

1. Templates

You will have received several templates when you purchased your Business-In-A-Box package however wherever possible you should create new templates for each document you use – whether frequently used or once a while.

Try to systemize each aspect of the business as much as possible as this will save you repetition work.

An example is saying you send email quotes – you could create a template for the cover letter – then all you have to do is change the clients name, address and the quoted price.

Templates are housed in folders and included in your business-in-a-box kit are:-

Folder	Template
Admin	Invoice Template Generic
	Job Description Templates
	Daily Duties – Office Admin
Business Dashboard	CAC-LTV – Lifetime Value Of client Calculator
	Weekly Schedule
	Weekly Snapshot – KPI – Key Performance Indicators
Business Planning	Business Start-up Checklist
	Business Plan Template
	Business Health Checklist
	Prepare Your Business Checklist
Client Fulfilment	Excel Manual Customer Database
	Customer Acquisition Calculator
	Customer Survey Sample
Day To Day	Daily Sales Sheet Retail Products Excel
	Daily Sales Sheet Services
	Daily, Weekly & Monthly Time Tracking Log Excel
	Daily Planner JPEG

	Daily Planner Excel
	Weekly Task List Excel
	Do To List
	Weekly Planner – 5 Weeks Excel
	Weekly Task List – Self and/or Employee
Finance	12 Months Cashflow Forecast Excel
	Accounts Receivable Aging Workbook
	Bank Reconciliation Ledger
	Accounts Receivable Template Day To Day Excel
	Accounts Payable Template Day To Day Excel
	Bank Reconciliation Template Daily
	Personal Budgeting & Banking Template with Example Excel
	Cash Book Monthly with Daily Entries Excel
	Cash Flow Forecast Excel
	Cash Receipts Template Excel
	Simple Business Mileage Log Excel
	Sales Invoice Service Template Excel
	Bill Payment Schedule Excel
	ETF Direct Deposit Form
	Profit & Loss with Cash Flow Yearly Template Excel
	Income & Expense Pivot Tables Excel
	Service business Job Costing Template Calculator Excel
	Profit Projection Forecast 3 Years Excel
	Schedule Budgeting Projection Per Item with Example of Pizza Busi
	Service/Project Coasting Template with Example Cafe
	Start-up Cost Template PDF
	The Small business Accounting Checklist
	Balance Sheet Template Excel
General	Customize these templates to suit your business – they are examples of procedures that you would need for your business
	Car Cleaning Procedures Checklist For Car Detailing Business
	Auto Detailing Checklist For Car Detailing Business
	Landscaping Contract Form
	Lawn Maintenance Invoice
	Lawn Mowing Procedures Checklist For Crew
	Lawn Mowing Equipment Checklist
	Lawn Services Business Estimate Quote Template
	Residential Cleaning Checklist

	Social Media Checklist For Small Businesses
Human Resources HR	
	Employment Recruitment Procedure Overview
	Time Sheet Template
	Training Attendance Form
	Employee Standard Letter Of Employment
	Blank Roster Sheet
	Contract Of Employment Template
	Disciplinary Interview Record
	Employee Details Form
	Employment Application Form
	Employee Induction Overview with Restaurant Example
	Termination Checklist
	Uniform Issue Form
	Incentive Program with Nett Profit Calculator Template
	Incentives Calculator Excel
	Job Description Template
	Applicant Information Release Form
	Applicant Rejection Form
	Employee Meeting Coaching Template
	Disciplinary Notice Form
	Job Applicant Interview Script
	Job Description Template for Hiring New Employees
	New Employee Checklist
Management	Break Even Analysis
	Break Even with Projections Worksheet – Restaurant Example
	Cashflow Template
	Calculating Hourly Charge Rates For Your Business
	Employee Meeting Coaching Template
	Detailed Leads Tracker Excel
	Disciplinary Notice Form
	Employee Attendance Record
	Employment Reference Phone Script
	Exit Interview Checklist with Script
	Hourly Rate Calculation Sheet Excel
	Calculate Employee Turnover Rates Worksheet Excel
	Ideal Schedule Management excel

	Job Requirements Checklist
	Leave of Absence Request Form
	Marketing Activity Planner
	Marketing & Business Planning Guide and Worksheet
	Promotion Tracker – Restaurant Example
	Promotion Record for KPI
	Non – Negotiable Time Evaluation Management Excel
	Time Management Tool – Tracking Time Wasters
	On-The-Job Training Chart
	Management Weekly Cash Flow Analysis
Marketing	\$\$\$ Voucher Template
	Competitor Analysis
	Marketing Campaign Break-Even Analysis
	Headline Test Tally Sheet
	Calls To Make Planner & Tracker
	Gift Certificate Voucher Template
	Detailed Lead Tracker
	Direct Mail Analysis
	Doorhanger, Flier Planning Worksheet
	VIP Member Mailing Data Card Template
	Marketing Activity Planner Excel
	Detailed Marketing Calendar Worksheet Wall Planner Excel
	Monthly Special Template with Example
	Phone Scripts for Reaching Out to New Commercial Cleaning Clients – Example – Please Contact www.businessgrowthclub.com.au to custom design your sales script
	Press Release Template
	Customer referral Card Template
	Referral Program Email Invitation Template
	Referral Script
	Template Flyer with Tear Off with Example
	Weekly Marketing Assignments Schedule
Personal Development	
	Your Twelve Month Goals ... Business
	Blank Time Log Template Time Management

	Diary Of Self
	24-Hour Activity Log Template
	Action Plan Worksheet
	Daily Planner PDF
	Project Goals & Objectives
	Daily Task Tracker Template
	Weekly Task Tracker Template
	Performance Planner & Tracker Yearly
	Daily Planner with Weekly Goals & To Do List
Start-up Planning	Estimating the Cost of a Start-up Worksheet
	Detailed Opening Checklist with Example