

THE COUPLEPRENEUR PROJECT COMPASS

Division of Assignments & Duties



STRATEGIC PLANNING	RANKING PRIORITY - <i>We need it now or later?</i>	ME	PARTNER	SHARED
Mission Statement / Vision / Values	Now			X
Research Projects	Now	X		
Establish SMART Objectives	Later	X		
Business Licenses / legal compliance	Now		X	

BUSINESS DEVELOPMENT	RANKING PRIORITY	ME	PARTNER	SHARED
Goal Setting	Now			X
Sales Presentations & Bid Creation	Now		X	
New Contract Negotiating	Later		X	
Manages Client Relations & meetings	Later		X	
Contract Renewals	Later		X	

MARKETING	RANKING PRIORITY	ME	PARTNER	SHARED
Product / Service design				
Analyze pricing, Costs and ROI				
Promotions & Advertising				
Web Design & Updates				
Marketing Collateral				
Social Media engagement				
Search Engine Marketing				

ACCOUNTING & FINANCE	RANKING PRIORITY	ME	PARTNER	SHARED
Banking & Budgets				
Invoices / Cash Flow				
QuickBooks / Tax Prep				

INFO & TECHNOLOGY SYSTEMS	RANKING PRIORITY	ME	PARTNER	SHARED
Software (Drop Box, Apps, AI, Etc.)				
Computer hardware & updates				
Email Services				

FIELD OPERATIONS	RANKING PRIORITY	ME	PARTNER	SHARED
Manage Field Staff				
External Client Communications & Meetings				
Internal Associate Communications				
Manager Performance Reviews				
Manager Training / Meetings				
Performance Metrics - KPI's				
Scheduling shifts				

HUMAN RESOURCES	RANKING PRIORITY	ME	PARTNER	SHARED
Analyze manpower needs				
Associate Handbook				
Benefit management				
Corrective Actions / Terminations / Promotions				
Handle all disciplinary / Termination notices				
Hiring - New Hire Processing				
Hiring - Review Screening & interviews				
Staff Evaluations				
Orientation / Initial Hire Training				
Policy & Procedure Documentation				

PAYROLL	RANKING PRIORITY	ME	PARTNER	SHARED
Fix any Payroll system issues for employees				
Assist with payroll issues				
Conduct Payroll operations & processes				
Review timecards prior to payroll				
Handle Payroll discrepancies				
Add/Remove staffing to system				
Processing Payroll Deductions				
Maintain legal compliance requirements				