



Operations Portfolio

Before I build anything, I figure out what is going on in the business, what is doing well, and what is broken. Then I will work with you on creating the best outcome that will support you, your staff, and your business goals. Every document in here started with a conversation about what wasn't working. These are the results.

What's Inside:

Training & Onboarding

New hire onboarding and training documents outlining workflow steps to ensure understanding at every experience level. No more execs spending valuable money asking repetitive questions.

Documentation & SOPs

Documents for your most repeated tasks, written so clearly that new starters can follow without asking anyone. No more processes living in one employees head.

Admin & HR Templates

Leave forms and HR documents that are print-ready, date-stamped, and built to resolve conflicts before they happen. For businesses that cannot justify HR software expenses.

Operational Reporting

Excel dashboards to monitor sales, employee leave, project management, and any additional requests. No more wondering how well the products are selling.

Process Management

Task lists and project trackers with colour-coded status flags, owner fields, and next-step notes so nothing falls through the cracks.

Who This Is For:

Growing SMEs

Businesses that have recently hired more people to sustain growth but feel like they cannot maintain their work.

Managers & Directors

Businesses that know work is not efficient enough but don't have the time to fix the issues.

New Businesses

Founders setting up operations properly from day one, instead of retrofitting broken processes later.

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TRAINING & ONBOARDING – Telemarketing Onboarding Guide

A structured, role-specific guide covering company background, product knowledge, call scripts for four audience types (architects, structural engineers, QSs, and main contractors), common objections, CRM logins, and email setup, everything a new hire needs before their first call.

WHAT'S INCLUDED:

- Tailored call scripts for four distinct buyer types
- Competitor awareness section for informed conversations
- Objection-handling ready reference
- Format: Word Document – Fully Editable

TRAINING & ONBOARDING – LinkedIn Quick-Smart Guide

A step-by-step guide covering how to post, repost with commentary, connect strategically, and build a professional presence on the free plan without needing a marketing background to follow it.

WHAT'S INCLUDED:

- Step-by-step instructions for posting, reposting, and connecting
- Guidance on what content performs well for technical audiences
- Covers what to post, how often, and why
- Format: Word Document – Fully Editable

DOCUMENT & SOP – CRM Lead Management SOP

A clear, step-by-step SOP covering how leads are generated, how they are colour-coded by competitor specification, how filters should be applied, how reps prioritise their territory, and the handoff process for leads that fall outside a rep's scope.

WHAT'S INCLUDED:

- Colour-coded competitor classification system explained
- Filter instructions for bid date, value, location, and type
- Clear escalation path for unworked leads
- Format: Word Document – Fully Editable

ADMIN & HR TEMPLATES – Time Off Request Form

A clean, consistent form capturing employee name, request date (for priority), dates requested, leave type (annual, sick, bereavement, family/medical), and a management approval section with space for rejection reasoning.

WHAT'S INCLUDED:

- Priority timestamp to resolve conflicting requests fairly
- Six absence categories covering standard employment scenarios
- Approval/rejection field with written reasoning for managers
- Format: Word Document – Print-Ready & Editable

One client grew by 35% in sales in the
first year.

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OPERATIONAL REPORTING – Holiday & Leave Planner

A multi-tab Excel workbook with a Totals summary sheet (base allowance, used days, remaining balance by employee) and individual monthly calendar sheets where absence codes are entered per day covering holidays, half-days, sickness, compassionate leave, bank holidays, and off-site work.

WHAT'S INCLUDED:

- Supports 20+ employees with individual allowance tracking
- Nine absence types with coded entry
- Running balance updates as entries are made
- Format: Excel Workbook – 12-Month Calendar + Summary

OPERATIONAL REPORTING – Annual Sales Tracker

A multi-sheet tracker capturing every quote by date, employee, product, company, branch, and cash profit. Status fields (Sold, Dead, Current, Lost) enable instant pipeline filtering and give management a real-time snapshot of performance at any level.

WHAT'S INCLUDED:

- Full quote lifecycle tracking: Created → Active → Sold / Lost / Dead
- Multi-rep, multi-product, multi-branch structure
- Cash profit visibility at the individual quote level
- Format: Excel Workbook – Multisheet, Filter-Ready

OPERATIONAL REPORTING – Social Media Tracker & Dashboard

A dual-layer workbook: monthly data-entry sheets for logging individual posts (platform, content type, impressions, likes, comments, shares, clicks) and a dashboard sheet that aggregates totals by platform across the year, with goal targets set per month.

WHAT'S INCLUDED:

- Post-level tracking: platform, content type, theme, and all engagement metrics
- Dashboard totals everything up automatically, so there's no manual rollup at the end of the month
- Monthly targets are set per platform, so you can see at a glance whether you're on track
- Format: Excel Workbook – Dashboard + Monthly Sheets

PROCESS MANAGEMENT – Team Task List & Project Tracker

A clean Excel task list with status flags (Not Started, In Progress, Complete, On Hold, Overdue), priority levels, deadlines, assigned owners, deliverable descriptions, and next-step notes. Colour-coded for instant visual scanning.

WHAT'S INCLUDED:

- Five status states with colour coding for at-a-glance progress
- Three priority levels: High, Medium, Low
- Deliverable and next-steps fields to keep tasks actionable
- Format: Excel Workbook – Fully Editable Template

For a more in-depth version with screenshots, please navigate to my
website at www.jordanbconsulting.com



JORDAN B
CONSULTING

Chaos is just a system you haven't built yet.

www.jordanbconsulting.com
jordanbairdking@gmail.com
+44 (0) 7743 469 596

Ready to fix how your business runs?

Every tool in this portfolio started as a problem someone couldn't solve with what they had. If you're seeing the same questions every week, no consistent process, or good people leaving because nothing is written down, that's the problem I fix.

Book a free 30-minute call. No pitch. By the end of it, you'll know whether what you're dealing with is something I can solve, and roughly what that looks like.

**Your business has outgrown the way it runs.
Let's fix that.**

BOOK A CALL

WEBSITE: www.JordanBConsulting.com

EMAIL: JordanBairdKing@gmail.com

PHONE: +44 0 7743 469596

BASED IN: Aberdeen, Scotland
McKinney Texas
I work remotely and travel when needed