach out for support

Getting help early is always better than fixing a mistake later.

There is no expectation that you should "just figure it out" alone in a way that risks quality, safety or customer experience.

Field Staff (Tradies & Apprentices)

On the tools, you are expected to use support when needed.

You should ask for help when:

- You are unsure how to proceed with a task
- The job scope is different to what was expected
- You encounter something unusual or complex
- You are making a decision that could affect cost, safety or quality
- You need clarification before continuing

How to get help:

- Call or message the office
- Speak to your lead tradesperson or supervisor
- Send photos or details if needed for clarity

Clear communication helps everyone respond quickly and correctly.

Office Support for Field Teams

The office is part of your support system while you are on-site.

They can help with:

- Job details and scope clarification
- Customer communication
- Material queries and ordering
- Scheduling adjustments
- Escalations or approvals

If you are stuck, the office is there to help you move forward.

Office Staff (Admin Team)

Office staff also rely on internal support when managing job flow.

You should:

- Ask colleagues when unsure about processes or systems
- Escalate job issues early rather than delaying decisions
- Clarify with management when approvals are needed
- Support field staff by responding quickly to job queries

Fast communication helps keep jobs moving.

Why People Don't Ask (And Why That's a Problem)

Common reasons people hesitate to ask:

- "I should know this already"
- "I don't want to look inexperienced"
- "I'll just try and figure it out"

But in reality, not asking often leads to:

- Mistakes on-site
- Rework or delays
- Increased stress
- Poor customer experience

Asking early is always the better option.

The Right Mindset

Strong team members:

- Ask questions when needed
- Use support without hesitation
- Focus on doing the job correctly, not just quickly
- Communicate clearly when unsure

There is no reward for struggling in silence.

Why This Matters

Getting help on jobs:

- Prevents mistakes and rework
- Improves job quality and outcomes
- Keeps customers happy and informed
- Supports safety and correct procedures
- Helps the whole team perform better

You are never expected to figure everything out alone.

Use the support around you. It exists so the job is done right the first time.

15.4 Internal Communication Flow

INSTRUCTION:

Use this page to clearly define how communication works across the business so everyone knows what channel to use, when to use it and what is expected.

This page is about removing confusion and ensuring communication is consistent between field staff, office staff and management.

This page should:

- Explain the main communication channels used in the business
- Define when each channel should be used'
- Clarify expectations for urgency, updates and escalation
- Reinforce accountability for keeping information flowing both ways

- Support smooth coordination between office and field teams
- Reduce missed messages, assumptions and delays
- Keep tone practical, simple and operational (not corporate or theoretical)

This section should answer:
"How do we communicate properly so jobs run smoothly and nothing gets missed?"

EXAMPLE:

Clear communication is what keeps a busy trade business running smoothly.

When the right information gets to the right person at the right time, jobs run better, customers are happier and problems get solved before they grow.

This system is designed to keep communication simple, structured and reliable across the whole team.

Core Communication Channels

We keep communication consistent by using the right channel for the right purpose.

Field Team Communication Structure

To Individual Field Team Member

Use: WhatsApp individual chat

Used for:

- Direct job instructions
- Quick updates between team members
- Clarifications on specific tasks

Expectations:

- Keep messages clear, short and job-specific
- Respond promptly during working hours
- Confirm instructions where required (don't assume)
- Use photos when it helps avoid confusion

To All Field Team Members

Use: WhatsApp group chat

Used for:

- Job-wide updates affecting multiple techs
- Site coordination messages
- General field announcements

Expectations:

- Keep communication relevant to all (no side conversations)
- Avoid clutter. Only post information the group needs
- Acknowledge key updates when action is required
- Keep it professional and work-focused

To Office Team

Use: WhatsApp office chat

Used for:

- Job updates requiring office action
- Scheduling changes
- Material requests and job coordination

Expectations:

- Be clear about what action is needed from the office
- Include job details (job name, address, timing, etc.)
- Flag urgency if timing is critical
- Confirm once requests have been actioned where needed

Office Team Communication Structure

To Individual Field Team Member

Use: WhatsApp individual chat

Used for:

- Direct job instructions or clarifications
- One-on-one follow-ups
- Specific task updates

Expectations:

- Be precise and avoid ambiguity
- Ensure instructions are acknowledged
- Keep communication job-relevant and concise
- Follow up in writing where clarity is important

To All Field Team Members

Use: WhatsApp group chat

Used for:

- General job updates affecting multiple staff
- Scheduling or workflow updates
- Important operational announcements

Expectations:

- Only post information relevant to the whole group
- Avoid unnecessary messaging or clutter
- Ensure clarity. Assume not everyone has context
- Reinforce key updates when action is required

To Management

Use: WhatsApp management group chat

Used for:

- Escalations
- Approval requests
- High-level operational issues
- Urgent business decisions

Expectations:

- Be clear, concise and factual
- Include context and relevant job details
- Flag urgency appropriately
- Use for decisions, not general discussion

To Other Office Staff

Use: Microsoft Teams

Used for:

- Internal office coordination
- Admin workflows
- Scheduling and documentation tasks
- Non-urgent internal communication

Expectations:

- Keep communication structured and organised by topic
- Use channels appropriately (don't mix unrelated topics)
- Maintain clear records for admin processes
- Avoid using Teams for urgent field escalation

Urgent Communication (Call First Rule)

Used for:

- Safety issues (WHS concerns)
- Major delays impacting customers or jobs
- Serious site problems or risks
- Escalations that cannot wait

How to handle it:

- Call immediately when urgent
- Follow up with a message for record keeping
- Never delay urgent communication

Escalation Pathway

If something isn't clear or you're unsure what to do:

1. Speak to the closest relevant person first (on-site or office contact)
2. If still unresolved, escalate to supervisor or business owner
3. If safety-related or urgent, escalate immediately without waiting

The goal is speed and clarity, not hesitation.

Communication Standards

To keep communication effective across the team:

- Be clear and specific (no vague messages)
- Communicate early, not after the fact
- Confirm important information has been received
- Keep messages relevant to the job
- Avoid unnecessary back-and-forth during work hours

What Good Communication Looks Like

Strong communication in action looks like:

- Issues raised before they become problems
- Office updated before customers need to follow up
- Everyone understands job status in real time
- Fewer mistakes, less rework, smoother workflow

The Right Mindset

Good communication is not about talking more.

It's about passing the right information to the right person at the right time.

Team members who communicate well:

- Speak up early when something changes
- Keep information accurate and timely
- Don't assume others already know
- Help keep jobs moving without confusion

If something changes, is unclear or could affect the job, communicate it immediately.

Good communication keeps everything else working.

SECTION 16 – Ready To Start

16.1 Ready To Start & Week 1 Goals – Settling In

INSTRUCTION:

Use this page to guide new team members through their first week in the business.

This page should:

- Focus on orientation, observation and initial setup
- Reinforce that the goal is understanding, not performance
- Cover team introductions, job flow and how the business operates
- Include confirmation of system access and communication channels
- Encourage asking questions and removing hesitation early
- Apply to all roles (Field Team, Office Team, Apprentices)
- Include clear checklist-style goals for each role
- Keep the tone supportive, practical and low-pressure.

This section should answer:
"What is this business and how do things work here?"

EXAMPLE:

Now that you have started with the business and are in your first couple of days, this onboarding is designed to support you as you settle in and begin understanding how everything works.

The first 30 days are about getting comfortable, learning how things operate and building confidence in your role. You are not expected to know everything yet. This is a structured period focused on learning our systems, understanding our standards and getting a feel for how the team works together in real day-to-day operations.

There is no expectation to be fully up to speed immediately. The goal is to set you up properly so you can build confidence step by step, without pressure to already have everything mastered.

Week 1: Settling In

Focus: "How do things work here?"

At this early stage, your focus is simply on understanding your environment and how the business operates.

If you haven't already, you will be introduced to the team and begin learning who does what across the business. You will start to see how jobs move from the office through to the field and then to completion and how each part of the process connects.

You will also be set up on the systems, tools, logins and communication channels you need for your role. From here, you will start to understand where job information comes from and how updates are shared across the team.

A key part of this week is observing experienced team members in real situations so you can see how work is actually carried out day to day.

This stage is intentionally light on pressure. The focus is not on performance, it is on learning, observing and understanding.

You are expected to have questions during this stage and asking them is encouraged.

Week 1 Goals

- ☐ Met the team and understand key roles in the business
- ☐ Received logins and access to required systems
- ☐ Access confirmed to communication channels (WhatsApp / Teams where applicable)
- ☐ Introduced to how jobs are created, scheduled and completed
- ☐ Understand basic expectations around communication and professionalism
- ☐ Comfortable asking questions when unsure

Field Team (Trades & Apprentices)

- ☐ AroFlo access confirmed and visible
- ☐ Understood how job details are received
- ☐ Observed live job setup or work in progress
- ☐ Introduced to basic site expectations and communication flow

Office Team

- ☐ AroFlo admin/scheduling access confirmed
- ☐ Understood job flow from booking to completion
- ☐ Introduced to customer communication process
- ☐ Understood internal communication structure (Teams + WhatsApp usage)

Apprentice

- ☐ Introduced to assigned tradesperson(s)
- ☐ Understood shadowing expectations
- ☐ Observed basic job tasks and site behaviour
- ☐ Awareness of TAFE requirements and role expectations

16.2 Week 2 Goals – Getting Involved

INSTRUCTION:

Use this page to transition team members from observation into active participation.

This page should:

- Focus on getting involved in real work with support
- Reinforce learning through doing, not just watching
- Set expectations around assisting with tasks and using systems
- Normalise mistakes as part of the learning process
- Encourage asking questions and acting on feedback
- Apply to all roles with clear, role-specific checklists
- Keep the tone practical, supportive and focused on progress rather than perfection.

This section should answer:
"How do I start contributing properly in my role?"

EXAMPLE:

Week 2 Goals – Getting Involved

Focus: "How do I contribute properly?"

By now you are starting to settle in and become more familiar with how the business operates day to day.

At this stage, you will begin moving from observation into participation. You will start assisting with real tasks relevant to your role while still being supported by the team.

You will also begin using systems more directly rather than just observing them.

You will start to understand how your role contributes to live jobs, how communication flows between office and field and how work progresses from start to finish.

This stage is about getting involved, building repetition and learning through doing.

Mistakes are expected at this stage. The focus is on learning quickly, asking questions and improving as you go.

Week 2 Goals

- ☐ Contributed to live tasks or work
- ☐ Started using systems more actively
- ☐ Understand basic workflow of your role
- ☐ Received feedback from team members
- ☐ Asked questions and sought clarification

Field Team (Trades & Apprentices)

- ☐ Assisted on-site with tasks
- ☐ Understood job scope more clearly
- ☐ Used AroFlo where required
- ☐ Followed on-site instructions

Office Team

- ☐ Assisted with admin/scheduling tasks
- ☐ Updated or processed job information
- ☐ Supported field communication needs
- ☐ Understood priorities and scheduling flow

Apprentice

- ☐ Actively supporting tradesperson
- ☐ Completing basic hands-on tasks
- ☐ Asking questions during work
- ☐ Showing engagement and effort

16.3 Week 3 Goals – Building Confidence

INSTRUCTION:

Use this page to support the shift from supported learning to increased independence.

This page should:

- Focus on building confidence, consistency and capability
- Reinforce taking on more responsibility with less step-by-step guidance
- Emphasise applying feedback and improving performance
- Introduce expectations around managing workload and priorities
- Encourage consistent communication and reliability
- Apply to all roles with clear progression checklists
- Keep the tone focused, encouraging and performance-oriented without being overwhelming.

This section should answer:
"How do I improve and become confident in my role?"

EXAMPLE:

Week 3 Goals – Building Confidence

Focus: "How do I do this well?"

At this point you should be starting to feel more confident with your role and how things operate.

You will now begin taking on more responsibility with less step-by-step guidance. You will still be supported, but you will be expected to start working more independently and consistently.

This stage is about building confidence through repetition, improving quality and applying feedback in real time.

The focus now shifts from learning how things work to doing them well and consistently.

Week 3 Goals

- ☐ Completing tasks with reduced supervision
- ☐ Applying feedback to improve performance
- ☐ Demonstrating growing confidence
- ☐ Managing workload more effectively
- ☐ Communicating clearly and consistently

Field Team (Trades & Apprentices)

- ☐ Completing job tasks with minimal direction
- ☐ Understanding on-site priorities
- ☐ Using AroFlo consistently where required
- ☐ Improved job awareness and flow

Office Team

- ☐ Managing tasks more independently
- ☐ Accurate system updates
- ☐ Clear communication with field team
- ☐ Handling routine processes confidently

Apprentice

- ☐ Completing tasks with less instruction
- ☐ Supporting tradesperson effectively
- ☐ Showing task awareness
- ☐ Beginning to anticipate next steps

16. 4 Week 4 Goals – Finding Your Rhythm

INSTRUCTION:

Use this page to finalise the first 30 days and transition the team member into consistent, independent performance.

This page should:

- Focus on consistency, reliability and independence
- Reinforce following systems and processes without reminders
- Set expectations around steady performance and accountability
- Include completion of a structured check-in or review
- Position this stage as the transition into normal working expectations
- Apply to all roles with final-stage checklists
- Keep the tone clear, confident and forward-looking.

This section should answer:
"Am I now performing consistently and ready to operate in my role?"

EXAMPLE:

Week 4 Goals – Finding Your Rhythm

Focus: "How do I perform consistently?"

By this stage, you should be settling into your role and operating with increasing independence.

The focus now is consistency. Showing that you can reliably follow systems, communicate clearly and perform your role without constant direction.

This is about proving you can apply what you have learned consistently, not just occasionally.

At the end of this week, you will also complete your first structured check-in with leadership to review how you are tracking.

Week 4 Goals

- ☐ Working more independently
- ☐ Demonstrating consistent performance
- ☐ Following systems without reminders
- ☐ Communicating clearly and reliably
- ☐ Completed first formal check-in

Field Team (Trades & Apprentices)

- ☐ Managing job tasks independently
- ☐ Consistent AroFlo updates
- ☐ Reliable on-site performance
- ☐ Confident job execution

Office Team

- ☐ Managing core responsibilities independently
- ☐ Accurate and consistent system use
- ☐ Strong communication flow
- ☐ Supporting field efficiently

Apprentice

- ☐ Performing tasks with growing independence
- ☐ Reliable support to tradesperson
- ☐ Consistent effort and engagement
- ☐ Clear progression in capability

Onboarding & Training Guide Acknowledgement

INSTRUCTION:

Use this page to confirm that a new team member has completed their onboarding and training requirements and understands the standards, systems and expectations of the business.

This page should:

- Act as the final acknowledgement page of the onboarding process
- Require the team member to confirm they have read and understood all sections of the guide
- Provide a simple checklist covering each major onboarding section
- Reinforce that it is the employee's responsibility to seek clarification if anything is unclear
- Include employee sign-off and date completed
- Include manager or team leader sign-off confirming onboarding has been completed
- Create a clear record that onboarding has been delivered and acknowledged
- Apply to all roles within the business (field staff, apprentices and office staff)
- Be retained as part of the employee's personnel records

Keep the tone professional, practical and straightforward.

This section should answer:

"Has the team member completed onboarding and acknowledged their understanding of how the business operates?"

EXAMPLE:

Onboarding & Training Guide Acknowledgement

I, _____ (please print full name), acknowledge that I have been provided with access to and have completed the ABC Trade Business Onboarding & Training Guide.

I understand that this guide outlines the expectations, standards, systems, processes, policies and responsibilities that apply to my role within the business.

By signing below, I confirm that I have read, understood and completed all sections of the guide listed below. I understand that if I am unsure about any information contained within this guide, it is my responsibility to seek clarification from my manager or team leader.

I acknowledge that compliance with the standards and expectations outlined in this guide forms part of my employment responsibilities.

Employee Name: _____

Signature: _____

Date: _____

Onboarding & Training Guide Completion Checklist

Please tick each section once completed.

- ☐ Welcome To ABC Trade Business
- ☐ Who We Are & How We Operate
- ☐ Getting To Know The Team
- ☐ The Way We Work
- ☐ Roles, Expectations & Accountability
- ☐ Systems That Run The Business
- ☐ Getting Work Done (Day-to-Day Operations)
- ☐ Tools, Equipment & Resources
- ☐ Customer Experience Standards
- ☐ Safety, Risk & Responsibility
- ☐ Money, Jobs & Performance
- ☐ Personal Responsibilities
- ☐ Technology & Security Basics
- ☐ Growth & Development Pathways
- ☐ Support & Escalation
- ☐ Ready To Start

Manager / Team Leader Sign-Off

I confirm that the above team member has completed the ABC Trade Business Onboarding & Training Guide and has been given the opportunity to ask questions and seek clarification where required.

Manager Name: _____

Signature: _____

Date: _____


lifestyle
TRADIE
the freedom to choose!