

Initial 90 Day Action Plan

Before we start working on your marketing activities, it is extremely important that we work through the following areas of your business, to ensure that you have a solid foundation upon which to grow your business. This process usually takes around 90 days, depending on what you already have in place, and the amount of time and effort you are able to put into doing what needs to be done.

1. **Test and Measure** - Implement testing and measuring systems on lead generation, conversion rate, average dollar sale and # transactions. We need to assess the following

- ☐ Where / how your customers find out about you
- ☐ How many you convert to customers
- ☐ The average \$ spend
- ☐ How much profit you make on each job / sale

This will lead to phone and sales scripts, checklists and the creation of a database profile for all jobs and customers.

2. **Review P&L / Cashflow and Set Sales and Profit Targets**

As business is about making a profit, and given that your financials are basically the determining factor in how well your business is performing, we take a look at the following:-

- ☐ Adequacy and accuracy of current financial data and accounting systems.
- ☐ Current profit and cashflow position of the business, and any challenges currently being faced.
- ☐ Set some targets for the coming 12 months, along with budgets and incentives which will be challenging to win, yet achievable for you and your team. Any team incentives will be set for 6 months to assist with managing your cashflow.

3. **Organisation Structure and Team Members**

We need to assess the rules and responsibilities for your whole team. This will allow your team to have clear direction of what is expected of them, and should free up your time to work on your business. We will need to look at the following

- ☐ Document your company organisational structure, not only for how it is organised now, but also how it will need to look in 12 months, when your business is where you want it to be.
- ☐ Developing a job description for each team member. It is a great idea for each of your team members to work on and develop their own with you.
- ☐ Review each job description and complete a Human Job Analysis (HJA) to determine the most effective DiSC personality profile for the incumbent.
- ☐ Complete a DiSC personality profile for each employee, and review against their position HJA to identify opportunities for improvement.

4. **Develop and Print Company's Vision / Mission Statement**

Write out why you are in business, and your own personal standards. Include a summary of your ethics, and an outline of how you deal with customers. Then give it to every team member – It will help to get them motivated, and will give them direction and focus.

Have your mission statement mounted, and hang it in clear view of your customers, this way you will have the chance to demonstrate your high level of professionalism.