



Business Insights

Practical guidance for Ugandan businesses from HBC Business Consultancy, a HICO Group company.

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Business Growth & Strategy

Building a Practical Growth Plan for a Small or Medium-Sized Business

HBC Business Consultancy · 23 October 2026 · 2 min read



Growth is easier to manage when it is translated from a broad ambition into a small number of priorities, budgets and actions. For a Ugandan small or medium-sized business, a practical plan should reflect the customers it can serve, the resources it can afford and the risks it can manage.

Start with an honest picture of the business

Review recent sales, gross margins, operating costs, cash balances, debts, stock levels, customer feedback and staff capacity. Separate what the records confirm from what the team merely assumes. For example, a shop in Jinja may report rising sales but still struggle to pay suppliers because too much cash is tied up in slow-moving stock or customers who buy on credit.

Choose a clear direction

Set a specific objective for the next 6 to 12 months. Rather than saying “we want to grow,” a business might aim to increase repeat purchases, improve the margin on its best-selling products, open one carefully researched sales point or reduce overdue customer balances. Choose goals that fit the business model and available working capital.

Understand the customer and the market

Identify the customers most likely to buy, what they value, how they currently solve the problem and why they would choose your business. Speak with existing customers, review lost enquiries and compare competitors on service, reliability, location and value, not price alone.

Turn the strategy into a budget and action plan

For each priority, record the action, responsible person, deadline, expected cost and indicator of progress. Include cash-flow implications and a contingency. Before adding a branch, for instance,

estimate rent, utilities, staffing, stock, licensing and the time it may take to reach sustainable sales.

Review progress regularly

Hold a short monthly review. Compare actual results with targets, identify the reason for gaps and agree on corrective actions. Avoid changing the strategy every time one week is disappointing; look for patterns and use evidence.

A simple example

A Kampala wholesaler wants to increase profitable sales. Its plan could include contacting 20 inactive customers each month, tracking gross margin by product category, reducing stock purchases for slow movers and reviewing results every month. These activities are more actionable than a general instruction to “sell more.”

Key takeaway

A useful growth plan is specific, affordable and reviewed consistently. Begin with three priorities, assign ownership and track a small set of meaningful measures.

Next step

HBC Business Consultancy can help your business assess its current position, develop a practical growth plan and establish a review routine. Contact HBC to discuss your needs; results depend on your circumstances and execution.

Editorial note

This article provides general business information, not individualized financial, legal or tax advice. Validate sector-specific assumptions and budgets before making major commitments.

Business Growth & Strategy

Turning Business Goals into Monthly Targets and Measurable Actions

HBC Business Consultancy · 23 October 2026 · 2 min read



Annual goals help set direction, but teams need clear monthly targets to know what to do next. A target becomes useful when it is measurable, assigned to an owner and connected to daily or weekly actions.

Translate outcomes into indicators

Start with the outcome the business needs: profitable sales, faster service, repeat customers, lower wastage or improved collections. Choose indicators that show both results and the activities that influence them. Sales revenue alone may hide falling margins or growing unpaid invoices.

Use a baseline before setting a target

Review recent records to establish what is normal. If a service business typically receives 40 enquiries a month and converts 8 into customers, management can test actions aimed at improving follow-up and conversion. Do not set targets solely because a number sounds ambitious.

Break annual goals into monthly milestones

A goal to grow annual sales should be translated into monthly expectations that reflect seasonality, stock availability, holidays, school terms or other local factors. Not every month will perform equally. Use realistic assumptions and update the forecast when circumstances change.

Assign responsibility and authority

Every target should have one accountable owner, a deadline and the authority or resources needed to act. A branch manager may own daily sales reporting, while the finance lead monitors collections and cash position. Shared targets should still have clearly defined responsibilities.

Use a compact scorecard

A simple scorecard might include: sales against target, gross margin, customer enquiries converted, overdue receivables, stock-outs, customer complaints resolved and report submission timeliness. Define each measure so that all branches calculate it consistently.

Review without blame, and follow through

Meet briefly each week to identify obstacles and monthly to evaluate results. Ask what happened, why it happened and what will change. Record decisions, owners and due dates. Targets should encourage honest reporting, not concealment or unsafe shortcuts.

Example: a neighbourhood pharmacy

A pharmacy could track availability of priority products, expiry-related losses, customer waiting time, daily sales and stock reconciliation. Any medicine-related measure or operating change should be checked by the responsible qualified pharmacy professional and comply with applicable requirements.

Key takeaway

Targets work best when they connect business outcomes to actions people can influence. Keep the scorecard short, definitions consistent and follow-up routine.

Next step

HBC Business Consultancy can support target-setting, scorecard design and monthly performance reviews tailored to your business.

Editorial note

This article is general management information. Healthcare examples are illustrative and should be reviewed by a suitably qualified healthcare professional before operational use.

Business Growth & Strategy

Why Regular Performance Reviews Matter for Growing Businesses

HBC Business Consultancy · 23 October 2026 · 2 min read



When a business is small, the owner may know every customer and transaction. As the business grows, informal supervision becomes less reliable. Regular performance reviews create a structured opportunity to check results, solve problems and help employees succeed.

Spot problems while they are still manageable

A monthly review can reveal that sales are below target, customer complaints are increasing or supplier payments are becoming difficult. Early visibility gives management more options than waiting until a crisis affects payroll, service or supply.

Review results and the process behind them

Numbers show what happened, but discussion helps explain why. A branch may miss its sales target because of stock-outs, weak follow-up, a local disruption or an unrealistic target. Investigate before concluding that an individual has underperformed.

Make expectations fair and clear

Employees should understand their responsibilities, measures, reporting lines and the support available. Targets should be within their reasonable influence and consistent with policy, resources and applicable employment requirements.

Use a repeatable meeting structure

A useful review can cover: prior commitments; key indicators; customer and operational issues; risks; support needed; and next actions. Record each action with an owner and due date. Keep routine meetings focused and schedule deeper discussions when needed.

Turn findings into improvement

If enquiries are not converted, review response times, the quality of proposals and follow-up habits. If reports arrive late, clarify the format, deadline and person responsible, and check whether the reporting process is unnecessarily complicated.

Build accountability and trust

Performance reviews should be evidence-based and respectful. Recognize strong work, address gaps privately and give people a fair opportunity to explain constraints. Do not use a review as a substitute for proper investigation or established disciplinary procedures.

Example: a multi-branch retailer

Management might compare sales, margins, stock losses and customer feedback across branches. Differences can identify practices worth sharing, but comparisons should account for location, opening hours, stock availability and customer mix.

Key takeaway

A performance review is valuable only when it leads to decisions, support and follow-through. A consistent monthly rhythm can help growing businesses learn faster and manage with fewer surprises.

Next step

HBC Business Consultancy can help establish practical review meetings, reporting templates and performance indicators suited to your organisation.

Editorial note

This article is general management information and is not a substitute for individualized human-resources or legal advice. Have employment-related procedures reviewed by a suitably qualified professional.

Financial Discipline & Compliance

Separating Business and Personal Finances

HBC Business Consultancy · 23 October 2026 · 2 min read



Mixing business and personal money makes it harder to understand profitability, plan payments and support figures in financial reports. Clear separation helps owners see how the business is performing and makes records easier to explain to accountants, lenders and relevant authorities.

Create clear banking and payment routines

Where appropriate and available, use a dedicated business bank or payment account for business receipts and expenses. Keep personal transactions separate. If the business accepts mobile-money payments, document which account is used and reconcile it regularly.

Record money taken by the owner

Owners may withdraw money for personal needs, but those withdrawals should be recorded accurately according to the business structure and accounting treatment. Do not label a personal expense as a business cost simply because it was paid from the business account.

Keep supporting documents

Retain invoices, receipts, payment confirmations, contracts and records explaining the purpose of transactions. For a purchase made partly for business and partly for personal use, seek appropriate accounting guidance and document the basis for any allocation.

Reconcile regularly

Compare bank, mobile-money and cash records with the books. Investigate unexplained differences promptly. Reconciliation can reveal duplicate entries, missing receipts, unrecorded fees or transactions posted to the wrong account.

Plan for tax and statutory obligations

Keep business records organized throughout the year rather than reconstructing them at filing time. Tax treatment depends on the facts, business structure and applicable Ugandan law. Ask a qualified tax practitioner to confirm the treatment of owner withdrawals, expenses and any relevant obligations.

A practical example

A sole trader buys household groceries using the business mobile-money wallet. The transaction should not automatically be treated as a business expense. The owner should record it correctly and avoid repeating the mix-up by using separate payment channels.

Start with a simple monthly routine

Set a weekly document filing time, reconcile accounts monthly and review owner withdrawals with the accountant. Establish who approves payments and how exceptions are documented.

Key takeaway

Separate accounts where practical, record owner transactions honestly, retain evidence and reconcile routinely. Clean records support better decisions but do not by themselves guarantee compliance.

Next step

HBC Business Consultancy can assist with bookkeeping reviews, transaction organization and preparation of records for discussion with your accountant or tax adviser.

Editorial note

Tax and accounting treatments vary by circumstances. This article is general information and should be reviewed by a qualified Ugandan tax or accounting professional before publication as technical guidance.

Financial Discipline & Compliance

Cash-Flow Planning: Managing Collections, Payments and Working Capital

HBC Business Consultancy · 23 October 2026 · 2 min read



A business can record sales and still lack cash to pay rent, salaries or suppliers. Cash-flow planning focuses on when money is expected to arrive and when it must leave, helping management identify gaps before they become urgent.

Understand the difference between sales and cash

A sale made on credit may be recorded before the customer pays. Meanwhile, rent, wages and suppliers may require payment on fixed dates. Track both sales performance and actual cash movement.

Prepare a rolling cash forecast

List opening cash, expected receipts and planned payments by week for the coming 8 to 13 weeks, adjusting the period to suit the business. Use realistic collection dates, not only invoice due dates. Include rent, payroll, taxes, utilities, loan commitments, stock purchases and essential maintenance.

Manage receivables actively

Issue accurate invoices promptly, confirm payment terms and follow up before and after due dates. Keep a schedule of amounts owed, age of debt, promised payment dates and next actions. Resolve disputes early and assess customer credit risk before extending more credit.

Plan stock and supplier payments

Too much slow-moving stock ties up cash; too little stock can cause lost sales. Use sales history and lead times to plan replenishment. Discuss supplier terms early and do not make commitments the forecast cannot support.

Set priorities and approval controls

When cash is tight, management should understand which payments are legally required, essential for safety and operations, or negotiable. Avoid arbitrary decisions that create avoidable harm. Escalate expected shortfalls early and communicate with affected stakeholders responsibly.

Build scenarios

Prepare a base forecast, a cautious scenario with slower collections and a stronger-sales scenario. Ask what happens if a major customer pays late or a supplier price rises. Agree in advance what spending can be deferred and who approves changes.

Example: a service business

A consultancy may complete work in October but receive payment in December. If salaries and rent fall due in November, management needs a plan for the timing gap, not simply a report showing that the job was profitable.

Review weekly

Compare actual receipts and payments with the forecast, update assumptions and record decisions. Forecasts are estimates, so their value depends on timely updates and realistic inputs.

Key takeaway

Cash-flow planning is a forward-looking discipline. Forecast timing, follow up receivables and make spending decisions using current evidence.

Next step

HBC Business Consultancy can help prepare a cash-flow forecast, review receivables and establish a practical working-capital routine.

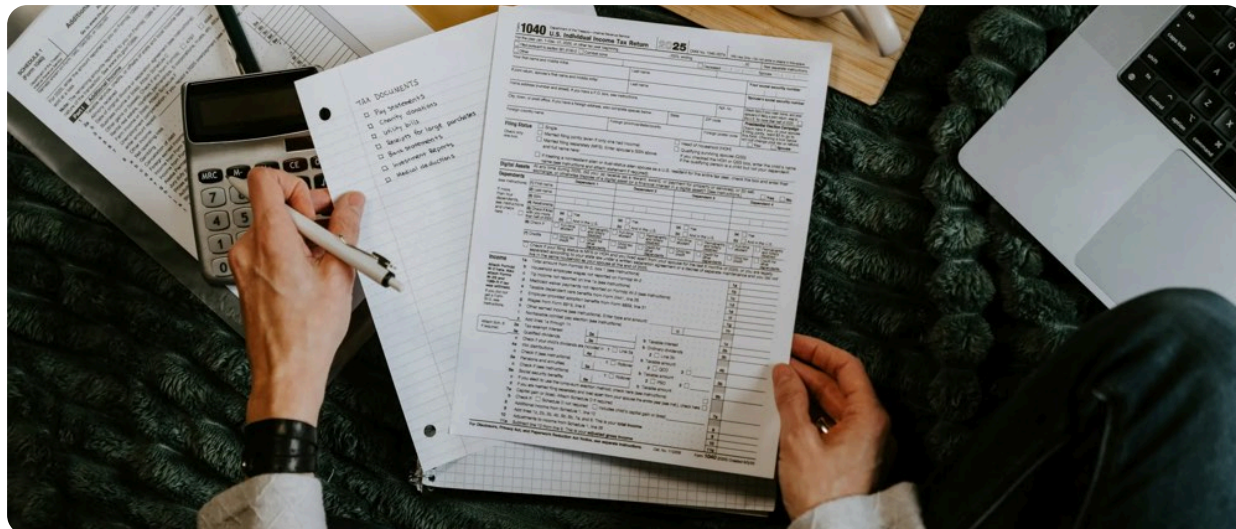
Editorial note

This article provides general business information and is not individualized financial, lending, insolvency or legal advice. Obtain qualified advice before major financing or creditor decisions.

Financial Discipline & Compliance

Record Keeping and Tax Compliance: Building Good Habits Throughout the Year

HBC Business Consultancy · 23 October 2026 · 2 min read



Good records help a business understand its performance, support transactions and prepare for tax reporting. Keeping records only when a return is due can lead to missing documents, rushed reconciliations and avoidable errors.

Create a reliable document trail

Organize sales invoices, purchase invoices, receipts, bank and mobile-money statements, payroll records, contracts, inventory records and tax-related correspondence. Use a consistent naming and filing method, with controlled access to confidential information.

Record transactions promptly

Enter income and expenses regularly, classify them consistently and attach supporting evidence. Reconcile cash, bank, mobile-money and control accounts. Investigate differences instead of carrying unexplained balances forward.

Maintain a compliance calendar

List applicable filing and payment dates, responsible persons, review steps and evidence of completion. Requirements vary by taxpayer and activity, so confirm obligations and deadlines using current official Uganda Revenue Authority guidance or a qualified adviser.

Understand that tax rules are fact-specific

Registration, tax rates, thresholds, deductible expenses, withholding obligations and electronic invoicing requirements can depend on the nature and scale of the business and current law. Do not rely on an old social-media post or apply a general rule without checking whether it fits.

Avoid unsupported arrangements

Do not split, relabel or route transactions simply to disguise the true nature of business activity or avoid an obligation. If a business structure or transaction is being considered for legitimate commercial reasons, obtain professional advice and ensure the records reflect the actual facts.

Review before filing

Compare accounting records with source documents, reconcile tax accounts, investigate unusual movements and obtain appropriate approval. Retain records for the period required under applicable rules and protect them from loss or unauthorized access.

Example: a growing rental business

A property operator should maintain records by property or site, document rent received and expenses incurred, and reconcile collections to agreements and bank records. The correct tax treatment should be assessed using the actual facts and current Ugandan requirements.

Key takeaway

Make record keeping a routine, maintain a compliance calendar and verify current obligations with authoritative guidance. Good administration supports compliance; it does not replace professional review.

Next step

HBC Business Consultancy can help organize accounting records, prepare compliance checklists and identify matters to discuss with a qualified tax practitioner.

Editorial note

This article contains general information only. All tax, statutory and electronic-invoicing statements must be checked against current Ugandan law and official guidance by a suitably qualified reviewer before publication. It is not individualized tax advice.

Financial Discipline & Compliance

Preparing for a Financial Review or Audit

HBC Business Consultancy · 23 October 2026 · 2 min read



A financial review or audit is easier when records are complete, reconciled and accessible. Preparation is not about making the business look perfect; it is about presenting accurate information, identifying gaps honestly and responding to questions with evidence.

Confirm the scope and timetable

Clarify the period covered, purpose of the engagement, records requested, key contacts and deadlines. Understand whether the work is an audit, review, tax compliance exercise or another assignment, because the scope and level of assurance may differ.

Organize the core records

Prepare the trial balance, general ledger, bank statements, reconciliations, sales and purchase records, payroll information, inventory schedules, fixed-asset register, loan schedules, tax filings and supporting contracts as relevant to the engagement.

Reconcile key balances

Reconcile bank and mobile-money balances, customer and supplier accounts, inventory, payroll liabilities, loans and tax-related balances. Investigate differences and document the outcome. Do not create unsupported entries merely to force a balance.

Prepare schedules and explanations

For significant balances, provide a clear schedule showing how the total was calculated and where supporting evidence can be found. Explain unusual transactions, estimates, related-party transactions and changes from the previous period.

Assign a contact person

Choose someone who understands the records and can coordinate responses. Track questions, responsible staff, documents supplied and outstanding items. Provide information through agreed

secure channels, especially where personal or commercially sensitive information is involved.

Be transparent about limitations

If documents are missing or records are incomplete, disclose the issue and explain what steps are being taken. Never backdate, alter or fabricate evidence. Ask the professional how the limitation should be addressed.

Use findings to improve controls

After the engagement, assign each recommendation an owner and deadline. Consider improvements to approvals, reconciliations, inventory control, document retention and management reporting.

Key takeaway

Early organization and honest explanations make financial reviews more efficient. Accurate evidence matters more than a polished folder that conceals unresolved issues.

Next step

HBC Business Consultancy can help organize records, prepare reconciliations and coordinate information for an engagement with the appropriate independent professional.

Editorial note

The work performed and assurance provided depend on the engagement terms and applicable professional standards. This article is general information and does not replace advice from the appointed auditor or accountant.

Marketing & Sales

Choosing Marketing Activities That Match Your Target Customer

HBC Business Consultancy · 23 October 2026 · 2 min read



Marketing works best when it reaches the right people with a message that matters to them. Businesses do not need to use every channel at once; they need to choose activities that fit their customers, budget and ability to respond to enquiries.

Describe the customer you want to reach

Consider location, needs, buying habits, budget, decision process and the problem your product or service solves. A supplier selling to schools may need a different approach from a salon targeting walk-in customers or a clinic communicating service availability.

Match the channel to customer behaviour

Depending on the audience, options may include referrals, a well-maintained Google Business Profile, social media, WhatsApp Business, local partnerships, signage, email or direct visits. Choose channels based on evidence about where customers look for information and how they prefer to communicate.

Make the message specific and credible

Explain the product or service, the customer need it addresses, relevant conditions and how to take the next step. Avoid unsupported claims, hidden charges, misleading discounts or promises that cannot be delivered. Healthcare and financial promotions may be subject to additional rules.

Set a budget and a measurable objective

A campaign might aim to generate qualified enquiries, increase repeat purchases or promote a seasonal service. Set a spending limit and decide how results will be measured before launching. Track both the cost and the quality of the leads generated.

Respond well to interest

Marketing creates expectations. Make sure staff know current prices, availability, service terms and escalation routes. A campaign can damage trust if enquiries go unanswered or advertised items are unavailable.

Test, learn and adjust

Run a small test where practical. Record enquiries by channel, conversion, average sale or other relevant measure, then compare results. Consider seasonality and other factors before concluding that a channel succeeded or failed.

Example: a local retailer

A retailer in Kampala could test a WhatsApp catalogue and customer referrals against a small paid social campaign. It should compare qualified enquiries and completed sales, not just views or likes.

Key takeaway

Choose marketing based on customer behaviour, measurable objectives and the capacity to deliver. Start small, track results and improve what the evidence supports.

Next step

HBC Business Consultancy can help identify target customers, select suitable marketing activities and set up simple campaign measures.

Editorial note

This article is general marketing information. Ensure promotions comply with applicable consumer-protection, privacy, sector-specific and advertising requirements.

Marketing & Sales

Following Up Enquiries and Converting Leads into Customers

HBC Business Consultancy · 23 October 2026 · 2 min read



A customer enquiry is an opportunity to understand a need and help the person decide whether your offer is suitable. Many businesses lose potential sales because responses are slow, follow-up is inconsistent or the next step is unclear.

Capture enquiries consistently

Record the date, contact method, customer need, product or service requested, source of enquiry, responsible staff member and agreed next step. Collect only the personal information needed for a legitimate purpose and handle it responsibly.

Respond promptly and accurately

Acknowledge the enquiry, confirm the need and provide reliable information about availability, pricing, conditions and timing. If you do not know the answer, say that you will verify it and give a realistic time for a response.

Ask useful questions before recommending

Understand what the customer is trying to achieve, the quantity or scope required, deadline and relevant constraints. Do not pressure people into an unsuitable product or make claims that have not been verified.

Agree on a clear next step

The next step could be sending a quotation, arranging a demonstration, confirming stock, booking a consultation or calling at an agreed time. Record the commitment and follow through.

Use a respectful follow-up rhythm

A practical process might include a first follow-up after the agreed response window and another later if appropriate. The right timing depends on the product and customer. Stop when the person declines or asks not to be contacted, and respect applicable privacy and marketing rules.

Learn from lost enquiries

Record whether the customer chose a competitor, postponed the purchase, found the price unsuitable, could not obtain approval or no longer needed the service. Use the information to improve the offer, communication or stock planning.

Example: a business-services quotation

If a Ugandan SME requests an accounting-services quotation, the consultant can confirm the period and scope, send a clear proposal, explain what documents are needed and agree on a follow-up date, without guaranteeing a tax or financial outcome.

Key takeaway

A consistent enquiry process combines prompt responses, accurate information, a clear next step and respectful follow-up. Track conversion to understand where improvements are needed.

Next step

HBC Business Consultancy can help your team create an enquiry register, follow-up process and simple sales-conversion dashboard.

Editorial note

This article is general sales guidance. Follow applicable privacy, consumer-protection and sector-specific requirements when collecting information or contacting prospective customers.

Marketing & Sales

Using Customer Feedback to Improve Products and Services

HBC Business Consultancy · 23 October 2026 · 2 min read



Customer feedback can reveal problems that internal reports miss: confusing instructions, long waits, inconsistent product quality or a service that does not meet expectations. The goal is not to collect compliments alone, but to learn and respond.

Make feedback easy to give

Use short conversations, a suggestion book, a simple survey, follow-up calls or an appropriate digital channel. Ask focused questions such as what worked, what was difficult and what one change would improve the experience.

Listen without becoming defensive

Thank the customer, clarify what happened and avoid arguing before the facts are understood. Staff should know when they can resolve an issue directly and when it must be escalated.

Group recurring themes

Review feedback regularly and categorize it, for example waiting time, product availability, communication, billing or after-sales support. Look for patterns across branches, shifts and customer groups rather than reacting to one comment in isolation.

Close the loop

Tell the customer what action is possible and, where appropriate, what was changed. Do not promise a remedy before confirming authority, facts and feasibility. Even when a request cannot be met, a clear explanation can help maintain trust.

Turn feedback into an improvement action

Record the issue, evidence, responsible owner, deadline and measure of success. If customers report frequent stock-outs, review ordering and demand planning. If instructions are confusing, test a clearer version with users.

Protect confidentiality

Avoid publishing a customer's name, photo, complaint or private details without an appropriate basis and consent where required. Healthcare providers must take particular care with patient confidentiality and clinical information.

Example: a service centre

A Jinja service business may learn that customers are unsure whether a quoted price includes delivery. It can revise quotations to show included services, additional charges and validity dates, then monitor related complaints.

Key takeaway

Collect feedback systematically, look for repeated themes, assign corrective actions and check whether the change helped. Respectful handling matters as much as the feedback tool.

Next step

HBC Business Consultancy can help design customer-feedback questions, complaint logs and service-improvement reviews.

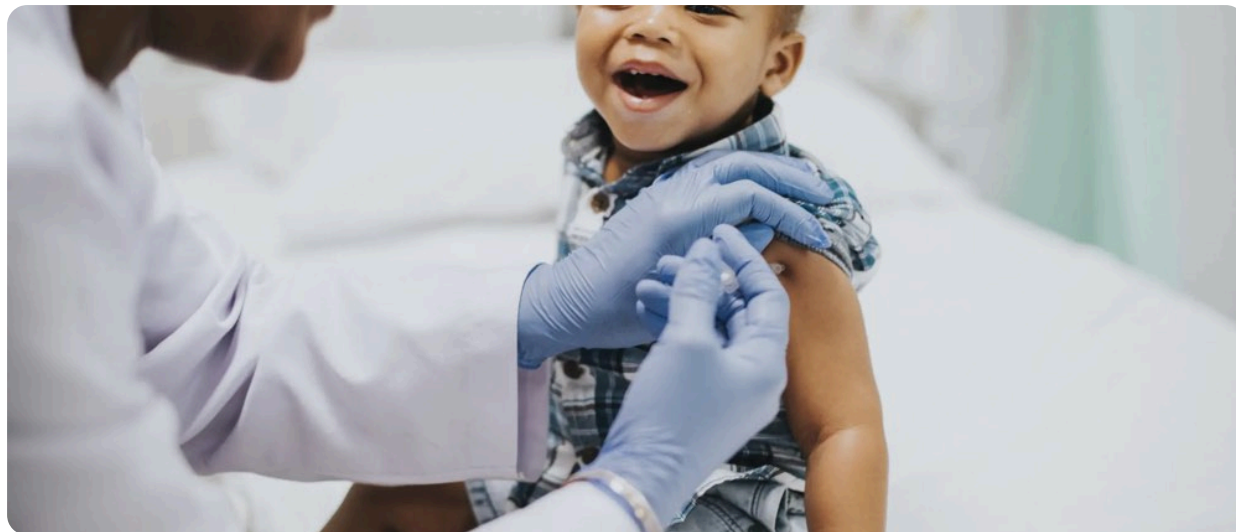
Editorial note

This article is general customer-experience guidance. Privacy, patient confidentiality and regulated-service requirements should be reviewed by an appropriately qualified person.

Customer Experience & Operations

Making Customer Service a Daily Operating Standard

HBC Business Consultancy · 23 October 2026 · 2 min read



Customer service becomes reliable when it is built into daily routines rather than left to individual personality. Clear standards help staff know what customers should experience and how to respond when something goes wrong.

Define observable service standards

Examples include greeting customers respectfully, confirming what they need, explaining prices and waiting times, protecting customer information and giving accurate updates. Standards should be practical for the setting and consistent with professional duties.

Prepare staff to deliver the promise

Train employees on products, service procedures, complaint handling and escalation. Provide current information on prices, stock and service availability. Staff cannot give reliable answers if internal information is outdated.

Make the process visible

Use checklists for opening, handovers, cleanliness, stock checks and unresolved customer matters where relevant. Assign each task to a role and make completion easy to verify.

Handle complaints fairly

Listen, confirm the facts, explain the options and refer matters beyond the employee's authority. Avoid blaming colleagues or promising compensation without approval. Record recurring issues so management can address their causes.

Measure service quality

Track indicators appropriate to the business, such as waiting time, response time, repeat complaints, unresolved cases or customer satisfaction. Avoid targets that encourage staff to rush customers or conceal difficult cases.

Lead by example

Managers should model respectful communication, follow the same procedures and review service issues with staff. Recognize good practice and coach gaps privately and constructively.

Example: a healthcare setting

A clinic may use clear patient-flow information, respectful reception and documented handovers. Clinical decisions, triage protocols and patient-care standards must be set and reviewed by qualified healthcare professionals under applicable requirements.

Key takeaway

Service quality improves when expectations are clear, staff are equipped, problems are recorded and managers follow through every day.

Next step

HBC Business Consultancy can help map customer journeys, document service standards and establish practical quality checks for your business.

Editorial note

This article is general operations guidance. Healthcare, financial and other regulated services must follow applicable professional and legal standards; obtain qualified review before implementation.

Customer Experience & Operations

Reducing Delays Through Clear Responsibilities and Documented Processes

HBC Business Consultancy · 23 October 2026 · 2 min read



Delays often arise when a task passes between people without a clear owner, required information is missing or approval steps are poorly understood. Documented processes make work easier to hand over, monitor and improve.

Map how the work actually happens

Choose a recurring process, such as approving a purchase, serving a customer, issuing a quotation or replenishing stock. Write down each step, who performs it, what information is needed and where waiting commonly occurs.

Define ownership at every step

For each stage, identify the person responsible for doing the work, the person accountable for the outcome and any required approver. Avoid vague instructions such as “finance to handle” when a specific action and deadline are needed.

Set realistic service times

Agree on target turnaround times based on complexity, workload and risk. Define when the clock starts, what pauses it and how exceptions are escalated. Safety, legal and professional checks must not be skipped just to meet a speed target.

Standardize inputs and approvals

Use a short checklist or form to reduce missing information. Specify approval limits, supporting documents and substitute approvers. Keep controls proportionate: unnecessary steps create delay, while missing controls create risk.

Use a visible tracking method

A shared register can show the request date, current stage, owner, deadline, status, reason for delay and next action. Limit access to authorized staff and avoid storing sensitive customer details unnecessarily.

Review bottlenecks and improve

Measure where requests wait, how often they return for corrections and how long the full process takes. Test one improvement at a time, such as a clearer form or a scheduled approval window, then compare the results.

Example: purchase requests

A branch requesting stock can submit a standard request with quantities, current stock, sales evidence and required date. The designated reviewer checks the request, an authorized manager approves it and the requester receives a status update.

Key takeaway

Document the process people actually follow, assign clear ownership and monitor bottlenecks. Improve speed without weakening essential controls or professional judgment.

Next step

HBC Business Consultancy can help document workflows, clarify responsibilities and develop practical process-tracking tools.

Editorial note

This article is general operations guidance. Process changes affecting employment, regulated activities, personal data or statutory controls should be reviewed by the appropriate qualified person.

Customer Experience & Operations

Using Simple Performance Indicators to Improve Service Delivery

HBC Business Consultancy · 23 October 2026 · 2 min read



Performance indicators help a business see whether its processes are delivering the intended results. A useful indicator is clearly defined, based on dependable data and connected to an action management can take.

Start with the outcome that matters

Decide what the business wants to improve: reliability, speed, quality, customer satisfaction, cost control or compliance. Select only a few indicators that reflect those priorities.

Choose balanced measures

Pair speed with quality, sales with margin, and output with customer experience where appropriate. Measuring only the number of customers served could encourage rushed service; measuring only low cost could lead to under-resourcing.

Define each indicator consistently

Document the formula, source, reporting frequency, owner and any exclusions. For example, define whether response time is measured in business hours, how unresolved cases are counted and how duplicate enquiries are handled.

Use a baseline and sensible target

Measure current performance before setting an improvement goal. Targets should consider available resources, customer needs, seasonality and relevant professional standards. Do not copy another business's target without understanding the context.

Review the story behind the number

A sudden change may reflect missing data, a system change, unusual demand or a real performance issue. Confirm the data and ask staff what happened before making decisions.

Keep data trustworthy

Assign responsibility for recording and checking data. Reconcile reports to source records where possible and correct errors transparently. Never reward staff in a way that encourages falsification or hiding complaints.

Example: a small distribution business

It may track order fulfilment time, delivery accuracy, stock-outs, returns and customer complaints. Reviewing these together can show whether faster dispatch is being achieved without increasing errors.

Key takeaway

A small, balanced set of well-defined indicators is more useful than a large dashboard nobody acts on. Review trends, verify data and connect each finding to a decision.

Next step

HBC Business Consultancy can help select practical indicators, define reporting methods and establish a regular service-delivery review.

Editorial note

This article is general management guidance. Indicators used in healthcare, finance or other regulated fields must be reviewed by qualified professionals and must not replace required clinical, safety or compliance standards.