

# THE SYSTEMS EBOOK

YOUR ULTIMATE GUIDE TO  
GETTING OFF THE TOOLS



**BUY 4  
TRADIES**  
STRONGER TOGETHER

IN PARTNERSHIP WITH



# Tradie, want to get off the tools and finally take control of your business?

You're not alone if you're working crazy hours because no one else can do the job as well as you can. I've been there. Like many tradies, I was working 80+ hour weeks—flat out on the tools during the day, then stuck quoting, invoicing, and chasing jobs at night. And why? Because I thought the business wouldn't run properly without me.

Turns out, I was right... back then. The phone never stopped ringing with tradies asking basic questions, and our admin team didn't have the training or tools to do their job properly. It was absolute chaos.

That's when I knew something had to change. I went all in on systemising my trade business—creating step-by-step checklists for every task, from job management to admin and customer service. And the result? More time. More control. And best of all—I finally got off the tools.

At Buy4Tradies, we're all about helping tradies save time and money—but what's the point of saving money if your business is still running you into the ground? That's why we've teamed up with **Lifestyle Tradie** to bring you this practical guide—'The Tradies System Solution'.

Systems are what turn your business into a well-oiled machine—so jobs run smoothly, customers are happy, and you finally get time back for yourself. We've done the hard yards building and testing these systems in our own business, so you don't have to. Whether you're a plumber, sparkie, or builder, these proven strategies will help you free up your time, grow your business, and get your life back.

**A special thanks to our partner, Lifestyle Tradie, for sharing their Tradies System Solution with us. Their expertise and commitment to helping tradies take control of their business has been instrumental in making this guide a reality.**

**Let's get systemising.**



**Andy Smith**



# SYSTEMISE YOUR BUSINESS THE LIFESTYLE TRADIE WAY

A successful business is **not** necessarily defined by its size but by how consistently it delivers a profitable product or service to the market.

Systems are **the secret to replicating high quality, profitable results** at ever increasing volumes. Your trade business is no exception!

**A System is group of processes repeated to produce a predictable result.**  
**The better your processes:**

- The less exceptions you will encounter in the course of providing your services to customers.
- The more reliably you can drive a healthy profit margin to your bottom line.



## THE ULTIMATE INDICATOR OF A SYSTEMISED BUSINESS

The ultimate indicator of a systemised business is the extent to which the business is not reliant on you, the owner.

If your systems are working you will not be in the day-to-day operation, endlessly fixing, finishing, explaining, or organising the work being done.

Can your trade business run without you?

# SYSTEMS: WHAT

A system is the documentation of a process or procedure, from start to finish

Systems are the framework of processes inside your business that measure and control the way work is done. The reason people love Systems are because they indicate a level of organisation that builds confidence in the team's ability to deliver consistent, high quality services profitably regardless of increasing volumes.

**Save**

**Yourself**

**Stress**

**Time**

**Energy+**

**Money**

# SYSTEMS: WHY

Following a system is essential to achieving consistency, efficiency and profitability in your trade business.

Creating systems and structure is just one part of the **Lifestyle Tradie business model** and this is where so many trade businesses go wrong. However, even though it's only one part, your systems underpins your entire business.

As tradies we were never taught anything like this in TAFE and many people are scaling businesses that don't have the fundamentals right. It's not your fault because you have no one to talk to, but we're here to highlight that the reason you don't have the business of your dreams (yet) is because your business model is wrong. But now you KNOW better, you can DO better.





# 8 BENEFITS OF SYSTEMS

## 1. PROFITABLE

Systems reduce errors, miscommunication, lost time and rework, resulting in better margins AND happier customers.

Basically, the processes in a system set out the specific steps to achieve the right result and deliver the expected profits to the business bottom line.

## 2. SCALABLE

Well-defined systems enable seamless expansion, minimising disruptions and maintaining performance levels. A systemised business delivers a predictable profit margin. Without systems the actual profitability of the business is anyone's guess, dependant on a number of slippery and ever changing factors that take time and resources to manage.

The greater the differences that exist inside your business, the more unmanageable your costs. In this chaos, more work only means more chaos which will cost you time and money. With documented systems, your productivity, efficiency, results and growth all become more predictable.

## 3. EFFICIENT

A systemised business streamlines and optimises workflows and reduces redundancies. This efficiency leads to time and cost savings, allowing resources to be allocated strategically.

When you introduce a process that everyone follows, the time it takes to complete it, is easy to measure. When everyone does the same task a different way you can't be sure whether the differences in the time it takes or the results they get, is based on the skill of the individual or the steps they take to complete the task.

Once you get everyone completing a task the same way, you know how long the task takes. If you can measure it, you can improve it, shaving off inefficiencies in the process.

## 4. CUSTOMER SATISFACTION

With consistent processes, seamless workflow and reliable delivery, customers experience a high level of satisfaction. They recognise that you are organised and reliable, that you will show up on time, complete the work to the highest standard, with no mess or fuss. Meeting or exceeding expectations fosters customer loyalty and positive word-of-mouth, driving brand recognition and gained market share.

## 5. EMPLOYEE EMPOWERMENT

Clearly documented procedures empower employees to succeed in their every day work by providing guidelines for their roles. They don't need to constantly stop to ask you questions, with systems they actually know exactly what is expected of them.

This fosters a sense of accountability, boosts morale, and enhances overall productivity. Delivering on the expectations of the business creates a sense of achievement and a culture of collaboration and ultimately, employee retention.



## 6. CONSISTENCY

Consistency in a systemised business ensures uniformity and predictability across processes, service delivery, and customer interactions. This uniformity builds trust with customers, assuring them of consistent quality and performance. When once all our customers ONLY wanted me to show up on the job, with systems, our customers knew they would receive a very similar experience whether it was me, or Stew or Graham showing up to complete the work.

## 7. RESPONSIVE

A well-systemised business is better positioned to innovate and adapt to changing market dynamics. Clear processes free up creative energy for both you and your team to stay on the pulse to make quick adjustments in response to evolving customer, supplier, industry or economic changes. This will ensure the business remains competitive and resilient in today's rapidly changing business landscape.

## 8. VALUABLE

Any buyer interested in purchasing your business will see a systemised business as a good investment seeing the business provides predictable profitable results time and time again without the intervention of the owner.

A business that relies on undocumented information, for example a person rather than a process, is less valuable to a new owner because they will have to assume that the profitability of the operation will drop the minute they hand over the keys.

# SYSTEMS: IN REAL LIFE

When our long-term Office Manager of 11 years who ran our office suffered a major health emergency and was hospitalised for ten weeks, and was uncontactable, we were able to pick up her day-to-day activities using the documented processes, so the business did not skip a beat ... **Thank you Systems!**



When hiring a new dispatch/scheduler, we completely trained them to manage incoming calls and scheduling, within two weeks instead of the ten it used to take, using the documented steps ... **Thank you Systems!**



When one of our Tradie's vehicles broke down on the Sydney Harbour Bridge his knowledge of the process meant he took all the right actions to get the vehicle towed and hire one while it was being repaired, seeing him back on the road soon after ... **Thank you Systems!**



When Andy's dad was struck down with a terminal illness with only months left to live Andy was able to walk out of his role in the business to spend every day with his dad, not setting foot back in the business for three whole months. Our systems meant that the team could pick up his regular activities and keep the business running smoothly ... **Thank you Systems!**



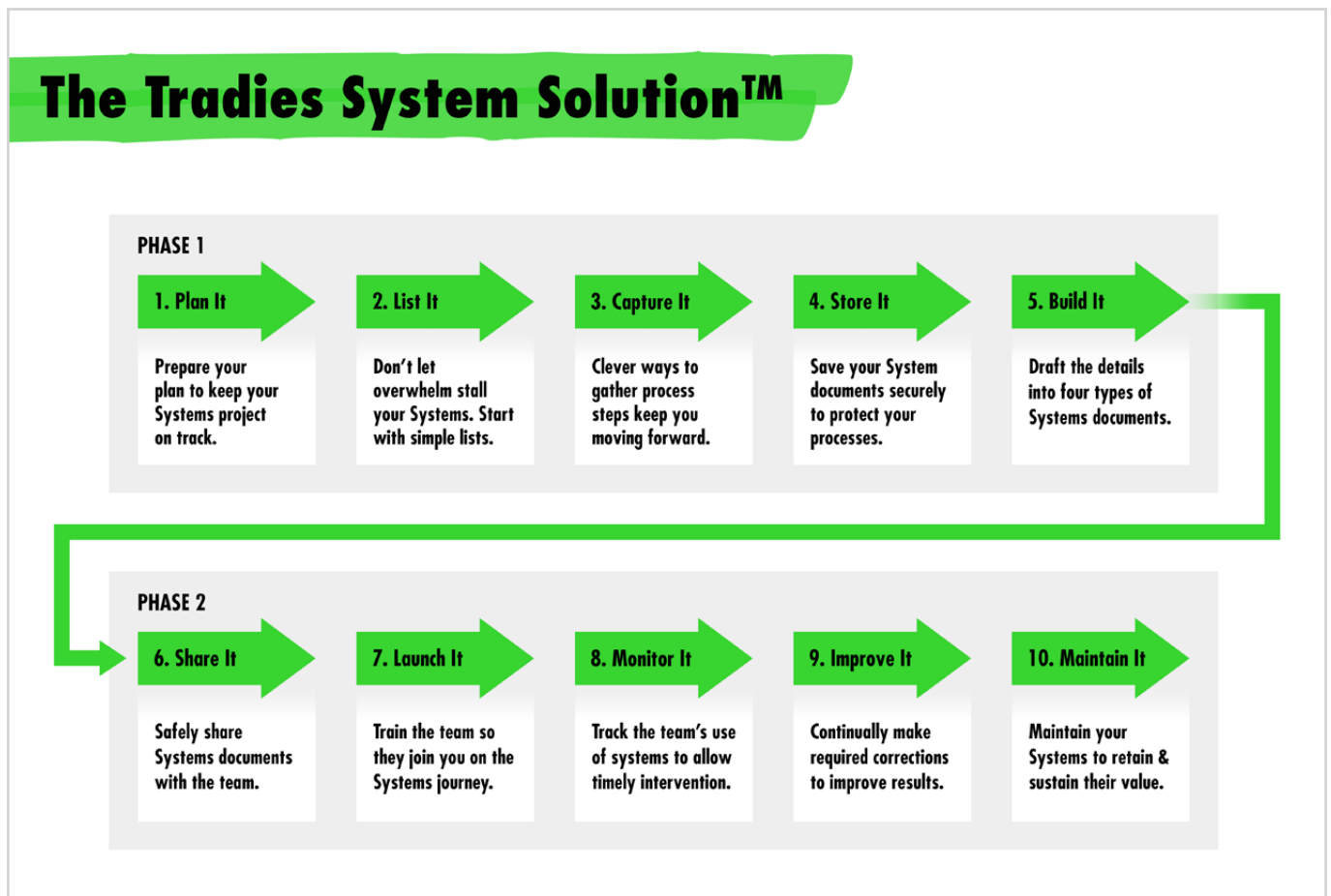
When we sold Dr. DRiP in October 2022 one of the prevailing reasons our buyer found the business attractive was that it was not reliant on its owner for the reported results. Our systems meant that the knowledge so often held only in the head of the trade business owner was transparent and transferrable. Without the dependence on us for ongoing success, our buyer was confident our results were replicable and reliable. And the best part, the day we 'handed over the keys' Andy was not bound to be involved in the business for any time ongoing. Done and dusted! ... **Thank you Systems!**





# SYSTEMS: HOW

Introducing the The Tradies System Solution™. This system comprises of 10 steps in 2 separate phases.



**PHASE 1:** In the first phase of systemising you are documenting your processes, procedures and policies for the first time. This phase is similar to a big project with a start and end date and requires time and resource dedicated to it, lasting anywhere from a month to a year, depending on the size of your trade business.

In this phase you will Plan, List, Capture, Store and Build your system.

**PHASE 2:** In the second phase of Systemising your business, you are using and maintaining what you have built in Phase 1.

In this phase you will Share, Launch, Monitor, Improve and Maintain your systems.

# THE STRUCTURE OF A SYSTEM:

## Processes

The WHAT — The specific steps to achieve a stated outcome. A Process usually has the steps, that summarise the detail on how to complete each step. They are likely to be visual for example a Flow Chart.

The details on how to do each Of the steps is usually in a more descriptive document, referred to as a Procedure.

## Procedures

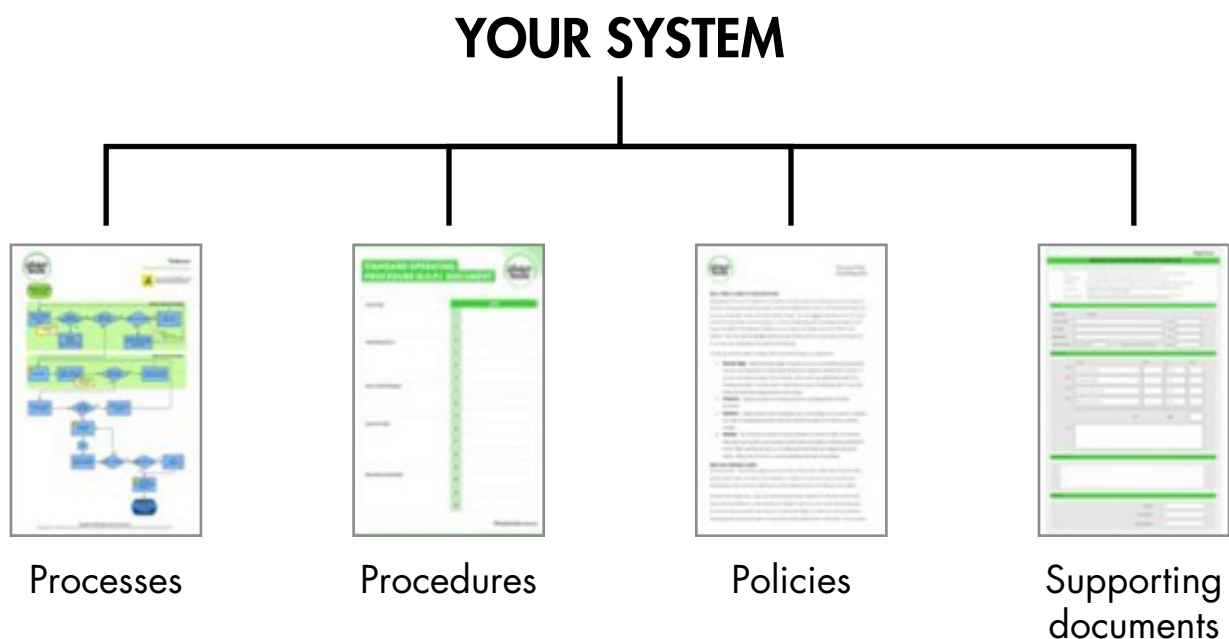
The WHEN and HOW — The instructions to complete a step in a process, usually a word document.

## Policies

The broad rules that impact the whole or large parts of the business e.g., Sick leave or Workplace Health and Safety,

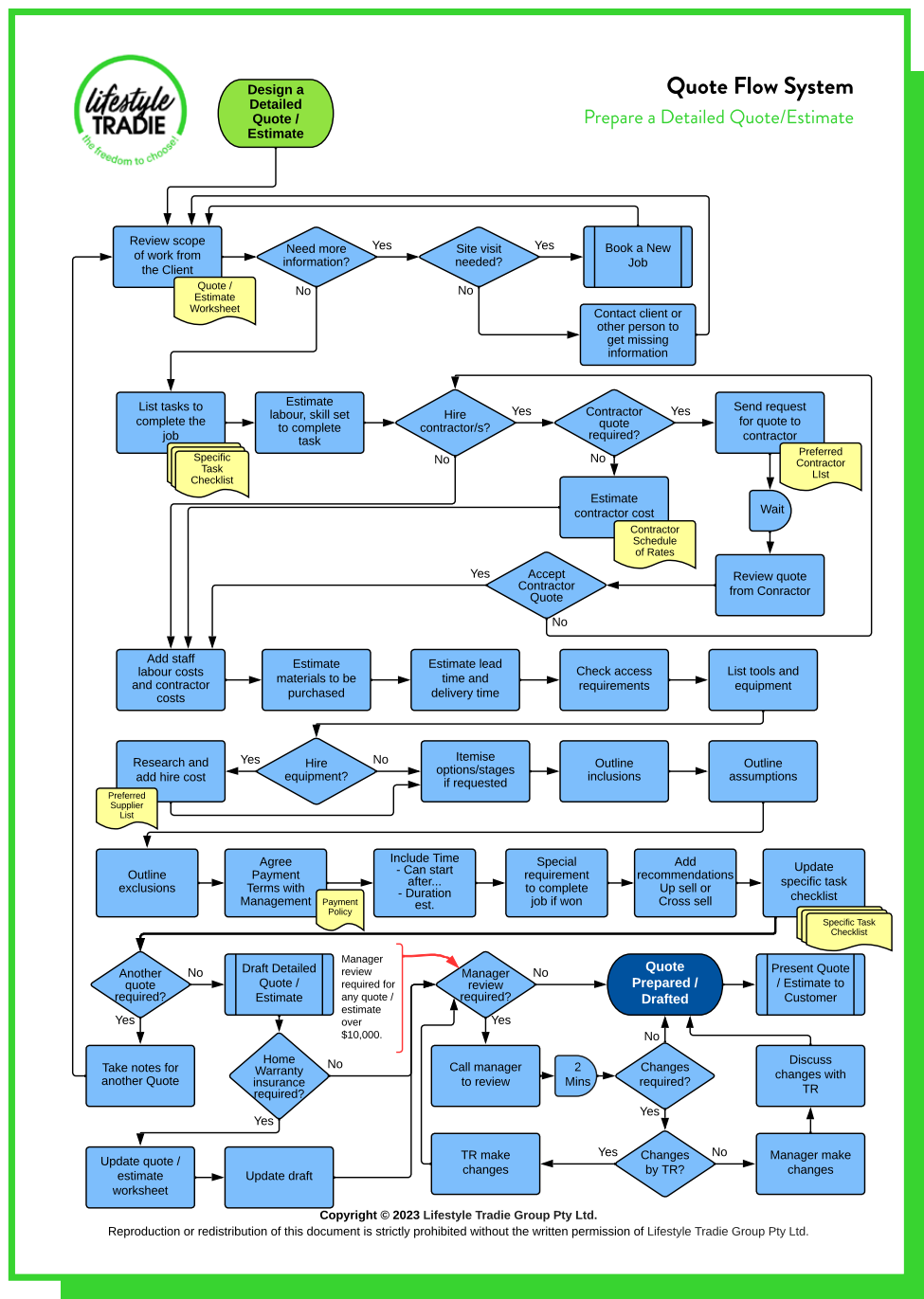
## Supporting documents

The information needed for various processes to be completed. For example the legal documentation to complete when hiring a new team member or a checklist or script. Basically or anything else necessary to complete the process.



# SYSTEMS: FLOWCHART EXAMPLE

This is an example of a flowchart we used for our plumbing company, Dr. Drip. We created more than 260 flowcharts at a cost of over \$200K. This allowed Andy to get off the tools and only work in the business 1-2 hours p/week for the next 10 years. Imagine what your life would look like if you had that kind of freedom in your business.



# SYSTEMS: HOW YOU GET STARTED

It's time to **DECIDE** which system you want to create **FIRST**. When prioritising which processes to document first there are a number of approaches to consider:

## **1. Document the things that cause common or costly mistakes.**

If an error is costing you money, eating away at margins then it needs documenting quickly so that no-one has to rely on direct instructions to do the job properly. This will save you time in both the effort you are putting into avoiding the mistakes but the time you spend fixing the fall out.

## **2. Document the processes you find yourself repeating.**

What do you find you are constantly repeating, reminding or refreshing for your team. What have you said a thousand times but still get asked about? Repetition is unnecessary if the process is documented. Start with the things you find yourself repeating, particularly those things that you know your staff are capable of doing.

## **3. Document processes by role/function.**

Have the Knowledge Holder, the person doing the job, document a list of every task they do. If it is too many tasks to list in one go, ask that they keep a pen and paper handy over a week and jot down each new task they do in that time.

## **4. Document processes by frequency.**

There are tasks that need to be done on a daily, weekly, monthly or yearly basis and given how often they get done, some will have steps in their execution that your team take for granted. Think about what must happen every morning as soon as the lights are turned on...list the tasks.

## **5. Document processes by tasks that are worth less than your hourly rate.**

Based on the rate you charge a customer for your time, what tasks are you doing that you would expect to pay less for, or that you are not proficient at and therefore take you double the amount of time? If you are not a book keeper, trying to learn how to do it through trial and error is an expensive exercise, keeping you from generating revenue efficiently.

Or a combination of the above. The size of your trade business (Start Up, Scale Up or Sell Up) will determine the resources available to you to get the steps for each process documented.

## **YOUR STARTING POINT**

Remember to focus on what you do today.

If you start systemising your business by fixing problems you are unlikely to make much progress. The main thing is to start, documenting what you do today, perfect or not.

# SYSTEMS: 3x WAYS TO DO THIS

**Pen/Paper** - Your first option of capturing this list of activities within a function is good old Pen & Paper. It may sound too simple to start a systems project, but it is a great place to start to get the information out of your head.

It is easy to be distracted by documents in digital format, getting stuck on the function and form of your list rather than getting everything out of your head. A written list is quick and highly effective.

A written list is quick and highly effective. It doesn't need to be organised or pretty, just a list of what you can gather together off the top of your head.

Keep your list simple and focus on WHAT, not HOW.

**Ask yourself HOW do you ...**

- Answer the phone
- Enter new customer details in your job management system
- Invoice a customer
- Prepare for a Tool Box meeting
- Place an ad for a new tradesperson

**The Power Push – List Template**

Using this template, set a timer for 15 minutes for a power push to write down as many processes as you can in the time, in the columns below... Put yourself in the frame of mind of the person working in the role or function, e.g. Admin, Dispatch or Marketing and get as much on paper as you can! **Ready, Set...Go!**

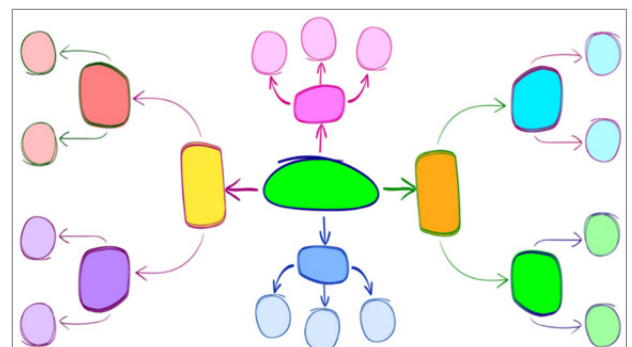
No.	Process	Function (e.g. Marketing)	Role
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Use the Power Push Listing template (in this guide) to give you a sprint exercise...set a timer for 15 minutes and see how many processes you can list in that time. Put yourself in the mindset of the person doing the role or the processes ... Ready Set Go!!!

**Mind Map** - A mind map is a list of ideas sorted into categories as they are noted.

There's software now on the market that helps you to gather multiple ideas in a way that organises them as you go.

It allows you to enter details in a seemingly random fashion but once done, allows quick drag and drop functions to sort the entered list in to categories.



FreeMind is an example of a mind mapping tool freely available to download. There's also Canva or you can use many of the AI tools on the market today to get you started.



**Checklists** - The third option of capturing this list of activities within a function is to use our Checklists.

This is like a cheatsheet where we've already done some of the work for you.

**Here are:**

- 15 tasks for Admin
- 14 within Human Resources
- 6 in Marketing
- And ... 24 for a Tradesperson on the tools.

It's a great base that no doubt you'll need to tweak to tailor more to your trade business, but it's a great start.

<b>Administration</b>		
<ul style="list-style-type: none"><li>• Start Your Day</li><li>• Your Day</li><li>• End Your Day</li><li>• Manage Computer Issues</li><li>• Manage Power Outage</li></ul>	<ul style="list-style-type: none"><li>• Manage Email Account</li><li>• Manage Gross Profit Report</li><li>• Manage No Tracking Access</li><li>• Manage Quoted Jobs</li><li>• Divert Office Mobile</li></ul>	<ul style="list-style-type: none"><li>• Manage Tradesman Timesheets</li><li>• Manage Vehicle Insurance</li><li>• Manage Banking</li><li>• Manage Public Liability</li><li>• Manage Travel Arrangements</li></ul>
<b>Human Resources</b>		
<ul style="list-style-type: none"><li>• Prepare for a New Team Member</li><li>• Prepare for Induction</li><li>• Manage Induction</li><li>• Manage Probation Period</li><li>• Prepare Toolbox Meeting</li></ul>	<ul style="list-style-type: none"><li>• Conduct Toolbox Meeting</li><li>• Finalise Toolbox Meeting</li><li>• Terminate Employment</li><li>• Manage A Resignation</li><li>• Monitor and Manage Performance</li></ul>	<ul style="list-style-type: none"><li>• Conduct a Performance Review</li><li>• Apply for Annual Leave</li><li>• Manage A Contractor</li><li>• Manage Problems with Contractors</li></ul>
<b>Marketing</b>		
<ul style="list-style-type: none"><li>• Build A Website</li><li>• Plan A Marketing Campaign</li></ul>	<ul style="list-style-type: none"><li>• Implement Marketing Campaign</li><li>• Manage Marketing Campaign</li></ul>	<ul style="list-style-type: none"><li>• Manage Marketing Campaign Review</li><li>• Manage Test &amp; Measure</li></ul>
<b>Tradesman</b>		
<ul style="list-style-type: none"><li>• Start Your Day</li><li>• Manage Tablet Issues</li><li>• Manage Work Offline</li><li>• Manage No CRM Access</li><li>• Manage Vehicle Issues</li><li>• Manage After Hours Jobs</li><li>• Your Day</li><li>• Manage Job</li><li>• Meet Customer and Obtain Approval</li></ul>	<ul style="list-style-type: none"><li>• Prepare For Work</li><li>• After Hours Work</li><li>• Manage After Hours Phone</li><li>• Manage After Hours 3rd Party Payee</li><li>• Receive and Confirm A Job</li><li>• Collect Payment</li><li>• Complete Timesheet &amp; Calculate Gross Profits</li><li>• Complete WHS Checklist</li><li>• Manage 3rd Party Payment</li></ul>	<ul style="list-style-type: none"><li>• Finalise Invoice</li><li>• Stock Management</li><li>• Return Lease Equipment</li><li>• Apply for Annual Leave</li><li>• Manage Theft</li><li>• Manage Vehicle Damage/Accident</li><li>• End Your Day</li></ul>

## HOW CAN AI HELP YOUR SYSTEMS?

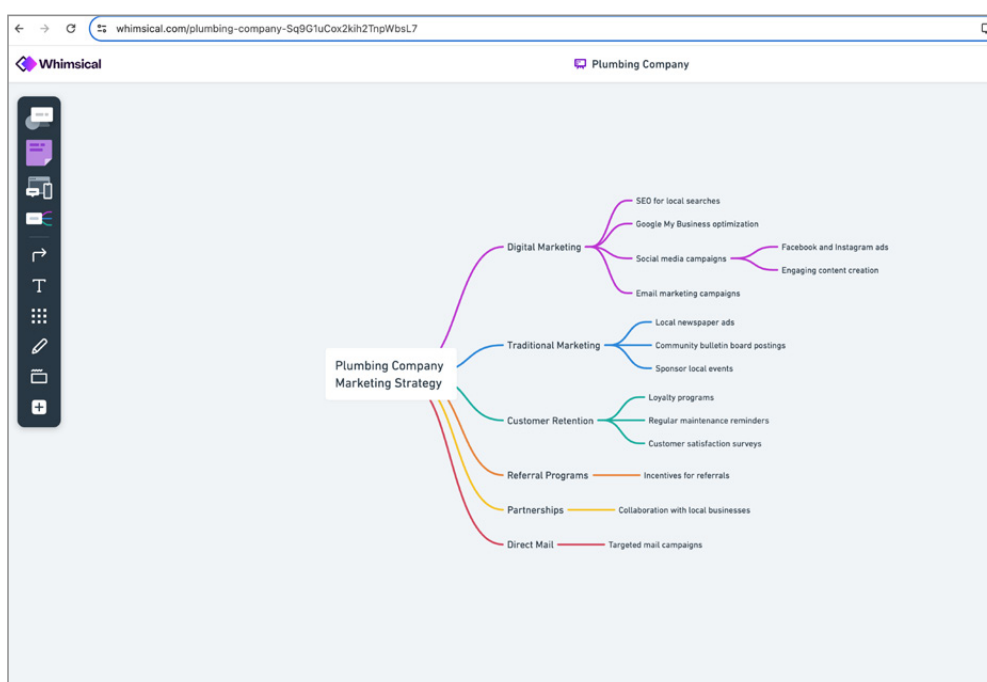
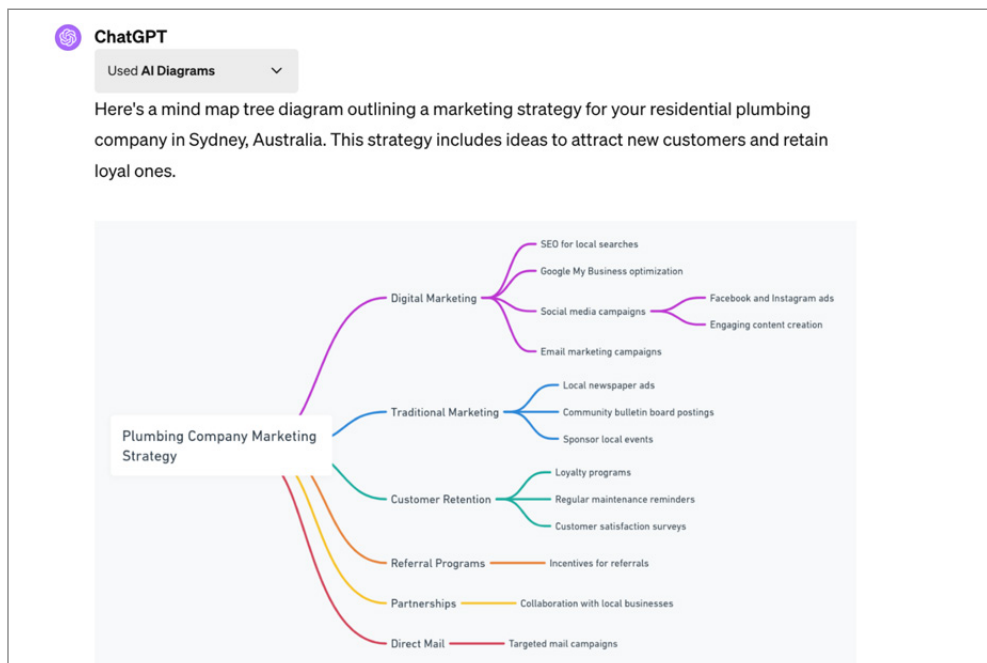
You can lean on AI tools to help define the tasks and responsibilities for every role in your trade business. These tools can save hours of brainstorming and documenting by giving you a solid starting point—especially when you're building out systems for areas like admin, operations, marketing, quoting, or customer service.

For example, platforms like Scribe can automatically record step-by-step processes just by watching how a task is done on your screen. If your admin team is regularly sending invoices or booking jobs, Scribe can capture that workflow and turn it into a documented procedure—ready to be added straight into your business systems.

Other AI tools, like ChatGPT, can help with planning and structure. Say you want to build out your marketing system—you could use an AI assistant to create a mind map showing all the different types of marketing (like digital, word-of-mouth, vehicle signage, and referral programs), and then drill down into the specific tasks under each one. This gives you a visual structure that's easy to tweak, customise, and assign to team members.

Here's a practical example: you might ask an AI tool to "create a mind map of marketing tasks for a plumbing business"—and in seconds, you'll get a tree diagram that lays out strategies like social media, SEO, email marketing, and local partnerships, with suggested tasks under each. From there, you can edit it to match your actual needs and use it as the foundation for your internal systems.

Whether you use these tools to generate ideas, document existing processes, or build new systems from scratch, they're powerful time-savers that help bring structure and clarity to your business—fast.



# THE POWER PUSH - LIST TEMPLATE

Using this template, set a timer for 15 minutes for a power push to write down as many processes as you can in the time, in the columns below .... Put yourself in the frame of mind of the person working in the role or function, e.g. Admin, Dispatch or Marketing and get as much on paper as you can! Ready, Set Go!

No.	Process	Function (E.g. Marketing)	Role
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### Administration

- Start Your Day
- Your Day
- End Your Day
- Manage Computer Issues
- Manage Power Outage
- Manage Email Account
- Manage Gross Profit Report
- Manage No Tracking Access
- Manage Quoted Jobs
- Divert Office Mobile
- Manage Tradesman Timesheets
- Manage Vehicle Insurance
- Manage Banking
- Manage Public Liability
- Manage Travel Arrangements

### Human Resources

- Prepare for a New Team Member
- Prepare for Induction
- Manage Induction
- Manage Probation Period
- Prepare Toolbox Meeting
- Conduct Toolbox Meeting
- Finalise Toolbox Meeting
- Terminate Employment
- Manage A Resignation
- Monitor and Manage Performance
- Conduct a Performance Review
- Apply for Annual Leave
- Manage A Contractor
- Manage Problems with Contractors

### Marketing

- Build A Website
- Plan A Marketing Campaign
- Implement Marketing Campaign
- Manage Marketing Campaign
- Manage Marketing Campaign Review
- Manage Test & Measure

### Tradesman

- Start Your Day
- Manage Tablet Issues
- Manage Work Offline
- Manage No CRM Access
- Manage Vehicle Issues
- Manage After Hours Jobs
- Your Day
- Manage Job
- Meet Customer and Obtain Approval
- Prepare For Work
- After Hours Work
- Manage After Hours Phone
- Manage After Hours 3rd Party Payee
- Receive and Confirm A Job
- Collect Payment
- Complete Timesheet & Calculate Gross Profits
- Complete WHS Checklist
- Manage 3rd Party Payment
- Finalise Invoice
- Stock Management
- Return Lease Equipment
- Apply for Annual Leave
- Manage Theft
- Manage Vehicle Damage/Accident
- End Your Day

# HOW TO EAT AN ELEPHANT?

**'How do you eat an elephant?'**

**ONE . BITE . AT . A . TIME!**

Tradies often put off creating systems in their business because it can feel a bit overwhelming ... like this HUGE task they need to undertake in their business, that keeps being put off week after week, month after month.

But in the same way you would 'eat an elephant' ... you create systems ONE STEP AT A TIME. Just follow the Lifestyle Tradie Systems Solution™.



Start with creating ONE system p/week and in one year you'll have 52 systems created in your business! Now imagine you did that for your admin and at the same time you have someone else creating one system per week in for your field team. That's 104 systems created in a year!

**The main question Andy and Angela are asked on a regular basis is ... 'How did Andy get off the tools and only work on the business 1-2 hours p/week?'**

**And ... the answer is SYSTEMS! Systems are the key to:**

- Getting Andy off the tools
- Becoming more stable financially and consistently profitable
- Being more efficient
- Scaling
- Increasing retention to 72%
- Being more valuable and attractive to potentials investors



# WANT TO LOVE YOUR BUSINESS AGAIN?

Hi, we're Andy and Angela Smith,  
co-founders of Lifestyle Tradie and Dr. DRiP Plumbing.

We've been in your shoes.

From building a multimillion-dollar trade business to hitting rock bottom, we've faced the chaos of long hours, cash flow struggles, and constant bickering. But we found a way to turn it all around.

We created **Lifestyle Tradie**, an award-winning trade business coaching program and community, to help tradies like you regain control, time, and profit. Whether you're a plumber, builder, electrician, or any other trade, we offer proven systems and strategies that work.

**Here's the thing:** It's not about being the best tradie; it's about becoming a great business owner. If you're ready to reclaim your life and love your business again, let's get started.

As proud partners of Buy4Tradies, we're here to guide you to a better business and lifestyle. Together, we're committed to helping you succeed.

That's why we're inviting you to our **1-Day Live Event for Trade Business Owners, Stress Free Tradie**. This is your chance to learn the exact steps to systemise, scale, and succeed in your trade business—all in one actionable day.

**Andy & Angela Smith**

*Andy & Ange Smith*



Proud Partners of  
**BUY4TRADIES**  
STRONGER TOGETHER

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*The* **TRADIE SHOW**™  
BROUGHT TO YOU BY 

This podcast is about having conversations on topics that matter to tradies, tradie wives, and partners who want to be better at business. You'll hear expert tips, step-by-step trade business strategies, insights and the occasional rant!



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