**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 | Monthly  Weekly |  |
| 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 |  |