

Our Business

Office Manual



Table Of Contents

BUSINESS SUMMARY	2
KEY BUSINESS AREAS	4
ORGANISATIONAL TREE	17
STAFF TO DO LISTS	18
Our Business	18
ToDoReport_Our Business.pdf	18
Sample Employee 1	19
ToDoReport_Sample Employee 1.pdf	19
Sample Employee 2	20
ToDoReport_Sample Employee 2.pdf	20
KEY PERFORMANCE INDICATORS AND STANDARDS	21
ROLES JOB DESCRIPTIONS	27
Owners Or Directors	32
Managing Director	33
Marketing Manager	34
Marketing Assistant	35
Sales Manager	36
Sales Person	37
Operations Manager	38
Finance Manager	39
Accounts manager or Bookkeeper	40
Payroll Clerk	41
Human Resources Manager	42
Trainer	43
Safety Manager	44
First Aid Officer	45
Administration Manager	46
Receptionist	47
POLICIES AND PROCEDURES	48
MANAGEMENT AND EXECUTIVE	49
USING THIS TEMPLATE	49
Essential Business Template .EBT. Information Document	49
Attached files of the Essential Business Template	51
Sample document layout	53
COMPANY POLICIES	54
A Quality Business	54
Our Relationships with our Customers	55
Occupational Health and Safety	56

Table Of Contents

Environment and Cultural Heritage	57
Our Team Culture	58
Privacy Dignity and Confidentiality	59
How we manage grievances	60
MANAGEMENT REVIEW	61
Business Strategy and Planning	61
Review of Measurements	63
AUTHORITY AND RESPONSIBILITY	64
Table of Authorities	64
Organisation Chart	65
ASSET PLANNING	66
Workplace Facilities	66
Information Technology Security and Recovery from Disaster	67
Equipment for Operations	70
CONTINUAL IMPROVEMENT	71
Updating Documentation	71
Checking that documents match what people do .Internal Audit.	72
Improving the business system - prevention and correction of problems	73
BUSINESS PLAN TEMPLATE	77
Executive Summary	77
Business Outline	78
SWOT	79
Objectives	80
Risk Management	81
Products and Services	82
Marketing	83
Competitive Analysis	84
Advertising and Promotional Focus	85
Business Operations	86
Management and Key Personnel	87
Legal Matters	88
Financial Overview	89
Summary	90
PLANNING AND STRATEGY	91
Company Overview	91
Business Strategy	93
Market Opportunity	95
Marketing Plan and Strategy	97

Table Of Contents

Financial Plan	107
Product Strategy	109
Vision, Mission, Goals and Objectives	116
Exit Payback Strategy	119
FINANCE	120
ACCOUNTS RECEIVABLE	120
Preparing Invoices	120
Receipting Payments	121
Accounting for Discounts	123
Overdue Accounts	124
ACCOUNTS PAYABLE	125
Purchase Orders .ensuring a paper trail exists.	125
Managing Petty Cash	127
Confirming Receipt of Goods and Conformity of Supply	128
Payment Approval .paying for what we get.	129
PAYROLL	130
Employee use of Time Sheets	130
Preparation of Pays	131
Superannuation Policy	132
FINANCIAL REPORTING	133
BAS Reports	133
Profit and Loss Statements	134
Management Reports	136
OTHER FINANCIAL	137
Credit Levels	137
Loans management	138
MARKETING	139
BUSINESS DEVELOPMENT	139
Marketing Plan	139
Tenders and Quotes	141
Generating Leads	143
MARKETING RESOURCES	144
Managing our online presence	144
What Print Media do we use	145
Direct Mail and utilising our Database	146
SALES	147
PERFORMANCE REPORTS	147
Budgets and Targets	147

Table Of Contents

Weekly Sales Meeting	148
CUSTOMER MANAGEMENT	149
Customer Service	149
Closing Sales	151
Follow up and Feedback	153
OPERATIONS	154
PRODUCING GOODS OR SERVICES	154
Receiving Orders	154
Confirming Scope of Order	155
Preparing Order	156
Delivery of our products and services	157
CORRECTING AND PREVENTING DEFECTS	158
Testing and Inspection to ensure our product is excellent	158
What do we do with Defective Product	159
Identifying Root Causes when things go wrong	160
Product Recall	161
CARING FOR CUSTOMER PROPERTY	162
Identifying and caring for Customer Property	162
DESCRIPTION AND REQUIREMENTS OF GOODS OR SERVICES	163
Discussing and Identifying Customer Requirements .agreeing Scope.	163
Confirming Orders .getting it right.	165
HUMAN RESOURCES	166
STAFF RECRUITMENT	166
Advertising for new staff	166
Interviewing staff	167
Letter of Appointment	169
New Staff .First Day induction.	170
STAFF TRAINING	171
Training Policy	171
Reimbursing Training Expenses	172
DISCIPLINE AND TERMINATION	173
Resignation	173
Disciplinary Action	174
Instant Dismissal	175
PERFORMANCE REVIEW	176
KPIs and Non-Performance	176
DISPUTE RESOLUTION	178
What is Harrassment and what is our attitude to conflict in the workplace	178

Table Of Contents

Grievance Procedure	180
GENERAL HUMAN RESOURCES POLICIES	181
Position Description	181
Staff Responsibilities	182
Staff Rights	183
Wages and Conditions	184
Outside Employment	185
Communication Processes	186
Leave Policy	187
Drug Testing Policy	188
EMPLOYEE MANUAL	191
Introduction	191
Personnel	193
Harassment and Grievances	196
Wages and Conditions	198
Leave	199
Training	200
Responsibilities	201
Business Vehicles	203
Communications	204
General Health and Safety	205
Emergencies and Accidents	207
Attitude	210
Office Safety	211
Security	215
Lone Worker	216
Acknowledgement	217
WORKING SAFER	218
Working Safer	218
Ensuring Workplace Safety	220
Risk Management	227
Hazards and Hazardous Environments	235
Manual Handling	244
Explosive Power Tools and Other Plant	245
Other Workplace Hazards	246
SAFETY	250
CONSULTATION AND CULTURE	250
Consultation	250

Table Of Contents

Safety rules and responsibilities	252
Alcohol, Smoking and Other Drugs	253
HAZARDS	254
Confined Space	254
Managing Stress	255
Emergencies and Accidents	256
Fire	257
Manual Handling	258
Hazardous Materials	259
Lone Worker	260
Office Safety	261
WORKPLACE INSPECTION	264
Housekeeping and Reducing Hazards	264
WORKCOVER CLAIMS	265
Statutory Information	265
ADMINISTRATION AND CULTURE	266
ADMIN SERVICES	266
Reception .our public face.	266
Greeting Telephone Callers	267
Greeting Visitors to the Office	268
Food, Drink and Cleaning Up	269
Opening and Closing Office Procedure	270
Site Security	271
COMMUNICATION	272
Meeting Schedule	272
Corporate identity	274
ASSET MAINTENANCE	275
Scheduled asset maintenance	275
Unscheduled asset maintenance .Faults.	276
RECORDS AND DATA	277
Document and Data Control	277
Filing and Records Management	279
PURCHASING	280
Suppliers and Products	280