

## WHAT DID YOU TACKLE?

GOT RID OF 3 TOXIC PEOPLE  
3-TIER PRICING  
RECRUITMENT  
SOME WORKFLOW AUTOMATION

Pareto analysis of client lists.

Outsourcing

Finally moving into automation  
Xero/hubdoc

Implemented PI for new clients

Developed new brochure

Upskilled team members  
- all were 'number 2s'

Definitive client list RAG on  
bigger clients  
'Love doing' conversations with team

RAG process under way.

Price increases

Restructuring team - lots of  
Paul's time to train <sup>new</sup> skills

Want to recruit apprentice  
- client manager?

Senior management job role analysis  
'love doing'

Cash-flow.

RAG exercise - monitoring  
client behaviour/status  
at end of job.

Weekly meeting driving action - workflows

Empowering team to send out reviews

## WHAT DID YOU LEARN?

TACKLE TOXIC PEOPLE FAST!  
LESS WORK FOR MORE MONEY

Using a consistent fee matrix

Use new 'blue' branding to  
introduce new ways of working

Enthusiasm of team members  
- keen to learn - motivation

Read e-myth again!  
Michael Gerber

Recruit personality most important

Learnt

Keep looking at what you doing  
and questioning why.

The value of getting rid  
of bad clients  
- impact on team

You can trust yourself  
& your team