

Covid-19 Checklist



M O M E N T U M
BUSINESS IMPROVEMENT





Checklist - Business Preparedness for COVID19

How to use this checklist:

Below are just some of our ideas about maintaining momentum in your business – particularly during this challenging period. They are drawn from the experience we’ve gained over 19 years of working with business owners. Obviously not all the strategies will apply to your specific business. It’s also not an exhaustive list, but hopefully it spurs other ideas that will work for you. On the left hand column are some suggested actions across the key areas of your business. The right hand side column is blank for you to write in what you choose to implement as a result of each suggestion.

Your Business Overall Before we dive into the detail, think about your business risk from a high level.

If you take a high-level overall view of your business, what is the weakest link or most critical point that could be affected?
(For some businesses this may be their supply chain and their ability to access products, for others it may be a lack of productive workforce on the ground).

Some businesses (eg office supplies, pharmacies, home delivered meals etc) may well boom during this period. It’s still important for those businesses to look at what their weakest link could become.

Velocity (Energy, Focus and Direction) in Your Business

1.0 Leadership

In the uncertain times ahead, your Team members are going to be looking to you as an example of how to act. They will take their cues from you. Now is the time to step up as a leader and proactively show them the path you will be taking.

No matter how difficult, stay as positive as possible in your communication with your Team, your customers and your suppliers.

At all times be transparent and honest. Do not try to downplay reality but similarly don’t focus on doom and gloom.



2.0 Information While it's important to stay informed, it is also important to be careful what sources you read and listen to. Beware of taking in too many news stories. Stick to credible, reliable sources.

<p>2.1 Share Relevant Information</p> <p>It is important to share relevant information that impacts on your workplace. For example, information regarding safe working practices for minimising the opportunity for transmission of the disease. By now the vast majority of people should know the basic hygiene rules (eg regular handwashing etc)</p> <p>It's still important to proactively communicate such measures, particularly if there are changes in the advice being given. Use reliable sources of information like those shown at right.</p>	<p>Australian Govt. Advice: https://www.health.gov.au/healthtopics/novel-coronavirus-2019-ncov</p> <p>NSW Govt. Advice: https://www.health.nsw.gov.au/Infectious/diseases/Pages/coronavirus.aspx</p>
<p>2.2 Create a Management/Crisis Team that meets frequently to decide what needs to be communicated to your Team. It may be necessary to do this daily at some stage.</p>	
<p>2.3 Find a fast and effective way to communicate with all your Team members in one hit. For larger businesses this can be challenging. Consider using platforms like WhatsApp groups as an addition to more traditional email etc</p>	
<p>2.4 Signage Think about what signage you need to put up:</p> <ul style="list-style-type: none"> •For customers – explaining the precautions you are taking. Asking them to sanitise their hands upon entry to your workplace etc •For your Team – emphasising the importance of personal hygiene (eg. How to properly wash your hands signs in the bathrooms). New rules for work practices (eg. Wiping down with disinfectant the table top and arms of chairs after a client meeting). For some businesses, particularly in manufacturing, this may mean wearing face masks which had previously not been done. 	
<p>2.5 Put in place policies for your Team members:</p> <ul style="list-style-type: none"> •Not to come to work if they have any of the relevant symptoms. •What will happen if they need to isolate themselves at home. •What will happen if they contract the virus (regarding sick leave, how long they must stay away from work etc) 	<p>Home isolation info sheet: https://www.health.gov.au/resources/publications/coronavirus-covid-19-isolationguidance</p>



<p>2.6 Phone your customers and clients regularly. If you have a sales team already doing this, it's still important for the General Manager, Director or Owner to talk with key clients. Issues to keep them informed about include:</p> <ul style="list-style-type: none">•Your ability to supply them and any necessary changes to regular scheduling•Procedures you have put in place to mitigate health risks (eg. our delivery drivers will be using gloves/ sanitising their hands before each delivery)	
<p>2.7 Alternative Working Practices</p> <p>Talk proactively with your team about any of the following that might work in your business.</p> <ul style="list-style-type: none">•Working from home. For many this is not possible but by thinking laterally, almost every business could find some people this would apply to.•Using up annual leave. For some businesses who will experience a slowdown, there is no point twiddling thumbs. Asking your Team to take annual leave at this time could make sense (of course, check with your employment-law advisors as to how to go about this).•Dropping down to a shorter working week. Some industries which may be hardest hit, might consider dropping to a 3 or 4 day week. This may be vastly preferable to laying people off. This may sound like an extreme measure but it's best to be proactively prepared by consulting with the relevant employment experts on how this might be done and consulting with your team in advance. Again, don't be alarmist but be prepared.	
<p>2.8 Cross-Training</p> <p>It's easy to say and can be challenging to do. Think about the absolutely critical functions of your business that only 1 person (or a handful of people) are able to do. How will you manage if that person is off sick? Think about the best placed person (or people) to be reserves for that task. It is helpful to create some simple checklists (or even videos) of how to do these tasks.</p> <p>For example, if only one key person does payroll in your business, who will take over if they are ill?</p>	



Mass: Resources and Systems in Your Business

3.0 Marketing:

This is the worst possible time to stop marketing. In fact, in most cases, it's critical to do the opposite.

<p>3.1 Look for cheap ways to increase your existing marketing efforts in terms of lead generation:</p> <ul style="list-style-type: none"> •Increase the frequency of social media posts. •Increase your social media ad spend (this is normally quite cost effective). •Look at piggy-back marketing/strategic alliances with non-competing businesses that have the same target market. •Launch a referral system to your existing clients to encourage them to refer. If you are business to business find ways to refer business to them too. •Increase the number of blog posts on your website. •Review your website. Are there simple changes you can make to improve how well it converts? 	
<p>3.2 Boost your communication with existing clients:</p> <ul style="list-style-type: none"> •If you have a sales Team, increase the number of calls but make them over the phone instead of face to face. Have them explain to clients this is a safety measure you have put in place. For some types of businesses videoconferencing might make sense. •Send out regular offers to past clients. If someone has purchased from you once, they are 6 times more likely to purchase again...twice makes it 10 times more likely. •Offer existing clients package deals to give them a reason to buy now. •Offer an incentive for them to increase their number of purchases/interactions for the •Month. eg. if they normally use your services twice a month, offer an incentive for 3 times. •Go back to databases/lists of past customers eg. for a hotel, business travellers that used to stay with you 2 years ago but haven't been back since. 	
<p>3.3 For delivery-based businesses aim to book in your customer's next delivery when the current one is being dropped off.</p>	



3.4 For appointment based businesses, always book in the client's next visit at the point at which they are leaving.	
4.0 Sales This is the time to convert every current opportunity you have and to focus on increasing the size of each sale you make.	
4.1 Follow-up every single quote multiple times. If the volume of quotes you do, doesn't allow this, then double or triple your current rate of follow-ups. Consider automated follow-ups, either as an addition to phone calls or where currently there is no-follow up (eg. For lower dollar value quotes).	
4.2 Follow-up past leads that never made it to quote stage. Review leads that you thought were "dead" and send them some communication.	
4.3 Create checklists of add-on products that go with your core lines. Train your people to run through them every time. For example, if you sell bikes, your customers may need a bike chain, lights, stand, drink bottle holder etc. Every single business can find some untapped potential here.	
4.4 Sell off obsolete or slow-moving stock. Most businesses that sell products have some. It's far better to have cash in your pocket than old stock on the shelves even if you're just breaking even on it.	
5.0 Product and Service Delivery Obviously maximising the safety of your team and your customers is critical. This is also the time, however, to increase your levels of customer service (not necessarily face to face).	
5.1 Supply Chain If you sell physical products, now is the time to be pro-actively communicating with your suppliers: <ul style="list-style-type: none">•How well stocked are they?•Do they foresee specific challenges with their delivery schedules?•Do you need to shore up alternate suppliers in case of stock-outs?•Are they willing to extend their credit terms in this period?	
5.2 Manufacturing/Materials Handling Processes <ul style="list-style-type: none">•Think about your workflow. What procedures can you put in place to minimise the possible spread of disease. Eg physically separating out work benches, sanitising	



<p>workspaces regularly, having hand gel available everywhere etc.</p> <ul style="list-style-type: none"> •What additional PPE might be useful – eg disposable gloves for factory workers or delivery drivers etc. •Sanitising cabs of trucks after use etc. •Think about the step in your process/workflow which most exposes your Team to health risks. 	
<p>5.3 Channels to Market This “crisis” could create a great opportunity for you to review how you actually get your product or service to the end-user.</p> <ul style="list-style-type: none"> •If you’ve been dabbling with an online offering, now may be the time to put it in place. •If you’ve always sold via distributors is there an opportunity to go direct to market (perhaps with a slightly different offering or different brand)? •If you’ve only ever sold business to business, do you have an offering that would work for a business to consumer channel (or vice versa). •If you have a workforce that you deploy in one industry can it be deployed in others (eg. Contractors who only ever work in mining also targeting commercial building). •If there’s been a natural add-on product or service line you’ve been considering, could you fast track it now to boost revenues? 	
<p>5.4 Customer Service Think about the extra steps you could put in place to delight your clients:</p> <ul style="list-style-type: none"> •A toilet roll as a gift with each purchase? 🍻 •Small delivery gifts to wow clients eg a box of chocolates with each order. •A value-add with their service – eg. fix the hot water system but also check for dripping taps •Follow-up phone calls after the sale •A thank you gift after sales over \$X •Customer surveys to ask them about their experience. 	
<p>5.5 Managing Emotions Some of your customers may be very stressed at times. Emotions could be heightened. This could come across as customers behaving rudely to your Team. In order to counter this:</p> <ul style="list-style-type: none"> •Train your team to expect this to happen •Get your Team to consciously increase their own level of friendliness. What they give out will be reflected back. •The meet and greet is one of the most critical stages in your customer’s experience – ensure they are greeted warmly when they arrive (or on the phone) and are farewelled equally warmly. The little things matter at a time like this. 	



5.6 Customer Service Consistency

Now, more than ever, people want things to be reliable and consistent.

- Use quality control checklists
- Introduce customer service standards (for example every client must be called 24 hours prior to their appointment)
- Brainstorm with your team ways to exceed your customers' expectations.

6.0 Finance and Administration

In every crisis there is a hidden opportunity.

6.1 Know Your Numbers

At his critical time, it's more important than ever to know the critical numbers in your business. It's also important to be able to get those numbers as quickly as possible. Remember, what gets measure, gets managed. You may well look at your numbers regularly and it's really the frequency that needs to change – from monthly to weekly, or from weekly to daily.

Some important numbers may include:

- Incoming Leads/enquiries
- Number of quotes
- Conversion rate
- Average dollar sale (average invoice)
- Number of client visits
- Cancellation rates (orders/appointments)
- Turnover
- GP%
- Hours worked vs Productive

6.2 Re-financing and credit terms

- Interest rates (at the time of creating this checklist) have just dropped again to historic lows. Are you able to refinance the current business debt you have?
- If you have personal debt or a mortgage is there an opportunity to refinance that?
- Approach your suppliers about extending their credit terms. Be creative, if they won't extend terms look at them decreasing required pack sizes at which discounts kick in.
- Approach customers about paying you faster (this might be especially pertinent for those businesses who supply to government or large corporations).
- Ask suppliers for consignment stock.
- If you are cashed up, ask your suppliers for settlement discounts.



<p>6.3 Government Assistance At the time of writing the federal government announced an assistance package with various provisions for businesses. State governments may follow suit. Contact your accountant to find out what you might be eligible for.</p>	
<p>6.4 Cut Unnecessary Costs</p> <ul style="list-style-type: none">• Don't cut your sales and marketing budget except for spending that is not giving you a return on your investment (broadcast advertising can fall into this area).• Keep investing in training your people – they are your critical frontline.• Cut those unnecessary costs you've ignored for ages.• Review the spending limit your people have authority to go to.• Cut non-urgent travel.• Review your utilities bills.• Ask your bank for better credit card rates.	

Above all, now is not the time for panic....it's the time for planning.

The actions on this checklist are suggestions only – designed to prompt your thinking. The checklist doesn't cover every single area of your business and many areas may not have been addressed.

You may need to seek legal advice before taking some actions.

Hopefully this checklist helps your business through this challenging period. We'd love to hear your feedback on what's really worked for you and any ideas of strategies that could be added to this checklist.

Our goal is to help people do better at business so their business does better for them.

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