## TRADE & CONSTRUCTION BUSINESSES

## YOUR BUSINESS PLAYBOOK

## Grow and make your Business more Efficient

Business Tools (Apps) & Strategies that will assist your Business
Outcomes: Create efficiencies, scale up with more jobs and less PAPER work

If you have been thinking about how to scale up your business to create more capacity to take on more jobs, you want to decrease the paperwork administration and would like to get more time to spend with your family/friends and enjoy your other passions, then see John's story below on what he did with his Plumbing business.

| Plumber – Johns Plumbing | |
|---|---|
| Before Systemising his Business | After Systemising his Business |
|  |  |

Full story of how Business Tools have systemised John's Plumbing business. John's Story - Video

# Overview of how to start growing and systemising your Business



1. Profile Your Business

2. What is your Goal/s

3. What is your Job Type:
   a. Job-Based or
   b. Project-Based

4. Based on your Job Type, what does your business need

## 1. Create a Profile of your Business

| Question | Details | Your Reply |
|---|---|---|
| Goal/s | *What is the business trying to achieve over the short and long-term? Do they want to increase efficiency, grow the business, or both?* | |
| Pain Points | *Is your business looking to address specific problems within the business?*<br><br>*(eg Customers slipping through the cracks, difficult to schedule staff with manual systems, staff turning up late to appointments, customers paying their invoices late etc)* | |
| Number of Employees | *How many employees does the business have? Are you looking to grow the employee numbers or stay the same?* | |
| Job Type | *Does your business undertake mainly smaller high-frequency jobs (Job-Based), or larger project-based jobs that take longer to complete (Project-Based)?* | |
| Current Tools | *What Accounting Package are you using? What Apps are you using in your business today, if any?* | |
| Technology Proficiency | *How experienced are you and your team with using apps and other software?* | |

## 2. Goal/s

Your Goal/s for the business will be either around creating just efficiencies or efficiency and growth.

See points below on Goal/s:

| Only Efficiency | Efficiency & Growth |
|---|---|
| Happy with size and/or revenue levels, but like to run the business more efficiently.<br><br>Want to streamline the operations so you can improve work-life balance, or spend less time on paperwork and more time on the job. | Focused on growth.<br><br>Might want to take on more staff, grow revenue, increase size or the quantity of jobs, but to achieve this, efficiency is crucial. |

## 3. Job-Type

Depending on Job Type of business, whether it is **Job-Based** or **Project-Based**, the business will have different requirements and needs.

See table below that shows some characteristics of the two Job Types:

| Job-Based | Project-Type |
|---|---|
| Main business focus is on high volume work. | Have fewer customers, but the scale and complexity of each job is much larger. |
| Success is defined by managing several jobs at the same time. | Success means delivering project efficiently and profitably. |
| Often operating out of their work van/ute between jobs (that is until they get home to do the admin). | Often have complex payment structures, such as progress payments and subcontractor payments. |

## 4. What does your Business need – <mark>Job Based Business</mark>

| JOB BASED BUSINESS | | | | | Accountant's Role | App stack recommendations for your business | |
|---|---|---|---|---|---|---|---|
| Growth ambitions | Goal/s | Current Size<br><br>Staff # | Job Volume | Admin Staff Resource | What your Accountant can assist with | Accounting Software App | Type of App |
| Low (stay the same) | Efficiency | < 3 | Low | No | Accounting, Bookkeeping, Business Advisory, Business Strategic Planning. | Xero Business Edition (includes Xero Payroll) | Job management App<br><br>Payment Service App |
| Low (stay the same) | Efficiency | 1 - 5 | Medium | No | Accounting, Bookkeeping, Business Advisory, Business Strategic Planning | Xero Business Edition (includes Xero Payroll) | Job management App<br><br>Payment Service App |
| High (rapid growth) | Efficiency & Growth | 5+ | Medium | No | Accounting, Bookkeeping, Business Advisory, Business Strategic Planning | Xero Business Edition (includes Xero Payroll) | Job management App<br><br>Payment Service App |
| High (rapid growth) | Efficiency & Growth | 10+ | High | Yes | Accounting, Bookkeeping, Business Advisory, Business Strategic Planning | Xero Business Edition (includes Xero Payroll) | Job management App<br><br>Payment Service App |

Selecting the right Apps for your business

- Streamlining Accounting & Bookkeeping

    **Xero Business Edition (includes Xero Payroll)**
    o Run the business on the go:
        Use the mobile app to reconcile, send invoices, or create expense claims from anywhere.
    o Get paid faster with online invoicing:
        Create professional recurring invoices and receive updates when they're opened.
    o Get an up-to-date view of cash flow anytime:
        See how things are going with Xero's easy-to-use online dashboard.
    o Simplify payroll:
        Save time and increase productivity. Payroll in Xero brings pay and financial information together in one place.

- Gain Efficiency and/or Grow

    **Job Management Apps**
    o Save hours of admin by quoting, billing and keeping track of payments from a mobile phone.
    o Automatically sync each job directly with Xero.
    o Manage the workforce smartly with easy employee scheduling and tracking.
    o Stay on top of each job, from quote to finish.

        See one of the Industry Leading Job Management Apps for Job Based Businesses

        [ServiceM8](#) - Video Overview

    **Payment Services Apps**
    o Improve cash flow, receive payments anywhere, and allow customers to pay online.

    **HR Management Apps**
    o Seamlessly manage the workforce, including training and availability scheduling, in one place.

    **CRM Apps**
    o Grow the business by managing every customer and lead. Track leads, view proposals and see the sales pipeline in one place.

Below are some Trade Business Stories of their approach to starting the process of growing and making their business more efficient.

# BUSINESS STORIES

## 1. Trade Business Story – <mark>Job-Based Business</mark>
### Goal - Efficiency

**Meet Ben**

Ben is the owner of a small electrical business, which uses Xero Business Edition.

While he's happy with the way his business is going, he's struggling with the paperwork. He's also getting really frustrated by the team missing or being late for appointments and not operating as efficiently as it could. He's fairly savvy with technology, but it's essential that any app is not only easy for his staff to pick up, but can be used on the road.

Apps Ben Implemented in his Electrical Business

Since using Xero, Ben has experienced time-saving benefits. Now he's motivated to invest in a good Job Management System to reach his goals.

Accounting System:
Xero Business Edition (includes Xero Payroll)

Ben met with his Accountant to seek guidance and explore Job Management Apps to suit Ben's business goal and needs.

Job Management System Implemented: ServiceM8

| Business Profile | |
|---|---|
| Goal/s | To spend more time at home. |
| Pain Points | Time-consuming paperwork and running behind schedule |
| Number of Employees | 5 |
| Job Type | Job Based - <20 jobs per month |
| Current Tools | Xero Business Edition |
| Technology Proficiency | High |

**Achieving Ben's goal: Efficiency**

Get efficient with **Job Management**
- Save hours of admin by quoting as he goes, on the move.
- Stay on top of each job, from quote to finish.
- Access all price lists from a single and easy-to-use location.
- Reconcile all job activity easily with Xero.

| | **ServiceM8** |
|---|---|
| Type and availabilty | Job management app<br>NZ, AU, UK, US, CA, SA, SGP, HK, MY |
| Onboarding and support | ✔ Automatic Xero contact upload<br>✔ Training available by authorised partner*<br>✔ Online help centre and email support |
| Overview | A great solution for clients with growing service-based job volumes such as HVAC and cleaning |
| **App features** | |
| Quoting/invoicing | ✔ |
| Xero invoice sync | ✔ |
| Task management | ✔ |
| Health & safety certification | |
| Inventory price list | Upload |
| Direct supplier payment | |
| Mobile app | iOS only |
| Geo location tracking | ✔ |
| Pipeline management | ✔ |
| Staff scheduling & communication | ✔ |
| Client communications | ✔ |
| On-site payment services | ✔* |
| Customisation available | |
| Office management functionality | |
| Back costing | |
| Advanced financial reporting | |
| | Find out more about **ServiceM8** |

*Available at additional charge

**Why Xero Business Edition suits Ben's business?**

- Has a single view of business operations, including invoicing.
- He uses Xero's mobile app to do admin on the move.
- Able to improve cash flow by checking and chasing payments at the touch of a button.

**Why ServiceM8 suits Ben's Business?**

- Organisation at pace
  ServiceM8 is excellent for high-volume, quick turnaround jobs.
- Designed for cash flow
  Can use the integrated payment features to achieve cash flow improvements.
- Affordable
  The pricing model provides scalable charging, allowing a more advanced system without a high fixed cost (or contract).

**Value proposition: Xero + ServiceM8**

Here are the benefits of ServiceM8 and Xero Business Edition for Ben:

- All but eliminate out of hours work.
  Can quote, schedule, track a job, invoice and even chase payments on the move.
- View the entire business operations in ServiceM8.
  Able to get the information needed about jobs and work schedule in one place, without manual entry.
- Keep on top of staff management with everything from day-to-day schedules, job locations and even payroll.
- Better visibility for the Accountant who can view up-to-date data on the dashboards and in reports thanks to the integration of ServiceM8 with Xero.
- Clear and easy to understand summaries of job profitability, staff schedules and job status at the touch of a button.

**Apps Lisa Implemented in her Property Maintenance Business**

Accounting System: Xero Business Edition (includes Xero Payroll)

Job Management System Implemented: ServiceM8

### Meet Lisa

Lisa has built a successful property maintenance business.
She specialises in low-cost, fast-turnaround jobs. She plans to expand and take on extra staff to service a larger territory.

Although Lisa is able to effectively manage her small team by splitting her time between taking on overflow work and the office, she's well aware the more time she and the team spend on administration, the less time they have for taking on jobs.

In order to take her business to the next level and train two apprentices, Lisa is looking for a way to make sure she's getting the best possible return from each hour of the day.

| Business Profile | |
|---|---|
| Goal/s | Spend time in the most productive way.<br><br>Grow the business |
| Pain Points | Too much time on admin and not enough time on the job |
| Number of Employees | 3 |
| Job Type | Job Based - 50 jobs per month |
| Current Tools | Xero Business Edition |
| Technology Proficiency | Moderate |

### Achieving Lisa's goal: Efficiency & Growth

Get efficient with **Job Management**
- Save hours of admin by quoting as she goes, on the move.
- Stay on top of each job, from quote to finish.
- Take payments immediately with online payments.
- Reconcile all job activity easily with Xero.

| | **serviceM8** |
|---|---|
| **Type and availabilty** | Job management app<br>NZ, AU, UK, US, CA, SA, SGP, HK, MY |
| **Onboarding and support** | ✔ Automatic Xero contact upload<br>✔ Training available by authorised partner*<br>✔ Online help centre and email support |
| **Overview** | A great solution for clients with growing service-based job volumes such as HVAC and cleaning |
| | **App features** |
| **Quoting/invoicing** | ✔ |
| **Xero invoice sync** | ✔ |
| **Task management** | ✔ |
| **Health & safety certification** | |
| **Inventory price list** | Upload |
| **Direct supplier payment** | |
| **Mobile app** | iOS only |
| **Geo location tracking** | ✔ |
| **Pipeline management** | ✔ |
| **Staff scheduling & communication** | ✔ |
| **Client communications** | ✔ |
| **On-site payment services** | ✔* |
| **Customisation available** | |
| **Office management functionality** | |
| **Back costing** | |
| **Advanced financial reporting** | |
| | Find out more about **ServiceM8** |

*Available at additional charge

### Why Xero Business Edition suits Lisa's business?

- She can use Xero's mobile app to reconcile and send invoices from anywhere so it stops consuming most of her time.
- Able to improve cash flow by checking and chasing payments at the touch of a button.
- She can save time and increase productivity with payroll in Xero and organise all her business information in one place.

### Why ServiceM8 suits Lisa's Business?

- **Organisation at pace**
  ServiceM8 is excellent for high-volume, quick turnaround jobs.
- **Designed for cash flow**
  Lisa can use the integrated payment Features to achieve cash flow improvements.
- **Affordable**
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**List of some Job Based trades businesses that will benefit from the Apps and Strategies:**

- Air conditioning specialists
- Audio visual technicians
- Carpenters
- Carpet layers
- Electricians
- Fire and security workers
- Glaziers
- Insulation services
- Landscapers

- Locksmith
- Plasterers
- Plumbers
- Pool service professionals
- Roofers
- Scaffolders
- Structural steel specialists
- Technicians
- Tilers


Other Job-Type Trade Businesses using ServiceM8 for their Job Management System:
- [Electrician](#) (Residential)
- [Electrician](#) (Residential, Commercial and Industrial)


If you would like guidance on taking the next step of growing and systemising your business please contact Luis Aleixo. We offer a free complimentary catch up over a coffee to learn about your business goals, aspirations and how we can assist you on your journey.

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