

The Starving-Crowd Test for Your ZIP Codes

Run this for every ZIP code you can reach in twenty-five minutes. All three have to be true. Two out of three is a hobby.

ZIP codes you can reach in twenty-five minutes, and the housing in each (age, carpet, pets, owned or rented):

PAIN — the dated, specific problems those households have, written in the words they would use:

PURCHASING POWER — who can write the cheque today, and the evidence you have for saying so:

TARGETABILITY — exactly how you reach them again and again, cheaply (group, list, route, referral source):

Your Homeowner Avatar

Two avatars, not one. Fill in the homeowner first, then the person who holds keys to other people's units.

Your homeowner: household, floors, pets, kids, and the room that bothers her most:

What she is afraid of before she calls anybody — at least three fears, in her words:

What she has already tried herself, and how that went:

The property manager version: how many doors, what her deadline is, what she needs on an invoice:

Personal Runway Worksheet

Every line your household spends in a month whether the business earns or not. Total it, then divide your at-risk savings by that total. That is your runway in months — and then take one month off the answer.

Demand by Month — Carpet Cleaning

National search interest for this trade, detrended and normalised so an average month reads 1.00. Pencil in your own ZIP code's shape as you learn it — your slow months may not be these.

MONTH	DEMAND INDEX	JOBS YOU EXPECT	REVENUE YOU EXPECT	WHAT YOU WILL DO IN THE SLOW MONTHS
Jan	0.83			
Feb	0.87			
Mar	0.95			
Apr	1.05			
May	1.05			
Jun	1.15			
Jul	1.14			
Aug	1.11			
Sep	1.03			
Oct	1.00			
Nov	0.96			
Dec	0.86			
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 words, not yours. If a sentence here could have been written by any cleaner in your county, it is not specific enough yet.

The outcome she actually wants, in the words she would text her sister — and the day it has to be done by:

The three things she is quietly afraid of, and the line in your offer that answers each one:

What she has to give up to hire you (time, hassle, being home, moving furniture) and how you remove each:

The proof you will show her that this will work this time (photos, spot report, moisture reading, local reviews):

Obstacle → Solution Map

Fifteen rows, all four categories: knowledge, skill, environment, psychology. Every obstacle you skip here comes back later as an objection in a hallway.

#	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: worth to her, cost to you. High value and low cost stays in the core. High value and high cost becomes a priced add-on. Everything else gets cut.

[illegible]

Guarantee and Offer Name

A promise you can afford to pay on, with the edges named out loud before the money changes hands.

What exactly you promise, and the window it applies inside:

What it does not cover — dye loss, bleach, pad contamination, wicking, anything flagged as set:

What honouring it costs you on a bad month, and whether you can pay that without flinching:

Three names for your main package — outcome plus timeframe. Circle the one you can say in a driveway:

Service Area and Jobs You Will Not Do

A circle you can actually run, and the list of work you turn down on purpose. Both belong in the van, not in your head.

Your circle: where you park, the ZIP codes inside twenty minutes, and the drive time at the worst hour of the day:

Your travel rule outside the circle — minimum job value, travel line, or the days you go that way anyway:

Your primary customer of the three (pet household, property manager, listing agent) and why that one:

Jobs you will not do, and who you refer each one to:

Ten-Competitor Scan

The first ten companies in the map results for your main ZIP code. Their promise, not their slogan — and read the mediocre reviews, because that is where the broken promise is written down.

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

Your One-Liner and Positioning Statement

One sentence: her problem, your plan, her success. Say it out loud in a driveway before you write the final version here.

The problem, in her words:

Your plan, in three steps she could repeat to her husband:

The success she gets, with the timeframe attached:

The whole one-liner in one breath (rewrite it until it fits on a voicemail greeting):

The long positioning statement you use to make decisions: for [who], we are the carpet cleaner who [outcome], because [reason]:

Entity, EIN and Bank Setup

One afternoon, in this order. Tick the date, not just the box — the dates become your renewal calendar.

- | | |
|--|------------|
| ☐ Decide the entity with your attorney or accountant, and write down why you chose it. | DATE _____ |
| ☐ File the formation paperwork with your state and save the confirmation as a PDF. | DATE _____ |
| ☐ Apply for the EIN online, free, directly with the tax authority. Print the confirmation letter. | DATE _____ |
| ☐ Open a business bank account using the entity documents and the EIN. | DATE _____ |
| ☐ Get a debit or credit card on that account and stop using your personal card for anything work-related. | DATE _____ |
| ☐ Call the state revenue department: are carpet cleaning services taxable here, residential and commercial?
Write down who told you. | DATE _____ |
| ☐ Register for sales tax collection if the answer was yes, and diarise the filing dates. | DATE _____ |
| ☐ Check the city and the county for a general business licence. Both, separately. | DATE _____ |
| ☐ Set up bookkeeping software or a spreadsheet before the first invoice, not after the tenth. | DATE _____ |
| ☐ Put every renewal date — entity, licence, insurance, certification — in one calendar with a reminder a month out. | DATE _____ |

License Requirements by State — Carpet Cleaning

The state-level picture for this trade, researched for this edition. Note what it does not say: a city or county business licence usually still applies, and hiring employees can add a registration. Confirm state, then county, then city — in that order.

STATE	LICENSE REQUIRED?	LICENSE	BOARD	FEE	EXAM
Kentucky	No statewide	—	Check city / county	—	No
Texas	No statewide	—	Check city / county	—	No
California	No statewide	—	Check city / county	—	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

Rules change — confirm with the board before you spend a dollar.

Insurance Lines and Annual Cost Ranges

Get three quotes on every line. On the general liability call, ask this out loud: does the policy cover damage to the item I am actually cleaning, and what does the endorsement cost if it does not?

COVERAGE	TYPICAL ANNUAL COST	WHAT IT COVERS	YOUR QUOTE
General liability	\$491–\$1,061	Damage or injury you cause to others	
Workers comp	3.5–9.5 per \$100 payroll	Your crew, hurt on the job	
Commercial auto	\$3,000–\$4,800	The truck and what it hits	
Bond	\$125–\$350	Not state-mandated for carpet cleaning in any of the researched states (no state ties a contractor license, and therefore a bond, to the trade). A janitorial/cleaning service (dishonesty) bond is commonly required by commercial clients and property managers instead. Coverage amount typically \$10,000-\$100,000 based on company size; premium is a small percentage of the bond amount.	
Tools & equipment		Theft from the truck or site	
Umbrella		Above the GL limit	

Insurance Quote Log

Three carriers per line, on the same limits, or you are comparing nothing. Note the renewal date in the decision column — that is when you shop it again.

CARRIER / AGENT	LINE	LIMITS	ANNUAL PREMIUM	DEDUCTIBLE	DECISION

Questions for Your Attorney and Accountant

One paid hour each, prepared. Take the answers away in writing and keep them with your formation documents.

- ☐ Which entity fits my situation in this state, and what does it cost me each year to keep it?
- DATE
- ☐ What has to be true for the liability protection to hold — what would pierce it?
- DATE
- ☐ Are carpet cleaning services subject to sales or use tax here, and does residential differ from commercial?
- DATE
- ☐ How should I handle a change to the job once I am on site, so the extra work is enforceable?
- DATE
- ☐ What does my guarantee expose me to, and how should it be worded so it means what I intend?
- DATE
- ☐ Does my liability policy cover damage to the carpet, rug, or upholstery I am working on?
- DATE
- ☐ When does a helper become an employee rather than a contractor, and what changes the day that happens?
- DATE
- ☐ What percentage should I set aside for taxes, and where should that money sit?
- DATE
- ☐ What do you want from me every month so that the year-end is not a fire drill?
- DATE
- ☐ What do people in my trade get wrong that ends up on your desk?
- DATE

Equipment Budget — Carpet Cleaning

Retail ranges at the time of research. Fill the Your price column twice if you can — once for used, once for retail — and buy the day-one items first. The Later rows are profit purchases, not startup purchases.

ITEM	LOW	HIGH	DAY ONE?	YOUR PRICE	BOUGHT
Professional-grade self-contained carpet extractor machine	\$1,500	\$4,000	Yes		
Carpet wand, stair tool and upholstery tool kit	\$111	\$799	Yes		
Carpet drying air mover / blower (1/4 HP to 3-speed commercial)	\$114	\$464	Yes		
Pump-up pre-spray sprayer and extraction hoses	\$100	\$300	Yes		
Carpet pre-spray chemical concentrate (1 gal. to case)	\$23	\$298	Yes		
Defoamer, protector, spotter and initial cleaning chemical supplies	\$200	\$500	Yes		
Upright/backpack vacuum for pre-vacuuming carpets	\$200	\$500	Yes		
Safety glasses, gloves and PPE work kit	\$17	\$70	Yes		
Pin-type moisture meter (post-cleaning drying verification)	\$460	\$820	Yes		
Truck-mount carpet cleaning system (production/growth-stage upgrade)	\$21,706	\$32,095	Later		
Heated carpet extractor package upgrade (extractor + powerhead + air mover + stair tool)	\$2,900	\$4,709	Later		
Compact spot/upholstery extractor (auto detailing & small-job add-on)	\$500	\$1,500	Later		
Essential equipment	\$2,725	\$7,751			

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

Total Startup Budget

Carry the essential equipment total forward from the previous page, then add the lines only you can fill in. The reserve line is not optional — it is the difference between a slow month and a closed business.

LINE	LOW	HIGH	YOUR NUMBER
Essential equipment (previous page)	\$2,725	\$7,751	
Used cargo van (2018-2019 Ford Transit 250, ~7-8 years old)	\$12,200	\$15,650	
General liability, year one	\$491	\$1,061	
Launch marketing	\$300	\$1,500	
Licenses and permits			
Software and phone, 3 months			
Personal runway (chapter 1)			
Reserve (10% of the total)			
Total startup	\$15,716	\$25,962	

Funding Sources

Every source you could actually reach, ranked by what it costs and what it does to you if the first quarter goes badly. Fill the Speed column honestly — a cheap loan you cannot get for six weeks is not available to you.

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

Client-Financed Acquisition Plan

The cash from today's customer buys tomorrow's customer. Decide the number now, before the money is in your hand and already has a job.

The share of every job that goes straight back into marketing, and the account it lives in:

What job one's money buys. What job two's money buys. What job five's money buys:

Your deposit rule for large or far-out bookings, and the script you use to ask for it:

Your residential-to-commercial mix, and what you will do when commercial invoices run past terms:

Typical Jobs and Price Ranges — Carpet Cleaning

Researched market ranges, with the per-hour column doing the honest arithmetic for you. Fill the Your price column after you know your break-even rate — not before.

TYPICAL JOB	LOW	HIGH	HOURS	PER HOUR (HIGH ÷ HOURS)	YOUR PRICE
Single-room carpet cleaning (flat per-room rate)	\$75	\$125	0.5	\$250	
Whole-house carpet cleaning (typical single-family home)	\$123	\$242	2	\$121	
2-3 room carpet cleaning package	\$169	\$239	1.5	\$159	
4-5 room whole-home carpet cleaning package	\$299	\$379	2.5	\$152	
Carpeted staircase cleaning (standard flight)	\$59	\$99	0.5	\$198	
Upholstery cleaning — loveseat to standard sofa (bundled with carpet visit)	\$129	\$149	1	\$149	
Pet urine/odor treatment (localized to multi-spot)	\$99	\$169	0.75	\$225	
Carpet protector application (1-4 rooms)	\$35	\$140	0.5	\$280	

Crews in this trade bill \$60–\$100 an hour (quoted per room (flat \$75-\$125/room) or per sq ft (\$0.20-\$0.40); some jobs quoted flat per package). Technicians earn \$18–\$21 an hour.

Good / Better / Best Builder

Build the largest one first, because that is the one you say first. Each tier must differ in what is included, not only in price — otherwise you are discounting the same job and she can tell.

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

Break-Even Hourly Rate

Billable hours means hours a customer pays for. Drive time, quoting, phone calls, and cleaning the machine are real work and none of them are billable — count them out.

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

Fill this once and tape it inside the van door. Markup is measured against your cost; margin is measured against her price. They are never the same number and the gap is your year.

JOB COST	MARKUP %	PRICE	MARGIN %

Add-On Attachment Tracker

The add-ons are sold in a house you are already standing in, with the machine already running. Track how often you offer each one and how often it lands — the offer rate is the number you control.

ADD-ON	PRICE	TIMES OFFERED	TIMES TAKEN	ATTACH RATE	WHAT YOU WILL SAY NEXT TIME

Your Attraction Offer

A first step that is genuinely useful to her and quietly diagnostic for you. If it does not get you inside the house, it is a coupon, not an attraction offer.

Your attraction offer in one sentence, and what it costs you to deliver:

What it reveals that she did not know — the three things you look for every time:

The offer that solves what it reveals, and the exact moment in the visit you make it:

What you will say when the honest answer is that she does not need the work:

Upsell and Downsell Plan

Upsells happen at the moment the new problem becomes visible to her. Downsells change the terms or the scope — never the price of the same job.

Upsell one: what it is, what it costs her, and where in the visit you offer it:

Upsell two: same three answers:

Your three downsells — split the work, shrink the scope, move the date. Write the words you will use:

How you book the next visit before you leave the driveway:

Continuity or Referral Plan

This trade has a real recurring product because the recommended cleaning cycle is measured in months and nobody remembers it. Run the referral asks alongside it, not instead of it.

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

Job-Start Checklist

Every item is a complaint you will never receive. None of them takes more than a minute, which is exactly why they get skipped on busy days.

☐ Confirm you are inside the arrival window. If not, text before the window closes.	DATE _____
☐ Walk the whole job with the customer before anything comes off the van.	DATE _____
☐ Mark every spot together and say out loud which will lift and which will not.	DATE _____
☐ Identify the fibre and check for dye instability in an inconspicuous spot.	DATE _____
☐ Confirm the price in writing, including anything added at the door, and get the yes.	DATE _____
☐ Photograph every spot and any pre-existing damage — pet damage, dye loss, wear, snags.	DATE _____
☐ Put down floor protection at the entry and on any hard floor you will cross.	DATE _____
☐ Move what you agreed to move; note what stays and why.	DATE _____
☐ Pre-vacuum every room. Every time. No exceptions on a busy day.	DATE _____
☐ Check the water source, the power circuit, and where you will run hoses without propping a door open.	DATE _____
☐ Ask where the pets are and confirm who is keeping them there.	DATE _____
☐ Set the expectation out loud: how long, how wet, when they can walk on it.	DATE _____

Job-Close Checklist

The review is won in the last ten minutes, not in the middle of the job. Do the walk-through while she is happy and standing on it.

- | | |
|---|------------|
| ☐ Second walk-through with the customer, room by room. | DATE _____ |
| ☐ Point at the spot that did not fully lift before she finds it, and explain why. | DATE _____ |
| ☐ Take a moisture reading in the wettest rooms and tell her the number. | DATE _____ |
| ☐ Set air movers where they are needed and explain how long to leave them. | DATE _____ |
| ☐ Put furniture back on blocks and tabs; tell her when the tabs can come out. | DATE _____ |
| ☐ After photos of everything you photographed at the start. | DATE _____ |
| ☐ Collect payment and send the receipt before you leave the driveway. | DATE _____ |
| ☐ Offer the next thing: the stairs, the sofa, the next visit, the membership. | DATE _____ |
| ☐ Ask for the review, out loud, in the clean room. | DATE _____ |
| ☐ Count your tools out loud against the load list. Every hose, every tool, every cord. | DATE _____ |
| ☐ Gate latched, doors locked, keys and codes back where the log says they go. | DATE _____ |
| ☐ Driveway and entry left cleaner than you found them. | DATE _____ |
| ☐ Text the care card the same evening with the drying and re-soiling instructions. | DATE _____ |

Family Worksheet

Chemicals, keys, and route density — the three things that separate a cleaning company from a person with a machine.

Your SDS binder: every product you carry, where the binder lives, and who else can find it:

Your dilution card: product, ratio, and the measuring tool you will actually use in a driveway:

Your key and code custody log: what you hold, how it is labelled, where codes are stored:

Your named days by ZIP code, and the exact words you use to offer the route day first:

Your route rule for a job outside the circle — the minimum, the day, or the neighbour you will ask for:

Equipment Log

Boring to keep and worth real money in a year, when you are deciding whether to rebuild the machine or replace it — and what this van actually costs you per job.

Your Warm 100 — 1 of 2

Every name in your phone, top to bottom, until you have a hundred. All of them have floors. Twenty a day and you are finished inside a week — then work it again in ninety days.

#	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

A complete solution to one small problem, given away, that reveals the bigger problem you get paid for. If it does not reveal a next problem, it is a coupon.

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

Acquisition cost is spend divided by customers who actually paid — never by leads. Aim for lifetime gross profit at least three times acquisition cost.

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

Pick the one row that matches your channel and fill it every working day, including the days it feels pointless. Twelve weeks of columns, because that is about how long it takes — and about how long before most people quit.

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

Map Listing and Review Engine

Free, and in this trade it is where the demand actually lands. Finish it tonight, then feed it every week.

☐ Claim and verify the business profile on the map.	DATE _____
☐ Set the primary category correctly, then add every secondary service you actually offer.	DATE _____
☐ Write a description that names the service and the area once, in plain language.	DATE _____
☐ List every service with its own short description — rooms, stairs, upholstery, pet treatment, protector.	DATE _____
☐ Set hours you will actually answer, and a service area that matches your circle.	DATE _____
☐ Upload before-and-after photos from real jobs, in the same light, with descriptive filenames.	DATE _____
☐ Post something short every few days: a spot solved, a tip, a finished room.	DATE _____
☐ Ask every customer for a review in the room, before you leave. Every customer, not just the happy ones.	DATE _____
☐ Never offer anything of value in exchange for a review, and never gate who you ask.	DATE _____
☐ Reply to every review within two days, naming the service back.	DATE _____
☐ Answer the questions section yourself with the questions customers actually ask.	DATE _____
☐ Check the profile monthly for changes you did not make.	DATE _____

Estimate Visit Checklist

Run this in order on every estimate, including the easy ones. The sale is a sequence, and the sequence is what stops you discounting yourself in a hallway.

- | | |
|--|------------|
| ☐ Arrive inside the window, shoes covered, and ask before you walk anywhere. | DATE _____ |
| ☐ Walk every room she named, plus one she did not. | DATE _____ |
| ☐ Get low with a light on the traffic lanes and the edges. | DATE _____ |
| ☐ Ask which spot made her pick up the phone. | DATE _____ |
| ☐ Identify fibre and check an inconspicuous area for dye instability. | DATE _____ |
| ☐ Ask about pets and whether anything has reached the pad. | DATE _____ |
| ☐ Name the risks out loud: what will not lift, and why. | DATE _____ |
| ☐ Ask what else she would want looked at — stairs, upholstery, basement. | DATE _____ |
| ☐ Show proof: before-and-after photos of the same problem, not stock images. | DATE _____ |
| ☐ Hand over the certificate of insurance without being asked for it. | DATE _____ |
| ☐ Present three written options with what is included in each, then stop talking. | DATE _____ |
| ☐ Answer the objection you hear, not the sentence she used. | DATE _____ |
| ☐ Book the date and take the deposit before you leave the house. | DATE _____ |
| ☐ Leave the spot card whether or not she books. | DATE _____ |

Objections and Replies — Carpet Cleaning

The objections this trade really hears, with what each one actually means. Write the reply column in your own words — a script in somebody else’s voice sounds like a script.

WHAT THEY SAY	WHAT IT REALLY MEANS	YOUR REPLY
Your price is higher than the guy who left the flyer on my door.	I cannot tell the difference between you two, so I am deciding with the only number I understand.	
Can you get this stain out?	I am afraid you will take my money and the stain will still be sitting there.	
I have a rental machine in the garage.	I think this is a Saturday chore, not a purchase.	
Let me talk to my husband about it.	I do not have the authority, or I am not sold and this is the polite exit.	
How long before I can walk on it?	I am worried you are going to wreck my day and my house.	
Can you come Saturday?	My schedule matters to me more than your price does.	
We are replacing the carpet next year anyway.	I do not want to spend money on something I am about to throw in a dumpster.	

Review Request Script

Asked out loud in the clean room, this is the highest-paid sentence of your week. Write it, then say it aloud until it stops sounding like a favour.

Your ask, word for word — the version you can say level, without apologising for it:

How and when you send the link (before the driveway, not that evening) and what the text says:

What you say instead when something is not right, so you hear it before the internet does:

Your public reply template for a bad review: thank, name, fix, take it offline:

Where reviews get asked for on jobs you did not personally close, and who is accountable:

Estimate Follow-Up Log

Most quotes are lost to silence, not to price. Every estimate that did not book gets one call and one text, then goes on the ninety-day list.

[illegible]

First-Hire Scorecard

Score every candidate on the same rows, filled in before you meet anybody. A scorecard written after the interview is just a record of who you already liked.

WHAT YOU ARE MEASURING	WHAT GOOD LOOKS LIKE	CANDIDATE 1	CANDIDATE 2	CANDIDATE 3
Shows up on time — to the call and the working interview				
Comfortable in a stranger's home				
Tells the truth about a mistake				
Physical reality of the work — hose, stairs, furniture				
Driving record and licence				
Follows a written checklist without shortcuts				
Explains something simply to a customer				
Availability on your named route days				
Reference: alone in your mother's house?				
Pay expectation against your burdened cost				
Working-interview day: jobs completed, re-work needed				
Would you ride behind him unannounced and expect to find nothing?				

30 / 60 / 90 Ramp Plan

Write this before the offer, not after the first bad week. Review it out loud on the last Friday of each month with the page between you.

STAGE	WHAT HE CAN DO UNSUPERVISED	WHAT YOU TRAIN THAT MONTH	HOW YOU MEASURE IT	PASS / NOT PASS
Week 1 — safety, chemistry, protection				
Week 2 — pre-vacuum and job-start checklist				
Week 3 — ride-behind and correction				
Day 30 review				
Days 31–45 — wand on straightforward rooms				
Days 46–60 — customer conversation and expectations				
Day 60 review				
Days 61–75 — simple job solo, you on call				
Days 76–90 — close, collect, ask for the review				
Day 90 decision				

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

Write your own name in every box you currently fill. The box you most want out of is your next hire — and it is rarely another wand.

At \$250k: who runs the wand, who answers the phone, who sells, who does the books?

At \$500k: what changed, what did you stop doing, and who owns the schedule?

At \$1M: the crews, the working manager, the office — and what your own week looks like:

The box you want out of first, and the trigger that says it is time to fill it:

What you will never delegate, and why that is a decision rather than a habit:

Questions for Your Accountant Before the First Payday

Ask these in writing and keep the answer. Worker classification is decided by tests, not by preference, and the cheap-looking road has a toll booth at the end.

- | | |
|--|------------|
| ☐ Given how I schedule and supply this person, is he an employee or a contractor? | DATE _____ |
| ☐ What do I register for, and with whom, before the first payroll run? | DATE _____ |
| ☐ Do I need workers' compensation coverage in my state at this headcount? | DATE _____ |
| ☐ How do I document a paid working interview? | DATE _____ |
| ☐ What records must I keep, and for how long? | DATE _____ |
| ☐ What changes when the second person is hired? | DATE _____ |
| ☐ How should overtime be handled on long route days? | DATE _____ |
| ☐ What does a bonus do to payroll tax and to my workers' compensation premium? | DATE _____ |

Twelve-Month Forecast

The demand index is this trade's own five-year search pattern with the growth trend stripped out. Build your flat year first, then multiply each month by its index and plan the trough while you are still inside the peak.

MONTH	MONTH	DEMAND INDEX	JOBS PLANNED	AVG TICKET	REVENUE
Jan	0.83				
Feb	0.87				
Mar	0.95				
Apr	1.05				
May	1.05				
Jun	1.15				
Jul	1.14				
Aug	1.11				
Sep	1.03				
Oct	1.00				
Nov	0.96				
Dec	0.86				
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

Money in and money out, in the order it actually moves. Profit is an opinion; this page is the fact.

Profit First Allocations

Every deposit gets split the day it lands. What is left in operating is what you can spend — and it is smaller than you think, which is the whole point.

ACCOUNT	WHAT IT IS FOR	SHARE OF EACH DEPOSIT	WHERE IT IS HELD	TRANSFER DAY
Income (sorting office — nothing is spent from here)				
Profit (untouchable; distribution once a quarter)				
Owner pay (a real wage on a real date)				
Tax (moved the day the money arrives)				
Operating expenses (chemistry, fuel, insurance, software, marketing)				
Equipment replacement (the machine that will fail on a Saturday)				
Slow-season reserve (funded in the peak, spent in the trough)				

KPI Scorecard — Carpet Cleaning

The benchmarks are printed for you. Fill your own column in pen every month, especially in the months you would rather skip — and read them as a set, because any one of them alone will lie to you.

MEASURE	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12
Healthy net profit margin target (target 40%)												
Achievable net profit margin ceiling (target 50%)												
Average job value (solo technician route) (target 180 USD)												
Target jobs completed per technician per day (target 3 jobs/day)												
Full-time solo-operator gross annual revenue floor (target 75,000 USD/yr)												
Manufacturer/CRI-recommended professional cleaning interval (target 18 months)												
IICRC Carpet Cleaning Technician (CCT) certification cost (target 379 USD)												

WEEK NOTES

Monthly P&L

The one report you read every month: this month, last month, and the same month a year ago. Revenue up with gross margin down is the warning that matters most.

[illegible]

Days 1–30: Get Cash

Every item is either a legal prerequisite or a revenue action. If a task is neither, it belongs to a later month or to nobody.

☐ Entity formed and EIN issued.	DATE _____
☐ Business bank account open and separate from your own money.	DATE _____
☐ General liability bound; commercial auto in force on the vehicle you actually drive.	DATE _____
☐ City or county business licence filed; state requirement confirmed in writing.	DATE _____
☐ Essential equipment only, bought against the chapter 5 list.	DATE _____
☐ Map listing claimed and every field finished.	DATE _____
☐ Attraction offer written in one sentence you can say on the phone.	DATE _____
☐ Warm 100 list written out in full — all hundred names.	DATE _____
☐ Twenty warm contacts a day until the list is finished.	DATE _____
☐ Price list built from the break-even hourly rate, not from a competitor's flyer.	DATE _____
☐ First paying job booked inside two weeks.	DATE _____
☐ First job run to the full job-start and job-close standard.	DATE _____
☐ Payment collected on site; review asked for in the room.	DATE _____
☐ Tax account opened and the first transfer moved the day you were paid.	DATE _____

Days 31–60: Get More Cash

Month two takes the money already standing in front of you. Same jobs, same miles, more revenue — plus the one uncomfortable hour that pays for the whole quarter.

- | | |
|--|------------|
| ☐ Add-on offered out loud at the second walk-through on every single job. | DATE _____ |
| ☐ Protector, stairs, upholstery, and pet treatment each priced and rehearsed. | DATE _____ |
| ☐ Price raised once, on the next ten estimates only. | DATE _____ |
| ☐ Track how many of those ten walked — that number is your answer, not your feelings. | DATE _____ |
| ☐ Named route days set by ZIP code and held for four full weeks. | DATE _____ |
| ☐ Route day offered to the caller before any other date. | DATE _____ |
| ☐ Spot card printed and handed out on every job, booked or not. | DATE _____ |
| ☐ Review asked for in the room on every job; link sent before the driveway. | DATE _____ |
| ☐ Every review replied to inside two days. | DATE _____ |
| ☐ Estimate follow-up log started — one call and one text on every unbooked quote. | DATE _____ |
| ☐ Friday office hour held all four weeks without giving it away. | DATE _____ |
| ☐ Scorecard column filled in for the month, in pen. | DATE _____ |

Days 61–90: Get the Most Cash

Month three turns one-off jobs into a repeat cycle and answers the hire question with arithmetic instead of a feeling.

☐ Membership offer built, priced by room count, and offered at every close.	DATE _____
☐ First members signed and their next visit already on the calendar.	DATE _____
☐ Referral ask built into the close, word for word.	DATE _____
☐ Referral thank-you decided and actually sent.	DATE _____
☐ Commercial list started: property managers, offices, churches, daycares.	DATE _____
☐ Certificate of insurance ready to hand over on request.	DATE _____
☐ Twelve-month forecast built and the slow-season reserve funded from peak months.	DATE _____
☐ Hire test run: four weeks of turned-away work, full pipeline, prices high enough.	DATE _____
☐ First-hire scorecard filled in before meeting anybody.	DATE _____
☐ Ramp plan written before any offer is made.	DATE _____
☐ Quarterly price review scheduled on the calendar.	DATE _____
☐ Decision log reviewed: what you decided, what happened, what you would change.	DATE _____

Milestones and Tripwires

Decide the response before the emotion arrives. A tripwire is an observable signal plus an action you already committed to in writing, while calm.

MILESTONE OR FAILURE MODE	TARGET DATE	THE SIGNAL, WEEKS EARLY	YOUR TRIPWIRE ACTION	DONE / TRIGGERED
First paying job booked				
Warm 100 fully contacted				
Break-even hourly rate calculated				
Insurance bound before first job				
Price raised once				
Add-on offered on every job				
Route days held four weeks				
First member signed				
Reserve falls below your line				
Two months of falling bookings				
Working seven days a week				
Hire test passed on all three questions				

Decision Log

Every real decision with the date, what you expected, and what actually happened. In a year this is the most valuable page in the book, because it is the only one that grades you.

[illegible]