

Time Management & Productivity Checklist

For Trades and Service Business Owners

By Steven Rouget

ActionCOACH Business Coach

 **0412 351 755**

 **stevenrouget@actioncoach.com**

 **stevenrouget.com.au**

Introduction

Time is the one resource you can never get back. As a trades or service business owner, you're constantly juggling multiple priorities: managing jobs, dealing with customers, handling admin work, and trying to grow your business.

The challenge isn't working harder – it's working smarter. This checklist provides you with proven strategies to reclaim hours in your day, increase your productivity, and focus on the activities that truly grow your business.

These aren't theoretical concepts. They're practical, field-tested strategies that have helped hundreds of business owners like you gain control of their time and build more profitable, efficient operations.

Section 1: Daily Time Management Fundamentals

✓ Morning Power Hour (6:00-7:00 AM)

The Strategy: Dedicate the first hour of your day to high-value activities before distractions begin.

Daily Actions: - ☐ Review yesterday's accomplishments and lessons learned - ☐ Identify today's top 3 priorities (not tasks, but outcomes) - ☐ Check weather and adjust job schedules if necessary - ☐ Review cash flow position and outstanding invoices - ☐ Plan your day in time blocks, not just task lists

Why This Works: Your mental energy is highest in the morning. Use this time for strategic thinking, not reactive responses to emails or phone calls.

✓ The 2-Minute Rule

The Strategy: If a task takes less than 2 minutes, do it immediately rather than adding it to your to-do list.

Examples: - ☐ Responding to simple text messages or emails - ☐ Filing completed paperwork - ☐ Making quick phone calls to confirm appointments - ☐ Updating job status in your system - ☐ Ordering materials for tomorrow's job

Why This Works: Small tasks accumulate and create mental clutter. Handling them immediately prevents overwhelm and keeps your focus clear.

✓ Time Blocking Your Calendar

The Strategy: Schedule specific times for different types of work instead of keeping a running to-do list.

Time Block Categories: - ☐ **Admin Time** (8:00-9:00 AM): Emails, paperwork, scheduling - ☐ **Job Site Time** (9:00 AM-4:00 PM): Actual work delivery - ☐ **Business Development** (4:00-5:00 PM): Quotes, follow-ups, planning - ☐ **Personal Time** (5:00 PM+): Family, rest, personal activities

Why This Works: Time blocking prevents tasks from expanding to fill available time and ensures important activities don't get pushed aside.

Section 2: Weekly Planning and Priorities

✓ Sunday Planning Session (30 Minutes)

The Strategy: Spend 30 minutes every Sunday planning the upcoming week.

Weekly Planning Checklist: - ☐ Review completed jobs and lessons learned - ☐ Confirm all scheduled jobs for the week - ☐ Check material availability and order what's needed - ☐ Block time for quotes, follow-ups, and admin work - ☐ Identify potential scheduling conflicts or weather issues - ☐ Plan one business improvement activity

Why This Works: Proactive planning prevents reactive firefighting and ensures nothing important falls through the cracks.

✓ The 80/20 Analysis

The Strategy: Identify which activities produce 80% of your results and focus more time on them.

High-Value Activities (Focus Here): - ☐ Face-to-face customer interactions - ☐ Skilled trade work that only you can do - ☐ Business development and networking - ☐ Training and developing your team - ☐ Strategic planning and system improvement

Low-Value Activities (Delegate or Eliminate): - ☐ Basic administrative tasks - ☐ Routine scheduling and confirmations - ☐ Simple material pickups - ☐ Basic customer service inquiries - ☐ Repetitive paperwork

Why This Works: Not all activities are created equal. Focusing on high-value activities multiplies your impact and income.

Section 3: Delegation and Team Development

✓ The Delegation Decision Matrix

The Strategy: Use this matrix to decide what to delegate and what to keep.

Keep These Tasks: - [] Complex problem-solving that requires your expertise - [] High-value customer relationship management - [] Strategic business decisions - [] Quality control and final inspections - [] Training and mentoring team members

Delegate These Tasks: - [] Routine administrative work - [] Material ordering and inventory management - [] Basic customer communications - [] Simple installations or repairs - [] Data entry and filing

Delegation Implementation: - [] Document the process for each delegated task - [] Train the person thoroughly before delegating - [] Set clear expectations and deadlines - [] Create checkpoints for quality control - [] Gradually increase responsibility as competence grows

✓ Building Your Support Team

The Strategy: Identify key roles that can free up your time.

Essential Support Roles: - [] **Administrative Assistant:** Scheduling, paperwork, customer communications - [] **Lead Technician:** Can handle complex jobs independently - [] **Apprentice/Helper:** Handles routine tasks and material management - [] **Bookkeeper:** Financial management and invoicing - [] **Marketing Assistant:** Social media, website updates, lead follow-up

Implementation Steps: - [] Start with the role that would save you the most time - [] Hire for attitude and cultural fit, train for skills - [] Create detailed job descriptions and expectations - [] Implement regular check-ins and performance reviews

Section 4: Technology and Systems

✓ Digital Tool Implementation

The Strategy: Use technology to automate routine tasks and improve efficiency.

Essential Digital Tools: - [] **CRM System:** Track customers, jobs, and follow-ups automatically - [] **Scheduling Software:** Optimize routes and manage appointments - [] **Digital Invoicing:** Send invoices immediately upon job completion - [] **Project Management:** Track job progress and communicate with team - [] **Time Tracking:** Understand where your time actually goes

Implementation Priority: 1. ☐ Start with the tool that addresses your biggest time waste 2. ☐ Master one tool completely before adding another 3. ☐ Train your entire team on new systems 4. ☐ Measure time savings and ROI on each tool

✓ **Communication Systems**

The Strategy: Create structured communication that reduces interruptions.

Communication Protocols: - ☐ **Team Check-ins:** Scheduled twice weekly, not constant interruptions - ☐ **Customer Updates:** Automated where possible, personal when necessary - ☐ **Emergency Contact:** Clear criteria for what constitutes an emergency - ☐ **Email Management:** Check 3 times daily maximum (morning, lunch, end of day) - ☐ **Phone Management:** Designated phone time, voicemail for non-urgent calls

Why This Works: Structured communication prevents the constant interruptions that fragment your focus and destroy productivity.

Section 5: Customer and Job Management

✓ **Efficient Job Scheduling**

The Strategy: Optimize your schedule to minimize travel time and maximize productive hours.

Scheduling Best Practices: - ☐ Group jobs by geographic area when possible - ☐ Schedule similar types of work together - ☐ Build buffer time for unexpected delays - ☐ Confirm all appointments the day before - ☐ Have backup indoor work for weather delays

Travel Time Optimization: - ☐ Plan routes using GPS optimization tools - ☐ Keep commonly needed materials in your vehicle - ☐ Schedule jobs to minimize backtracking - ☐ Use travel time for hands-free phone calls when safe

✓ Customer Communication Efficiency

The Strategy: Streamline customer interactions to save time while maintaining quality service.

Communication Templates: - [] **Appointment Confirmation:** Automated text/email 24 hours before - [] **Job Completion:** Standard follow-up with photos and next steps - [] **Quote Follow-up:** Scheduled sequence of follow-up communications - [] **Payment Reminders:** Automated system for overdue accounts - [] **Seasonal Maintenance:** Automated reminders for regular customers

Why This Works: Templates ensure consistent, professional communication while saving hours of time crafting individual messages.

Section 6: Personal Productivity Habits

✓ Energy Management

The Strategy: Align your most important work with your highest energy periods.

Energy Optimization: - [] Identify your peak energy hours (usually morning for most people) - [] Schedule your most challenging work during peak energy times - [] Take regular breaks to maintain focus (every 90 minutes) - [] Use low-energy times for routine tasks - [] Maintain consistent sleep schedule for sustained energy

Physical Energy Maintenance: - [] Stay hydrated throughout the day - [] Eat regular, healthy meals to maintain blood sugar - [] Take short walks between jobs when possible - [] Stretch regularly to prevent physical fatigue - [] Invest in quality tools that reduce physical strain

✓ Focus and Concentration

The Strategy: Create conditions that support deep focus and minimize distractions.

Focus Techniques: - [] **Single-tasking:** Focus on one task at a time until completion - [] **Phone Management:** Put phone on silent during focused work - [] **Workspace Organization:** Keep tools and materials organized and accessible - [] **Mental**

Preparation: Take 2 minutes to mentally prepare before starting each task - ☐ ☐
Completion Ritual: Celebrate finishing tasks to maintain motivation

Distraction Management: - ☐ ☐ Identify your most common distractions - ☐ ☐ Create systems to minimize or eliminate them - ☐ ☐ Use "Do Not Disturb" signals when focusing - ☐ ☐ Batch similar tasks together to maintain focus - ☐ ☐ Set specific times for checking messages and emails

Section 7: Business Growth Time Management

Strategic Time Allocation

The Strategy: Ensure you're spending adequate time on activities that grow your business.

Weekly Time Allocation Goals: - ☐ ☐ **40% Service Delivery:** Actually doing the work - ☐ ☐
20% Business Development: Marketing, networking, quotes - ☐ ☐ **20% Administration:** Paperwork, scheduling, management - ☐ ☐ **10% Team Development:** Training, mentoring, hiring - ☐ ☐ **10% Strategic Planning:** Improving systems, planning growth

Monthly Review Questions: - ☐ ☐ Am I spending enough time on business development? - ☐ ☐ What administrative tasks can I delegate or eliminate? - ☐ ☐ How can I increase the percentage of time spent on high-value activities? - ☐ ☐ What systems can I implement to be more efficient?

Continuous Improvement

The Strategy: Regularly assess and improve your time management systems.

Monthly Time Audit: - ☐ ☐ Track your time for one week each month - ☐ ☐ Identify your biggest time wasters - ☐ ☐ Look for patterns in inefficient activities - ☐ ☐ Implement one improvement each month - ☐ ☐ Measure the impact of changes

Quarterly Planning: - ☐ ☐ Review your time management goals and progress - ☐ ☐ Identify new tools or systems that could help - ☐ ☐ Plan major improvements or changes - ☐ ☐ Set time management goals for the next quarter

Implementation Roadmap

Week 1: Foundation

- ☐ Implement morning power hour routine
- ☐ Start time blocking your calendar
- ☐ Begin using the 2-minute rule
- ☐ Complete first weekly planning session

Week 2-3: Systems

- ☐ Set up basic delegation systems
- ☐ Implement communication protocols
- ☐ Create customer communication templates
- ☐ Optimize job scheduling processes

Week 4: Technology

- ☐ Research and select one digital tool to implement
- ☐ Set up the chosen tool and train team members
- ☐ Create backup systems for critical processes
- ☐ Begin measuring time savings

Month 2: Optimization

- ☐ Refine systems based on initial results
- ☐ Add additional team members or tools as needed
- ☐ Focus on energy management and personal productivity
- ☐ Conduct first monthly time audit

Month 3: Growth Focus

- ☐ Ensure adequate time allocation for business development

- [] Implement strategic planning routines
 - [] Focus on continuous improvement systems
 - [] Plan for scaling and expansion
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Conclusion

Effective time management isn't about working more hours – it's about making the hours you work more productive and focusing on activities that truly matter for your business success.

The strategies in this checklist have been proven effective across hundreds of trades and service businesses. The key is to implement them gradually and consistently, rather than trying to change everything at once.

Remember: **Small, consistent improvements compound over time.** Start with the strategies that will have the biggest immediate impact on your daily routine, then gradually add more sophisticated systems as they become habits.

Your time is your most valuable asset. Invest it wisely, and your business will provide you with the income, freedom, and lifestyle you deserve.

About Steven Rouget

Steven Rouget is an ActionCOACH Business Coach with 23 years of experience helping trades and service business owners optimize their operations and achieve better work-life balance. He specializes in time management systems, operational efficiency, and building businesses that can operate successfully without the owner's constant involvement.

Steven's practical approach focuses on implementing systems that save time immediately while building the foundation for long-term business growth and personal freedom.

Ready to reclaim your time and build a more efficient business?

Contact Steven Rouget: 📞 0412 351 755

✉️ stevenrouget@actioncoach.com

🌐 stevenrouget.com.au

Book a Free Time Management Consultation: Visit stevenrouget.com.au to schedule your complimentary consultation and discover how these time management strategies can be customized for your specific business situation.

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