



**SUCCESS!**

Your business starts with an idea. Giving it life can be a puzzle. You need to identify the end picture, the necessary parts, organize connectors, align parts to flow in sequential cohesion then operate smoothly to produce the idea. Moving through each stage will require a team to succeed.

A C.O.R.E. Business Operations Manual will help.

# BUSINESS SUCCESS PLANNING GUIDE

Mechanics & Elements

**Move Your Idea  
from a Puzzle to  
a Reality**





## ABOUT US

Our team has over 20 years of experience managing various operational and administrative needs from inception to completion with large firms, small businesses, and non-profits. We have handled operations for human resources, financial services, 3rd-party contracts, health and welfare benefit plans, workforce development programs, and residential leasing.

We understand the need for documentation.

“The secret of success is to do the common thing uncommonly well.”

-John D. Rockefeller, Jr.

## A NEED:

Operational Disruptions - when issues stop your business from working smoothly. For example, technology problems can lock important systems, a key vendor is unable to ship supplies, or a team member departs. These interruptions will create delays, reduce productivity, and can be costly to fix.

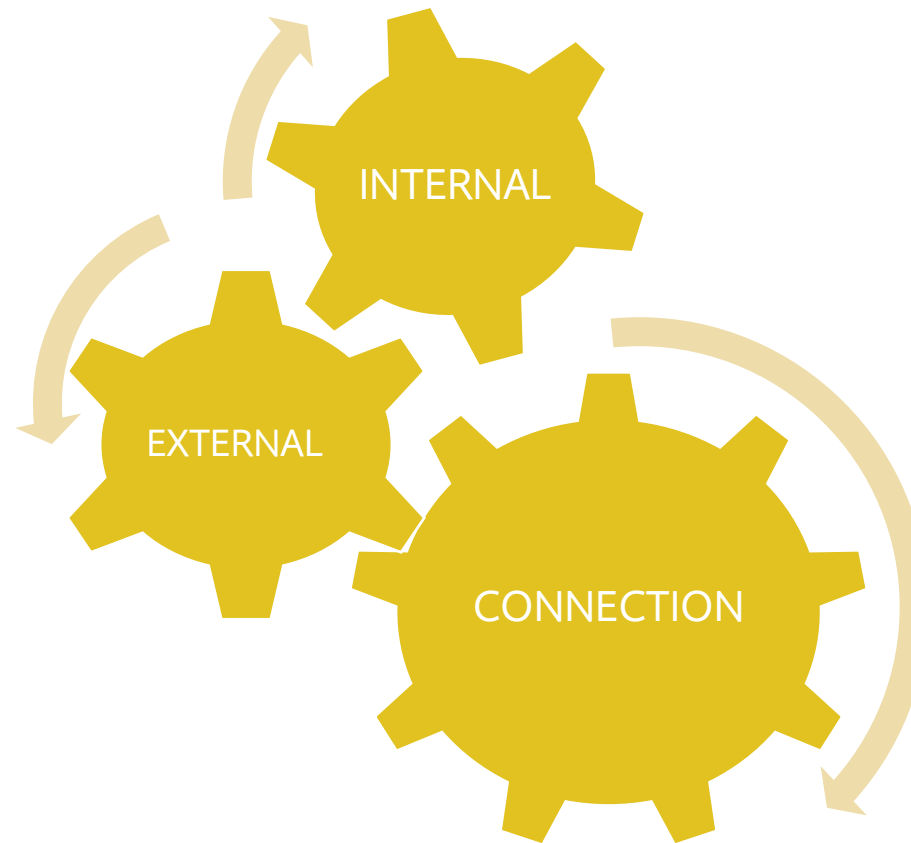
## A SOLUTION:

Whatever the operational disruption, the crisis is minimized when the standard operating practices and procedures (SOP) of the business are written, with instructions on how to complete every task, how to train employees, and include planned preparations to mitigate the impacts of unexpected disruptions.

## A CONNECTION:

Your customers are depending on you to deliver the solution they need. You can't afford delays or disruptions. Our tailored C.O.R.E. Business Operations Manual enables you to consistently align the parts and tasks to minimize downtime. This allows your business to operate with consistency, quality, reduce customer dissatisfaction, and potential revenue loss.

## BUSINESS PLANNING - OPERATIONS MECHANICS



**The success of your business depends on preparing ahead to ensure you can effectively manage issues that impact your ability to deliver time sensitive solutions to your customers. Whether it is an internal issue with a team member, financial capacity, or an external issue with vendor delivery, or inclement weather, the connection IS your operational planning. This business planning guide outlines key puzzle parts with a list of the elements to move your idea to reality. With a C.O.R.E. Business Operations Manual you can align the parts and organize the sequential cohesion to operate smoothly.**

# **BUSINESS PLANNING - OPERATIONS ELEMENTS**

## **1. Strategic Planning and Goal Setting – What are we doing and why?**

- **Mission and Vision Statements**
- **SMART Goals**
- **Business Plan**

## **2. Financial Management – How is the enterprise funded?**

- **Budgeting and Forecasting**
- **Accounting Systems**
- **Financial Reporting**

## **3. Operations and Process Management – How is this managed effectively and consistently?**

- **Standard Operating Procedures (SOPs)**
- **Inventory Management**
- **Quality Control**

# **BUSINESS PLANNING - OPERATIONS ELEMENTS**

## **4. Human Resources and Team Management – How do we take care of our Team?**

- **Recruitment and Hiring**
- **Training and Development**
- **Performance Management**

## **5. Marketing and Customer Relations – How do we provide our service and spread the word?**

- **Marketing Strategy**
- **Customer Service**
- **Customer Relationship Management (CRM)**



**Joeaud Services, LLC**

ADMINISTRATION SIMPLIFIED

**CONTACT:**

**Valerie Mulcare  
Administrator**

**Email: [mulcare@joeaud.biz](mailto:mulcare@joeaud.biz)**

C.O.R.E. Business Operations Manual©2024  
Business Success Planning Guide©2024

**Joeaud Services, Administration Simplified!**

Achieving success may look different for each of us. By establishing a written C.O.R.E. Business Operations Manual you will have peace of mind that you are prepared to mitigate disruptions and plan for growth.

That makes you unstoppable.

**CONGRATULATIONS!!**

The Joeaud Services team is cheering for your success.