**Example of “Key business practices”**

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| **AREA** | **PRACTICES** | **FREQUENCY** | **WHO** |
| Financial | * Monthly cashflow plan
 | Review Weekly |  |
|  | * Sales forecast (monthly/annual)
 | Review weekly |  |
|  | * Review debtors/creditors
 | Bi-weekly |  |
|  | * Pay wages/suppliers
 | Weekly |  |
|  | * BAS, PAYG and super each month
 | Monthly |  |
|  | * Review P&L, BS & bank balance
 | Monthly |  |
|  | * Report on financial KPIs
 | Monthly |  |
|  | * Instalment Activity Statement
 | Quarterly |  |
|  | * Workers’ compensation insurance
 | Annually |  |
| Planning | * Prepare business plan
 | Annually |  |
|  | * Review plan/deliverables/measure
 | Monthly |  |
|  | * Strategic review
 | Quarterly |  |
| Marketing | * Marketing Plan
 | Annually (create) |  |
|  | * Review performance
 | Monthly |  |
| Sales | * Sales pipeline
 | Monthly |  |
| HR | * Letters, job descriptions and induction
 | As required |  |
|  | * Training plans
 | Annually (create)Quarterly (review) |  |
| Communication | * Team meeting
 | Weekly |  |
|  | * Coffee catchups – one-on-ones
 | Monthly |  |
| Social | * Social celebrations
 | Quarterly |  |
| Capacity planning | * Create plan
* Update/review
 | MonthlyWeekly |  |
| Services | * Update marketing services templates
 | As required |  |
| Client Care | * Management marketing meetings
 | Monthly |  |
|  | * Monthly report on performance
 | Monthly |  |
|  | * Weekly status updates
 | Weekly |  |
|  | * Quarterly review of marketing plans
 | Quarterly |  |
|  | * Project debriefs
 | Project end |  |
|  | * Annual client survey
 | Annually |  |
|  | * Phone check-ins by M.D.
 | Monthly |  |
|  | * Document management system
 | Annually  |  |
|  | * Authority to spend
 | Annually |  |
|  | * IT backups
 | Monthly |  |
| Insurances | * Review insurances
 | Annually |  |
| Sustainability | * Sustainability Policy
* Environmental Management System
 | Quarterly |  |
| Risk plan | * Review/update risk plan
 | Annually |  |