

- **Administration System** - to produce efficiency, quality control, outstanding customer service
 - ◇ General Office Operation (opening, closing, mail, calls, scheduling, filing, cleaning, etc.)
 - ◇ Bookkeeping/Accounting (ledger/reporting, A/P, A/R-collections, invoicing, deposits, merchant services, etc.)
 - ◇ Payroll Administration
 - ◇ Technology (computers, phones, office equipment, mobile, etc.)
 - ◇ Data Base Management (may be handled as part of marketing)
 - ◇ Inventory Control/Supply Chain Management
 - ◇ Property/Capital Equipment
 - ◇ Compliance (legal, taxes, licenses/permits, insurances, etc.)
- **Fulfillment/Delivery** of our Services - to consistently and predictably deliver on our promise; to produce a high level of customer satisfaction
 - ◇ All Services and Operational Procedures (defines “our way”)
 - ◇ Checklist
 - ◇ Quality Control/Customer Satisfaction Process
 - ◇ Continuous Improvement Process
- **Selling System** - to produce the volume of sales that are desired each day/week/month
 - ◇ Documented Sales Process (Pipeline)
 - ◇ Documented Selling Conversation(s) - Scripts (Inside & Outside Sales); Questions; etc.
 - ◇ Presentation Materials Ready/Proposal Process (Template)
 - ◇ Contracting and/or Payment Process Documented
- **Marketing System** - to produce the volume of leads/prospects/calls/etc. that are needed to fill the pipeline for sales; measured by day/week/month
 - ◇ Marketing Plan for **each** Target Customer (Includes description of ideal customer, U.S.P./message, top 5-10 marketing mediums, a marketing calendar, a marketing dashboard for tracking)
 - ◇ CRM System & Process (Data Management)
 - ◇ Pricing Strategy Documented
 - ◇ Overall Marketing Message and Brand Manifesto
 - ◇ Marketing Tools and Collateral (Branded)
- **Human Resources System** - to produce a highly motivated & effective team
 - ◇ Talent Acquisition Process (need identification, recruitment, hiring)
 - ◇ Onboarding Process (employee handbook review, office ops, security, operations, safety, initial training, etc.)
 - ◇ Compensation & Rewards
 - ◇ Performance Management
 - ◇ Job Description
 - ◇ Goal-Setting and/or KPI's
 - ◇ Evaluations & Appraisal
 - ◇ Training & Talent Development (systems, culture, leadership, safety, professional development, etc.)
 - ◇ Coaching & Correction
 - ◇ Conflict Resolution Process
 - ◇ Severance Process (resignation, termination, death, or disability)
 - ◇ Compliance (Employee Handbook, Labor Law Postings, Regulatory Communications, etc.)
 - ◇ Administration (managing all necessary documentation, benefit enrollments, etc. - may be Administration)
- **Annual Growth Planning & Review Process**— we have one in place
- **Annual Growth Plan** (Components: Budget, Marketing Plan, Operational Plan, Improvement Goals)
- **Comprehensive Operations Manual**—we have one in place, updated annually