Business _____ Date _____

ROSTONE WORKING TOOLS · BUSINESS IMPROVEMENT PLAN

# Where to start: signs and priorities

A three-page worksheet and a 60-minute session for the management team. Page one finds the symptoms and turns them into a short list of priorities, page two plans each priority, and page three sets the review that makes the changes stick.

## 1 Spot the signs

- [ ] Revenue is growing but margin is flat or falling.
- [ ] The same problems come back after they have been fixed.
- [ ] Work stalls when particular people are away.
- [ ] New initiatives take longer and cost more than planned.
- [ ] Managers spend more time reacting than planning.
- [ ] Quality or delivery varies between teams, and no single cause explains it.
- [ ] New starters take a long time to reach the expected standard.

None of these signs proves anything on its own, and each can have a specific cause. When several appear together, they tend to point to how the business is organised and run rather than to a string of separate problems.

**Signs ticked: _____ of 7**

## 2 Turn symptoms into changes

| Symptom we see | Type of improvement | Change to try | How progress is measured |
|---|---|---|---|
| *Invoices go out weeks after jobs finish* | *Process and systems* | *Completion paperwork captured on site and invoicing triggered on sign-off* | *Days from completion to invoice; debtor days* |
| | | | |
| | | | |
| | | | |

**Process** the steps from enquiry to invoiced work

**Operational** scheduling, capacity, hand-offs

**Management and leadership** decision rights, accountability, operating rhythm

**Commercial** pricing, customers, margin by job

**Systems and technology** software set up and used as intended

**People and culture** what the business rewards and tolerates

The shaded row is an illustrative example. Map the process before choosing the tool: automating a muddled process gives a faster muddled process.

## 3 Pick the few

**Priority 1**
Why this one first:

**Priority 2**
Why this one:

**Priority 3**
Why this one:

A business can improve in dozens of ways but not all at once. Choose the few changes that will make the biggest difference, and say why.

A planning aid built from the Rostone guide "What is business improvement?". It is not a diagnosis of any business and does not replace the management team's own job data, margins and evidence of how work flows.

**BOOK A MEETING**
Choose a time for a 30-minute conversation.

**WATCH OUR VIDEO**
See how the GRAX Business System works.

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# The plan on a page

One column per priority. Agree the measure, starting figure and target before the work starts.

## 4 Plan each priority

| Plan element | Priority 1 | Priority 2 | Priority 3 |
|---|---|---|---|
| **Diagnosis** How it runs today, from evidence | | | |
| **Owner** One named person | | | |
| **Measure and target** The measure, starting figure and target | | | |
| **Resources and dependencies** Time, people, budget, systems; what it relies on | | | |
| **Timeline** Allow longer to embed than to design | | | |
| **Making it stick** Documented, trained, reviewed | | | |

Illustrative entry from the guide: invoices go out an average of ten working days after completion; owner, the finance manager; target, two working days within 90 days; reviewed weekly during the trial, then monthly at the management meeting once performance is sustained. The right target depends on the business's own baseline.

Figures shown are illustrative, to show how a priority, owner, target and review period fit together. Full guide: rostoneopex.com/blog/what-is-business-improvement-your-complete-guide/

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Round _____

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# Run it, measure it, hold it

What turns a set of projects into a programme is the regular review: measures checked on a fixed rhythm in management meetings.

## 5 Run it in rounds

**Diagnose**
Map how the work flows today and measure the baseline.

**Prioritise**
Agree the few changes that matter most for this round, with an owner for each.

**Fix**
Make each change with the team who will run it. Try it with one team or job type first, then adjust it before it goes everywhere.

**Hold**
Write it into the process, train it, build it into systems and measure it.

Reviewed at: _____ How often: _____ Round ends (e.g. end of quarter): _____

### MEASURES TO REVIEW

| Area | Examples |
|---|---|
| **Efficiency** | Time per job, rework, utilisation of teams and vans, cost per job |
| **Quality and consistency** | Call-backs, complaints, right first time |
| **People and management** | Turnover, absence, time for new starters to reach standard, managers' time on planned work rather than reacting |
| **Commercial and financial** | Gross margin by job type, revenue per employee, repeat customers, days from completion to cash |

Mix leading indicators (quotes issued, jobs scheduled with complete packs) with lagging ones (margin, call-backs).

### RUNNING THE SESSION (60 MINUTES)

**Before:** bring last quarter's job, margin and invoicing figures, so the diagnosis rests on evidence.

1. Each person ticks the signs on their own. 5 min
2. Compare ticks and list the symptoms behind them, with evidence. 15 min
3. Sort them by type and agree the few priorities (up to three on this sheet). 10 min
4. For each priority, agree the owner, measure, starting figure and target, and who completes the rest of the plan, by when. 20 min
5. Put the measures on the management meeting agenda and set the date this round ends. 10 min

## 6 Check it will stick

- [ ] Is each change measured against a baseline taken before it started?
- [ ] Are changes tried with one team first before they are rolled out across the business?
- [ ] Is there a regular management meeting where improvement measures are reviewed and the next priorities are agreed?

Questions from the guide. A "no" or "not sure" points to the Hold stage: write the change into the process, train it and review it.

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