

The Starving-Crowd Test for Your ZIP Codes

Three criteria, one verdict. Answer for the ground you can actually reach in twenty minutes, not for the whole county.

Pain: name three appliance failures in your area that cannot wait a week, and who eats the cost while the customer waits.

Purchasing power: what does a replacement of each of those machines cost, delivered and installed, in your town this month?

Targetability: exactly where do your neighbours ask for a repair technician — which page, which group, which search, which sticker?

Verdict: which ZIP code do you serve first, and what evidence made you pick it over the other two?

Your Homeowner Avatar

Write about one real person you have actually met on a call, not a demographic. If you cannot picture her face, you have not met her yet.

Who is she? House, household, how old her appliances are, and how she found the last repair technician she used.

What has she already tried before calling anyone — which searches, which videos, which panels came off, which plug got pulled?

What is she afraid of, in her own words, before you knock? What has a technician already done to her?

What does she tell her neighbour the next morning if the visit went right? Write the exact sentence.

Personal Runway Worksheet

Every dollar your household needs each month, whether or not the phone rings. Add truck stock as its own line and treat it as money you cannot touch. Multiply the total by six — that is what you are actually risking.

Demand by Month — Appliance Repair

This trade's national demand index, month by month. It is a mild curve — which means a slow month is a marketing problem, not a weather problem. Pencil in your own numbers as you learn your market.

MONTH	DEMAND INDEX	JOB'S YOU EXPECT	REVENUE YOU EXPECT	WHAT YOU WILL DO IN THE SLOW MONTHS
Jan	1.00			
Feb	0.93			
Mar	0.93			
Apr	0.98			
May	0.96			
Jun	1.08			
Jul	1.15			
Aug	1.08			
Sep	0.99			
Oct	0.95			
Nov	1.00			
Dec	0.96			
Year				

Demand index: 1.00 = an average month for this trade nationally (source in Resources). Your ZIP will differ — pencil your own index in the slow and busy months.

Dream Outcome Builder

Her outcome, in her words, with a clock on it. If you cannot say it in one sentence she would repeat, it is not finished.

The outcome she wants, in her words, not in trade language. Start with the machine and end with her evening.

The timeframe she is measuring you against, and the honest version of it on the days you cannot hit it.

The status change: what does having this handled let her say to herself, or to her husband, or to nobody at all?

Write the whole thing as one sentence: outcome, plus timeframe, plus what it means to her.

Obstacle → Solution Map

Fifteen rows. Everything standing between this homeowner and a working machine, sorted into knowledge, skill, environment and psychology — then reversed into something you actually do on the call.

#	WHAT STOPS THE HOMEOWNER	CATEGORY	HOW YOUR OFFER REMOVES IT
1			
2			
3			
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			

Your Value Stack

Score every component twice: what it is worth to her and what it costs you. Keep the cheap ones she values, promote the rest to bonuses, and cut anything that costs you more than it moves her.

Guarantee and Offer Name

Scope it to the work you performed, then name the offer after the outcome and the clock.

Exactly what you guarantee: which fault, which work, and for how long after the visit.

Exactly what you do not guarantee: other faults, pre-existing conditions, parts under the manufacturer's own terms.

What you do when it is invoked — the words you say and the visit you make, written before you ever need them.

Three names. Circle the one a customer repeated back to you correctly the next day.

Service Area and Jobs You Will Not Do

The circle and the no list. Both in writing, both before somebody talks you out of them on a Saturday morning.

Your radius: the ZIP codes inside a twenty-minute drive, and roughly how many households sit in them.

The clusters worth selling to on purpose: landlords, property managers, dealers, complexes. Name real ones.

Jobs you decline and why — brands, ages, categories, sealed-system work you are not yet certified for.

The exact sentence you use to decline, and what you offer instead so the call still ends well.

Your rule for a call outside the circle: the surcharge, the day you batch it, or the flat no.

Ten-Competitor Scan

Ten shops inside your radius. Read the one-star and three-star reviews, not the homepages — the gap column is what your customers already wrote for you.

COMPANY	GOOGLE RATING	REVIEWS	PRICE SIGNAL	THEIR PROMISE	GAP YOU CAN OWN

Your One-Liner and Positioning Statement

Problem, plan, result — in one breath. Then a positioning statement you could defend to a competitor.

The problem, in the homeowner's language, not in trade language.

Your plan in three steps she could repeat to her neighbour without notes.

The result: what her week looks like after the visit, in one concrete sentence.

The whole one-liner, written out. Say it aloud three times and cut every word that survives on ceremony.

Route Density Planner

One week of calls, mapped. Track the drive between each stop and the revenue at each stop, and the pattern in the last column will tell you which half of your service area is paying for the other half.

[illegible]

Entity, EIN and Bank Setup

One afternoon of paperwork that decides whether the business is real. Date each line as you finish it.

- | | |
|--|------------|
| ☐ Choose the entity type and confirm the reasoning in writing with your accountant. | DATE _____ |
| ☐ Check the business name for conflicts at the state level and as a domain, then register it. | DATE _____ |
| ☐ File the formation paperwork with your state and save the stamped copy somewhere you will find it. | DATE _____ |
| ☐ Apply for the federal employer identification number directly with the tax authority — never through a paid intermediary. | DATE _____ |
| ☐ Open a dedicated business checking account and a separate savings account for tax. | DATE _____ |
| ☐ Get a business debit or credit card and stop using your personal card for anything work-related, starting today. | DATE _____ |
| ☐ Ask your accountant whether you collect sales tax on parts, on labour, or on both in your state. | DATE _____ |
| ☐ Apply for a resale certificate so your parts distributor stops taxing stock you are going to resell. | DATE _____ |
| ☐ Check your city and county for a local business licence or home-occupation permit. | DATE _____ |
| ☐ Register the refrigerant certification in your business records once the exam is passed. | DATE _____ |
| ☐ Set up bookkeeping software or a spreadsheet before the first invoice, not after the tenth. | DATE _____ |
| ☐ Put the insurance certificates, the formation documents and the certification in one folder, digital and paper. | DATE _____ |

License Requirements by State — Appliance Repair

Ten states, and the pattern behind them: most license nothing, a couple register the trade, a couple regulate the transaction, and one federal rule applies everywhere. Find your state, then check your city.

STATE	LICENSE REQUIRED?	LICENSE	BOARD	FEE	EXAM
Kentucky	No statewide	—	Check city / county	—	No
Texas	No statewide	—	Check city / county	—	No
California	Yes	Combination Electronic/Appliance Service Dealer Registration	California Bureau of Household Goods and Services (BHGS)	\$190–\$375	No
Florida	No statewide	—	Check city / county	—	No
New York	No statewide	—	Check city / county	—	No
Pennsylvania	No statewide	—	Check city / county	—	No
Illinois	No statewide	—	Check city / county	—	No
Ohio	No statewide	—	Check city / county	—	No
Georgia	No statewide	—	Check city / county	—	No
North Carolina	No statewide	—	Check city / county	—	No
Michigan	No statewide	—	Check city / county	—	No

Federal: EPA Section 608 Technician Certification (Any technician who services, maintains, repairs, or disposes of equipment that could release refrigerant (sealed-system work on refrigerators, freezers, window/portable/mini-split air conditioners) — required by federal Clean Air Act rule regardless of state). Rules change — confirm with the board before you spend a dollar.

Insurance Lines and Annual Cost Ranges

What each line actually covers and what it typically costs. The two that matter most in this trade are the ones people skip: coverage for stock inside the van, and damage to the machine you were working on.

COVERAGE	TYPICAL ANNUAL COST	WHAT IT COVERS	YOUR QUOTE
General liability	\$500–\$1,200	Damage or injury you cause to others	
Workers comp	1.08–3.59 per \$100 payroll	Your crew, hurt on the job	
Commercial auto	\$886–\$2,000	The truck and what it hits	
Bond	\$5,000–\$15,000	No state requires a surety bond specifically for appliance-repair dealer registration (California's BHGS registration requires no bond); some cities/counties require a small bond for a local handyman/repair business license	
Tools & equipment		Theft from the truck or site	
Umbrella		Above the GL limit	

Insurance Quote Log

Three agents, the same four questions each: care-custody-and-control, stock in the van overnight, deductible per claim, and what changes the week you hire.

CARRIER / AGENT	LINE	LIMITS	ANNUAL PREMIUM	DEDUCTIBLE	DECISION

Questions for Your Attorney and Accountant

Two hours each, once, at the start. Write the answers in the margin — you will want them again in a year.

☐ Which entity type fits my situation in this state, and what does it cost me each year to keep?	DATE _____
☐ What must appear on my invoice and my written estimate to satisfy consumer-protection law here?	DATE _____
☐ Does my state require a written estimate or warranty disclosure before I repair an appliance?	DATE _____
☐ Do I collect sales tax on parts, on labour, or on both — and does the rate change by county?	DATE _____
☐ What are my obligations when I haul away or dispose of a customer's old appliance?	DATE _____
☐ How should I handle deposits and parts prepayments so the money is not mine until the work is done?	DATE _____
☐ What is the correct classification for a helper — employee or contractor — under this state's test?	DATE _____
☐ What records must I keep for refrigerant handling and disposal, and for how long?	DATE _____
☐ How should I structure owner pay and estimated tax payments in year one?	DATE _____
☐ What triggers workers compensation obligations in this state, and at what headcount?	DATE _____
☐ What is my exposure if a machine I repaired causes water or fire damage later?	DATE _____
☐ What should I do the first time a customer threatens a complaint or a chargeback?	DATE _____

Equipment Budget — Appliance Repair

Real price ranges at the time of research. Fill in your own column from live listings, and mark what you already own — most technicians starting this trade own half of page one already.

ITEM	LOW	HIGH	DAY ONE?	YOUR PRICE	BOUGHT
Digital multimeter	\$30	\$210	Yes		
Clamp meter	\$70	\$135	Yes		
Non-contact voltage tester	\$14	\$140	Yes		
Nut driver / screwdriver set	\$15	\$90	Yes		
Cordless drill/driver combo kit	\$100	\$250	Yes		
Appliance hand truck / dolly	\$70	\$320	Yes		
Van shelving / storage racking	\$44	\$400	Yes		
Initial van parts/stock inventory	\$8,000	\$12,000	Yes		
Work gloves, safety glasses, PPE	\$15	\$80	Yes		
Refrigerant manifold gauge set (EPA 608 sealed-system work)	\$115	\$360	Yes		
Refrigerant vacuum/recovery pump	\$285	\$915	Later		
Electronic refrigerant leak detector	\$260	\$610	Later		
Essential equipment	\$8,473	\$13,985			

Ranges are retail prices at the time of research (sources in Resources). Used and rental are the day-one shortcuts.

Total Startup Budget

Everything it takes to open the doors. The truck stock line is the one that will surprise you, and the reserve line is the one that keeps you from taking a bad job in week three.

LINE	LOW	HIGH	YOUR NUMBER
Essential equipment (previous page)	\$8,473	\$13,985	
Used cargo van (Ford Transit or equivalent, high-mileage starter unit)	\$15,250	\$38,042	
General liability, year one	\$500	\$1,200	
Launch marketing	\$1,667	\$2,500	
Licenses and permits			
Software and phone, 3 months			
Personal runway (chapter 1)			
Reserve (10% of the total)			
Total startup	\$25,890	\$55,727	

Truck Stock Starter List

The failures you can name in your sleep, not a catalogue. List the part, the brands it fits, what it costs you, how often you actually need it, and whether it earns a slot in the van this month.

[illegible]

Funding Sources

Rank by what it costs and what it can take from you. Trade credit from a parts distributor belongs near the top of this page and almost nobody puts it there.

SOURCE	AMOUNT AVAILABLE	COST (RATE / EQUITY / FAVOR)	SPEED	USE IT?

Client-Financed Acquisition Plan

How the cash from today's call pays for the advertising that fills next week's calendar.

What you collect on the visit itself, and the exact words you use to ask for it at the door.

Your deposit rule on special-order parts: how much, when, and what happens if they cancel.

What one customer pays you in their first thirty days, and what it cost you to find and serve them.

The share of every collected dollar that goes straight back into advertising, and where you park it.

Typical Jobs and Price Ranges — Appliance Repair

National ranges by job type, with the per-hour math done for you. Write your own price in the last column, then compare it to the high end and ask yourself honestly what is stopping you.

TYPICAL JOB	LOW	HIGH	HOURS	PER HOUR (HIGH ÷ HOURS)	YOUR PRICE
Refrigerator repair	\$200	\$300	1.5	\$200	
Freezer repair	\$90	\$500	1.5	\$333	
Oven / range / cooktop repair	\$100	\$500	2	\$250	
Microwave repair	\$50	\$400	1	\$400	
Dishwasher repair	\$160	\$300	1.5	\$200	
Garbage disposal repair	\$75	\$250	1	\$250	
Washing machine repair	\$50	\$450	1.5	\$300	
Dryer repair	\$100	\$400	1.5	\$267	

Crews in this trade bill \$50–\$150 an hour (flat pricing). Technicians earn \$21–\$30 an hour.

Good / Better / Best Builder

Three real options for your most common call. Show the expensive one first — and make sure it is one you would actually be glad to deliver.

	GOOD	BETTER	BEST
Name			
What is included			
What is left out			
Price			
Guarantee			
Who buys it			
Anchor shown first?			

Break-Even Hourly Rate

What one hour costs you before you earn a dollar. Put your own pay in as a real number, not as whatever happens to be left at the end of the month.

LINE	MONTHLY AMOUNT	NOTES
Your pay		
Insurance		
Vehicle + fuel		
Software + phone		
Tools + repairs		
Marketing		
Other fixed		
TOTAL monthly nut		
Billable hours per month		
Break-even hourly = nut ÷ hours		
Target margin %		
Your rate = break-even ÷ (1 – margin)		

Markup vs Margin Table

Markup is what you add. Margin is what you keep. Fill this in with your real part costs until you can convert between the two in a driveway without a phone.

JOB COST	MARKUP %	PRICE	MARGIN %

Your Diagnostic Fee Policy

Write it once, say it the same way every time, and stop renegotiating it in doorways.

Your fee, what it buys the customer, and exactly when it is credited against the repair.

The sentence you say on the phone, word for word, before you agree to come out.

Your answer when she asks you to waive it — short, warm, and final.

The three situations where you genuinely do waive it, decided now instead of in a kitchen.

Your Attraction Offer

The small, cheap first step that reveals a problem she did not know she had — and that she can hold in her hand afterwards.

The offer in one sentence, including the clock: what she gets, and by when.

What you check beyond the machine she called about, machine by machine, in the order you walk it.

What she is left holding when you leave, and what is printed on it.

What it costs you in time and parts per visit, honestly, and what you charge for it.

Upsell and Downsell Plan

What a solved problem creates next — and what you offer when the answer is no. Change the terms or the scope, never the price of the same job.

Your three most common repairs, and the cause standing next to each one that you can fix on the same visit.

The sentence you use to price the second thing while the panel is still off.

Your downsell ladder: what changes about the scope, the schedule or the payment when she declines.

The line you will not cross — the discount you will never give on the same work at the same scope.

Continuity or Referral Plan

This trade has a real annual plan: one or two tune-up visits plus a repair discount. Price it, decide what it covers, and set an honest take-rate target you will actually measure.

PLAY	WHAT THEY GET	PRICE / REWARD	WHEN YOU OFFER IT	TARGET TAKE-RATE

Household Machine Audit

Seven machines in most homes and you were standing in front of all of them. One row per appliance: age, condition, what it needs, and roughly when. This sheet is next year's calendar.

APPLIANCE	BRAND / AGE	CONDITION (GREEN / YELLOW / RED)	WHAT IT NEEDS	ROUGHLY WHEN	QUOTED?

Job-Start Checklist

Before a single screw comes out. Date each line — the ones you skip are the ones that turn into second trips.

☐ Model and serial confirmed from the plate, photographed, and matched to the parts lookup.	DATE _____
☐ Arrival window confirmed by text, and a text sent when leaving the previous call.	DATE _____
☐ Diagnostic fee stated out loud and agreed before the visit.	DATE _____
☐ Floor protection down and a moving pad or slider under the machine before it comes out.	DATE _____
☐ Power or gas isolated, and confirmed isolated with the meter, not with the switch.	DATE _____
☐ Existing damage photographed before you touch anything — floor, cabinet, machine.	DATE _____
☐ Fault confirmed by measurement, not by symptom, and the reading shown to the customer.	DATE _____
☐ Written price with the part number handed over before any disassembly begins.	DATE _____
☐ Approval received and recorded before work starts.	DATE _____
☐ Pets secured and the work path clear, agreed with the customer, not assumed.	DATE _____

Job-Close Checklist

The repair is table stakes. This page is what actually decides the review.

☐ Machine tested through a full cycle with the customer watching.	DATE _____
☐ Failed part shown and handed over, or photographed and shown.	DATE _____
☐ Machine returned to position, levelled, and the drawer, door and trim put back as found.	DATE _____
☐ Work area cleaned beyond what you disturbed — floor, counter, and behind the machine.	DATE _____
☐ Plain-language explanation of what failed and why it failed.	DATE _____
☐ What will go next, and roughly when, written down and handed over.	DATE _____
☐ Part warranty registered in the customer's name and the terms explained.	DATE _____
☐ Payment collected on site and the invoice sent before you leave the driveway.	DATE _____
☐ Review asked for while the machine is still running.	DATE _____
☐ Job logged: fault, part, time on site, and whether it was fixed on the first trip.	DATE _____

Family Worksheet

Where your work crosses into a licensed trade — and exactly who you call when it does. Fill this in before a customer asks, not after.

Gas: what your state lets you connect, what it does not, and which licence covers the rest.

Electrical: where service work ends and licensed work begins in your state, and what needs a permit.

Plumbing: which supply and drain work you may touch, and where the line sits.

Your bench — the licensed electrician, plumber and gas-fitter who will take your call, by name and number.

If you use a qualifier or master of record: whose licence, what it covers, and what your attorney said about it.

Equipment Log

One minute a week. Meters drift, recovery gear needs service, and hand trucks lose straps — you want to learn that in your driveway, not in a customer's kitchen.

Parts Order Log

Every special order tied to the job it belongs to, with the core deposit tracked. A part with nobody's name on it will ride in that van for a year.

Your Warm 100 — 1 of 2

A hundred names from your own phone, worked alphabetically so you do not stop at the easy sixty. Message, mark the response, and ask every single one for a referral.

#	NAME	HOW YOU KNOW THEM	CONTACTED	RESPONSE	REFERRAL?
1					
2					
3					
4					
5					
6					
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					

Your Warm 100 — 2 of 2

#	NAME	HOW YOU KNOW THEM	CONTACTED	RESPONSE	REFERRAL?
26					
27					
28					
29					
30					
31					
32					
33					
34					
35					
36					
37					
38					
39					
40					
41					
42					
43					
44					
45					
46					
47					
48					
49					
50					

Lead Magnet Plan

One narrow problem, solved completely and free — and the bigger problem it reveals. In this trade the obvious one is repair-or-replace.

ELEMENT	YOUR ANSWER
Narrow problem it solves	
Type (reveal / sample / one step)	
Delivery format	
Name (test three)	
Time to consume	
The next problem it reveals	
The offer that solves it	

LTGP : CAC Worksheet

What a customer is worth against what one costs. Remember that a household has seven machines in it — the lifetime number is not one repair.

LINE	AMOUNT	HOW YOU GOT IT
Average job price		
Gross margin %		
Gross profit per job		
Jobs per customer (lifetime)		
LTGP		
Marketing spend last 30 days		
New customers last 30 days		
CAC		
LTGP : CAC		

Rule of 100 — Daily Tracker

One lane, a hundred a day, twelve weeks. Mark it honestly — the point of this page is that you cannot lie to it later.

MEASURE	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12
Cold reaches												
Warm reaches												
Content minutes												
Ad minutes / dollars												
Follow-ups sent												
Estimates booked												

WEEK NOTES

Estimate Visit Checklist

The visit, in order. The items people skip are the ones that lose the job after the fault is already found.

☐ Text before you leave the previous call, with your name and the window you promised.	DATE _____
☐ Shoes covered or wiped, floor protected before the machine moves.	DATE _____
☐ Ask what it has been doing and how long, before you touch anything.	DATE _____
☐ Ask what the last technician told her, and listen to the whole answer.	DATE _____
☐ Say what you expect to find before you open the machine.	DATE _____
☐ Test with the meter and show her the reading.	DATE _____
☐ Photograph the failed component in place before removal.	DATE _____
☐ Write the fault, the part number and the price on paper before any disassembly.	DATE _____
☐ Put the repair price beside the replacement cost and the machine's remaining life.	DATE _____
☐ Give the honest recommendation, including when it is not to repair.	DATE _____
☐ Ask one question about what the downtime is costing her, then be quiet.	DATE _____
☐ Collect on site and register the part warranty in her name.	DATE _____
☐ Ask for the review while the machine is running behind you.	DATE _____
☐ Leave a card and a written note of what you did not do today.	DATE _____

Objections and Replies — Appliance Repair

The eight you will hear every week, what each one actually means, and a reply in your own words. Fill the last column yourself — a borrowed script sounds borrowed.

WHAT THEY SAY	WHAT IT REALLY MEANS	YOUR REPLY
Can you just tell me over the phone what it will cost?	I have been burned by a trip charge that bought me nothing but an opinion.	
Is it even worth fixing?	I am about to spend money and I do not want to be the fool who spends it twice.	
The guy on the neighbourhood page does it cheaper.	I want permission to pay you, or I want you to make the difference visible.	
Can you waive the service call fee?	I want to find out whether your prices are real or negotiable.	
Why is the part so much more than the one I found online?	I think I am being marked up in the dark.	
Can you come today?	I do not actually believe you will come at all.	
The last guy told me it needed a compressor.	I do not know who to believe any more and I am tired of being told things.	
Let me talk to my husband.	You have not given me anything I can repeat to him.	

Repair or Replace Worksheet

Three numbers side by side, in writing, every time: the repair, what the machine has left, and a replacement delivered and installed. Fill one row per common machine so you are not doing arithmetic in a kitchen.

[illegible]

Review Request Script

Word for word, asked while the machine is still running. Ask everyone. Offer nothing in exchange.

The exact sentence you say, out loud, in the kitchen. Write it the way you actually talk.

What you physically hand her — card, code, link — and where it lives in the van.

Your one follow-up, when it goes out, and what it says. There is no second follow-up.

How you reply to a bad review: the first sentence, and what you never say.

First-Hire Scorecard

Seven signals. If you cannot put evidence beside a yes, it is a no. Three or fewer yeses means the bottleneck is somewhere other than hands.

SIGNAL	YES / NO	EVIDENCE
Turning away work weekly		
Working > 55 hours		
Callbacks rising		
Cash covers 8 weeks of wages		
A job description exists		
A training week is planned		
A 90-day exit plan exists		

Subcontractor or Employee Test

The classification is not a preference, it is a test about control. Answer honestly, then take this page to your accountant before the first cheque.

QUESTION	YOUR ANSWER	POINTS TOWARD EMPLOYEE?
Who sets the working hours?		
Who routes the day?		
Whose tools and meters?		
Whose parts and stock?		
Whose van, and whose name is on it?		
Does he work for anyone else?		
Does he carry his own insurance?		
Is he paid by the job or by the hour?		
Can he send a substitute?		
Who trains him on method?		
Is the arrangement open-ended?		
Who eats the cost of a callback?		

30 / 60 / 90 Ramp Plan

What he does, what you watch, and what good looks like at each gate. Write the day-90 decision date before you make the offer.

MILESTONE	DAY 30	DAY 60	DAY 90

Org Chart at \$250k, \$500k and \$1M

Draw the shape before you get there — including what your own job becomes at each level.

At the first level: who is on the payroll, who answers the phone, and how many days a week are you in a van?

At the second: how many technicians, who dispatches, and what have you stopped doing yourself?

At the third: what is your actual job title in practice, and who owns parts, pricing and training?

Which of those three companies do you genuinely want to run? Answer honestly before you build the other two.

The one seat you will never delegate, and why it has to be yours.

Twelve-Month Forecast

Seeded with this trade's own demand index. Build it three times — base, good year, and the year you break an ankle in week six — and keep all three columns.

MONTH	DEMAND INDEX	JOBS	AVG TICKET	REVENUE	COSTS	PROFIT
Jan	1.00					
Feb	0.93					
Mar	0.93					
Apr	0.98					
May	0.96					
Jun	1.08					
Jul	1.15					
Aug	1.08					
Sep	0.99					
Oct	0.95					
Nov	1.00					
Dec	0.96					
Year						

Demand index: 1.00 = an average month for this trade nationally (source in Resources). Your ZIP will differ — pencil your own index in the slow and busy months.

Cash Flow Log

Week by week. Deposits held is the column that saves people: money you have collected for parts you have not yet installed is not yours to spend.

Profit First Allocations

Allocate first, run the business on what is left. Set the percentages against real revenue — after parts — not against the invoice total.

ACCOUNT	TARGET %	THIS MONTH \$	ACTUAL %
Income (100%)			
Profit			
Owner pay			
Tax			
Operating expenses			
Materials / subs pass-through			

KPI Scorecard — Appliance Repair

Eight numbers, pre-loaded with this trade's benchmarks, tracked twelve weeks. First-time fix rate is the one that governs all the others.

MEASURE	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12
First-time fix rate (target 85%)												
Technician utilization rate (target 68%)												
Customer satisfaction score (CSAT) (target 90%)												
Schedule adherence rate (target 90%)												
Decline rate after diagnostic (target 36.9%)												
Average completed repair ticket (target 275 USD)												
Standard diagnostic fee (target 99 USD)												
Parts markup percentage (target 50%)												

WEEK NOTES

Monthly P&L

Fourteen months so you can see a year plus the start of the next one. Gross margin is the line that tells you whether the jobs are priced right; net tells you whether the business is.

MONTH	REVENUE	MATERIALS + SUBS	LABOR	OVERHEAD	NET PROFIT

Days 1–30: Get Cash

One month, one objective: money from a stranger, and the ability to do it again. Date every line as you finish it.

- | | |
|---|------------|
| ☐ Entity formed and federal identification number pulled. | DATE _____ |
| ☐ Business bank account open and personal card retired from business use. | DATE _____ |
| ☐ General liability and commercial auto bound, with stock-in-van coverage confirmed. | DATE _____ |
| ☐ Refrigerant certification exam booked, then passed. | DATE _____ |
| ☐ One parts distributor account open, with terms discussed. | DATE _____ |
| ☐ Phone answered by a human, or a booking service that texts back within the hour. | DATE _____ |
| ☐ Card payment working on your phone, tested on a real transaction. | DATE _____ |
| ☐ Map profile finished: every service listed, real photos, honest hours. | DATE _____ |
| ☐ The hundred warm names written down and twenty messaged a day for five days. | DATE _____ |
| ☐ Attraction offer live and priced, with the diagnostic fee stated out loud. | DATE _____ |
| ☐ First paying customer, collected on site. | DATE _____ |
| ☐ First five reviews asked for while the machine was still running. | DATE _____ |
| ☐ Every job logged: fault, part, time, first-trip yes or no. | DATE _____ |
| ☐ Day-30 count written down: paying customers, and where each one came from. | DATE _____ |

Days 31–60: Get More Cash

Same calls, more money out of each. This month you get paid properly by the customers you already found.

☐ Green-yellow-red whole-house sheet printed and used on every single visit.	DATE _____
☐ Cause named out loud on every repair, with the evidence shown.	DATE _____
☐ Second machine asked about by name on every call, not in general.	DATE _____
☐ Written note of what you did not do today handed over on every job.	DATE _____
☐ Price raised one step on your most common repair.	DATE _____
☐ Twenty calls counted after the raise: yeses, nos, and total money.	DATE _____
☐ First-time fix rate counted honestly for the month.	DATE _____
☐ Last ten second-trips reviewed for the pattern behind them.	DATE _____
☐ Truck stock reviewed: anything unused for two months taken off the restock list.	DATE _____
☐ All cores returned and deposits recovered.	DATE _____
☐ Profit First accounts opened and the first two allocations actually made.	DATE _____
☐ Reviews still being asked for on every job, with no incentives offered.	DATE _____

Days 61–90: Get the Most Cash

The plays that pay you next year. Continuity, referrals, route density, and one honest hiring decision.

☐ Maintenance plan priced, scoped in writing, and offered to every past customer.	DATE _____
☐ Referral ask standardised on every completed job, with a card to hand over.	DATE _____
☐ Ten landlords, property managers or dealers contacted on purpose.	DATE _____
☐ Route reviewed: which zone is paying for which, and what you will stop driving to.	DATE _____
☐ Jobs you will no longer accept written down, with the sentence you decline them with.	DATE _____
☐ First-hire scorecard run honestly, with the decision written down either way.	DATE _____
☐ Job description written for whichever seat the bottleneck actually points at.	DATE _____
☐ Books opened: revenue, margin, and what you actually kept.	DATE _____
☐ Allocation percentages moved one or two points toward target.	DATE _____
☐ Pre-mortem written, with a tripwire and a response beside every likely cause.	DATE _____
☐ Next ninety days drafted before this one closes.	DATE _____
☐ One person told what you committed to, who will actually ask you about it.	DATE _____

Milestones and Tripwires

A date for every milestone and, beside it, the early sign that it is going wrong and what you will do the day you see it. A milestone without a tripwire is a wish.

MILESTONE	TARGET DATE	TRIPWIRE (WHAT TELLS YOU IT IS OFF)	HIT?

Decision Log

Every decision that mattered, why you made it, and when you will look at it again. In a year this page will be the most useful thing you own.