

# SYSTEMS - Working Session

Systems prevent errors, scale performance & replicate results

Systems run the business

People run the systems

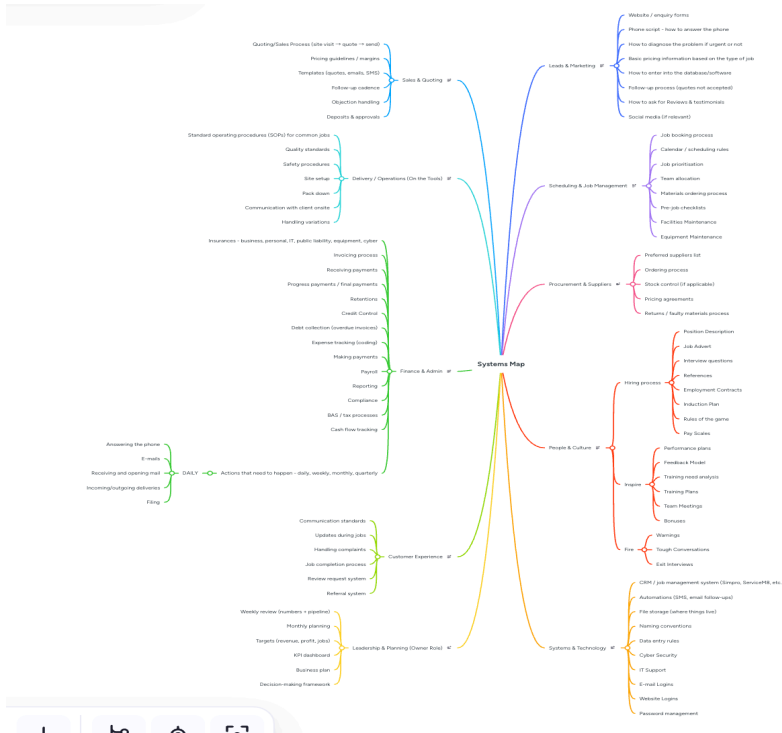
You lead the people

## Identify Systems

Departments --> Folders --> How to

- Leads & Marketing – Attract
- Sales & Quoting – Convert
- Scheduling & Job Management – Plan
- Operations / Service Delivery – Do
- Procurement & Suppliers – Buy the Materials
- Finance & Administration – Manage the Money
- People & HR – Manage the Team
- Customer Experience – Look After the Client
- Systems & Technology – Run the Systems
- Leadership & Planning – Run the Business

<https://www.mindmeister.com>



# 1. Leads & Marketing

How work comes in

- Website / enquiry forms
- Phone script - how to answer the phone
- How to diagnose the problem if urgent or not
- Basic pricing information based on the type of job
- How to enter into the database/software
- Follow-up process (quotes not accepted)
- How to ask for Reviews & testimonials
- Social media (if relevant)

*System outcome:* consistent flow of enquiries

# 2. Sales & Quoting

How you turn enquiries into jobs

- Quoting/Sales Process (site visit → quote → send)
- Pricing guidelines / margins
- Templates (quotes, emails, SMS)
- Follow-up cadence
- Objection handling
- Deposits & approvals

*System outcome:* higher conversion + better pricing

# 3. Scheduling & Job Management

How work gets organised

- Job booking process
- Calendar / scheduling rules
- Job prioritisation
- Team allocation
- Materials ordering process
- Pre-job checklists
- Facilities Maintenance
- Equipment Maintenance

*System outcome:* smooth workflow, less firefighting

# 4. Delivery / Operations (On the Tools)

How the work is actually done

- Standard operating procedures (SOPs) for common jobs
- Quality standards
- Safety procedures
- Site setup
- Pack down
- Communication with client onsite
- Handling variations

*System outcome:* consistent quality + fewer mistakes

# 5. Procurement & Suppliers

How materials and inputs are managed

- Preferred suppliers list
- Ordering process
- Stock control (if applicable)
- Pricing agreements
- Returns / faulty materials process

**System outcome:** cost control + fewer delays

## 6. Finance & Admin

**How money and paperwork is handled**

- Insurances - business, personal, IT, public liability, equipment, cyber
- Invoicing process
- Receiving payments
- Progress payments / final payments
- Retentions
- Credit Control
- Debt collection (overdue invoices)
  
- Expense tracking (coding)
- Making payments
- Payroll
- Reporting
- Compliance
- BAS / tax processes
- Cash flow tracking
- Actions that need to happen - daily, weekly, monthly, quarterly
  - DAILY
    - Answering the phone
    - E-mails
    - Receiving and opening mail
    - Incoming/outgoing deliveries
    - Filing

**System outcome:** minimise leaks so there is cash in the bank, no surprises

## 7. People & Culture

**How the team is managed**

- Hiring process
  - Position Description
  - Job Advert
  - Interview questions
  - References
  - Employment Contracts
  - Induction Plan
  - Rules of the game
  - Pay Scales
- Inspire
  - Performance plans
  - Feedback Model
  - Training need analysis
  - Training Plans
  - Team Meetings
  - Bonuses
- Fire
  - Warnings
  - Tough Conversations

- o Tough Conversations
- o Exit Interviews

**System outcome:** reliable team, less babysitting

## 8. Customer Experience

How clients feel about working with you

- Communication standards
- Updates during jobs
- Handling complaints
- Job completion process
- Review request system
- Referral system

**System outcome:** repeat work + referrals

## 9. Systems & Technology

What tools run the business

- CRM / job management system (Simpro, ServiceM8, etc.)
- Automations (SMS, email follow-ups)
- File storage (where things live)
- Naming conventions
- Data entry rules
- Cyber Security
- IT Support
- E-mail Logins
- Website Logins
- Password management

**System outcome:** less admin, more control

## 10. Leadership & Planning (Owner Role)

Where most small to medium businesses fall over

- Weekly review (numbers + pipeline)
- Monthly planning
- Targets (revenue, profit, jobs)
- KPI dashboard
- Business plan
- Decision-making framework

**System outcome:** owner acting like a CEO, not just a technician

## OTHER EXAMPLES



