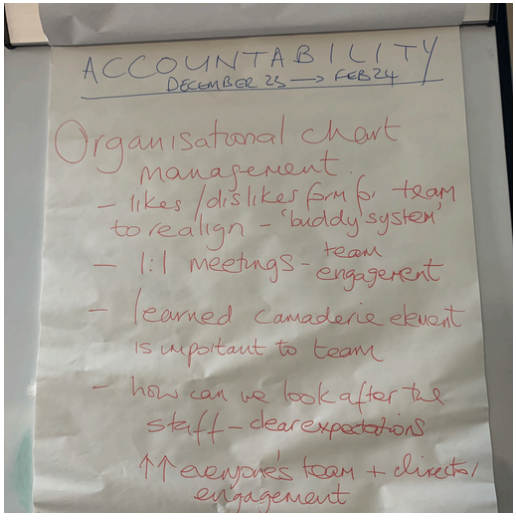
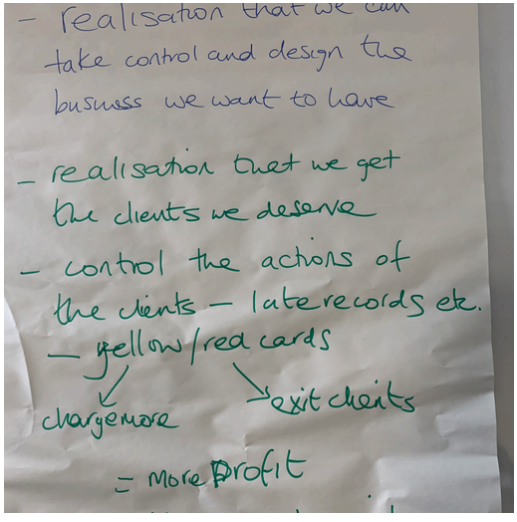


ACCOUNTABILITY
DECEMBER 23 → FEB 24

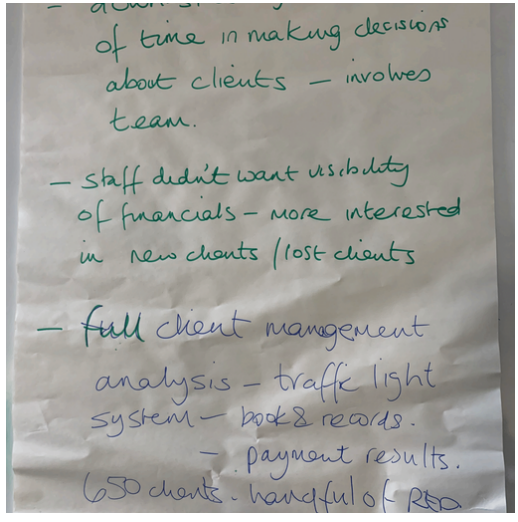
Organisational chart management
- likes / dislikes form for team to realign - 'buddy' system
- 1:1 meetings - team engagement
- learned camaderie ekuent is important to team
- how can we look after the staff - clear expectations

↑↑ everyone's team + clients / engagement



- realisation that we can take control and design the business we want to have
- realisation that we get the clients we deserve
- control the actions of the clients - late records etc.
- yellow/red cards
  - → charge more
  - → exit clients

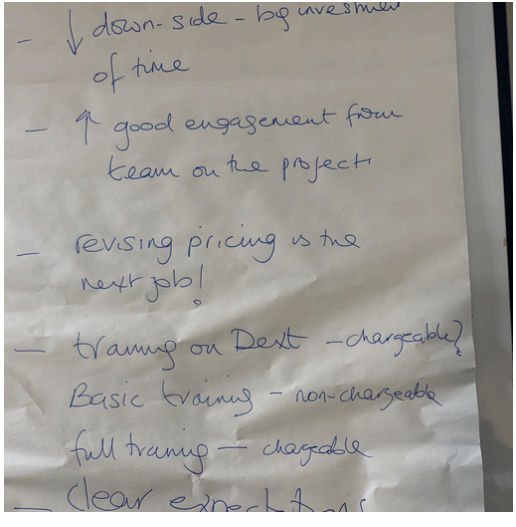
= more profit



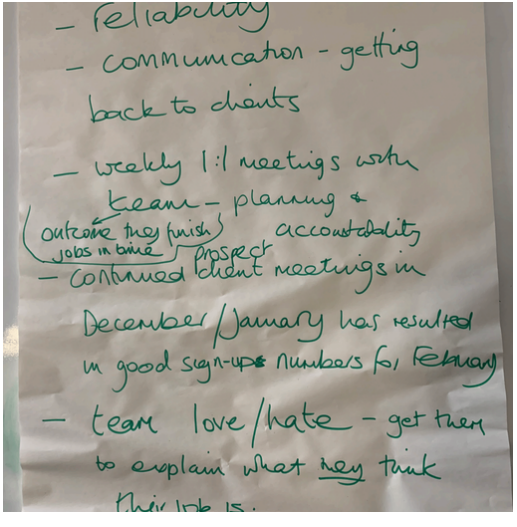
of time in making decisions about clients - involves team.

- staff didn't want visibility of financials - more interested in new clients / lost clients
- full client management analysis - traffic light system - book & records.
  - payment results.

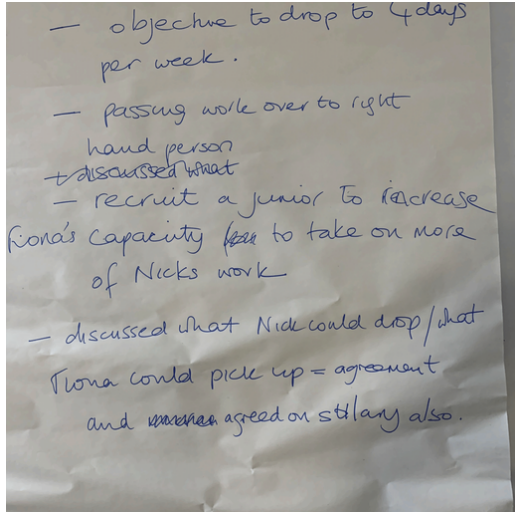
650 clients - handful of RED



- ↓ down-side - big investment of time
- ↑ good engagement from team on the project
- revising pricing is the next job!
- training on Dext - chargeable?
  Basic training - non-chargeable
  full training - chargeable
- clear expectations



- reliability
- communication - getting back to clients
- weekly 1:1 meetings with team - planning & accountability
  (outcome they finish jobs in time; prospect)
- continued client meetings in December / January has resulted in good sign-up numbers for February
- team love/hate - get them to explain what they think their job is



- objective to drop to 4 days per week.
- passing work over to right hand person + discussed what
- recruit a junior to increase Fiona's capacity to take on more of Nicks work
- discussed what Nick could drop / what Fiona could pick up = agreement and ~~manager~~ agreed on salary also.