

The Starving-Crowd Test for Your ZIP Codes

Three ZIP codes. Three criteria each. Write the evidence you actually saw this week, not the score you are hoping for.

The three ZIP codes you can cover inside a twenty-minute drive of your house, and why those three:

PAIN — drive them. How many pools did you see, and how many were green, cloudy or obviously unattended?

PURCHASING POWER — build decade of the subdivisions, in-ground versus above-ground, and who can pay monthly:

TARGETABILITY — how you reach these same streets cheaply and repeatedly, and what one attempt costs you:

Your Homeowner Avatar

One person, not a category. Describe her the way you would to somebody who has to go and stand in her back yard tomorrow.

Who she is: the house, the pool, how the pool got there, and what she actually wants from it:

What she is afraid of when a stranger has her gate code — in her words, not in yours:

What she typed into her phone the last time the water turned on her:

What she has already tried, who stopped answering, and what that failure ended up costing her:

Personal Runway Worksheet

Household costs only — the business budget lives in chapter 5. Total it, divide your savings by the total, and write the months at the bottom. If your route is northern, check whether that number crosses a whole winter.

Demand by Month — Pool Service

The printed index is a reconstruction of this trade's seasonal shape from published patterns, not exported measurement data. Treat it as the picture of a curve, then write your own climate beside it — your opening month, your closing month, and the months you will bill nothing.

MONTH	DEMAND INDEX	POOLS YOU EXPECT	REVENUE YOU EXPECT	WHAT YOU WILL DO IN THE COLD MONTHS
Jan	0.60			
Feb	0.73			
Mar	0.91			
Apr	1.14			
May	1.53			
Jun	1.60			
Jul	1.38			
Aug	1.06			
Sep	0.94			
Oct	0.78			
Nov	0.68			
Dec	0.65			
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 contains a chemical name, it is your language and it does not belong on this page.

What she is doing on the Saturday morning after this has worked — describe the scene, not the service:

The worry you are removing, written the way she would say it to her sister:

Your timeframe: clear by when, steady by when, and what you promise on a pool that is already green:

Why she should believe you rather than the last two people who told her something similar:

Obstacle → Solution Map

Fifteen rows. Category is one of: knowledge, skill, environment, psychology. The offer is finished when every row has a reversal written beside it.

#	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 value to her and cost to you out of ten. High value and low cost stays in the core. The middle becomes a bonus. The rest gets cut without ceremony.

[illegible]

Guarantee and Offer Name

Write the promise and its exclusions on one page, in one size of type. That is the entire discipline.

The promise: what fails, over what period, and exactly what you do about it at your own cost:

The exclusions, plainly — equipment off or failed, declined repairs, low water, somebody else dosing it, stains and scale, leaks:

Could you personally deliver that remedy this week, with the truck you have and the route you run? If not, what changes:

Three candidate names. Say each out loud to somebody, then write which one they repeated back correctly:

Service Area and Jobs You Will Not Do

Written in a quiet kitchen, not in a driveway. Every line on this page will be tested by a pleasant person in your first spring.

Your zones: name each cluster of subdivisions and the day of the week it belongs to:

The ideal stop, attribute by attribute — pool type, equipment, access, owner:

The work you refuse outright, and the licensed trade or specialist you hand each one to:

Your trip minimum, and the one condition under which you will take a stop outside a zone:

[illegible]

Ten-Competitor Scan

Ten companies in your zones. Call every one of them at eleven on a Tuesday and write down what actually happened when you did.

COMPANY	RATING	ANSWERED?	PRICE SIGNAL	THEIR PROMISE	WHAT THE ONE-STAR REVIEWS SAY

Your One-Liner and Positioning Statement

Problem, then plan, then what her life looks like afterwards. In that order. One sentence, said out loud until it stops sounding written.

The problem, in her words — pulled straight from your competitors' one-star reviews:

Your plan, in three steps a homeowner could repeat to somebody else:

The success: what she stops doing, stops worrying about, or stops paying for:

The whole thing as one sentence. Rewrite it until you can say it without breathing in the middle:

Where it goes: truck, shirt, voicemail greeting, map profile, the tag on the equipment pad:

Entity, EIN and Bank Setup

In order. Skip the separation of money and the entity stops protecting anything at all.

- | | |
|--|------------|
| ☐ Choose the entity with your accountant — sole proprietorship, LLC, or an S-corporation election on top of one | DATE _____ |
| ☐ Register with your state; record both the filing date and the annual renewal date | DATE _____ |
| ☐ Apply for the federal tax identification number online and save the confirmation letter somewhere you can find it | DATE _____ |
| ☐ Open a business bank account using it, and stop using the personal account that same day | DATE _____ |
| ☐ Get a card in the business name for chemicals and fuel | DATE _____ |
| ☐ Register the business name with your city or county if a separate registration applies | DATE _____ |
| ☐ Ask your accountant about sales tax on chemicals and about buying on a resale certificate | DATE _____ |
| ☐ Ask your accountant how to hold and account for prepaid seasons before you take any | DATE _____ |
| ☐ Open a separate savings account for tax and fund it on every deposit | DATE _____ |
| ☐ Call your state board, confirm where the service and contracting line falls, and write it inside the front cover | DATE _____ |

License Requirements by State — Pool Service

Most of these states do not licence routine route service at all — the credentials below are the ones that attach to contracting work. Confirm your own row on the board's own site before you budget anything.

STATE	LICENSE REQUIRED?	LICENSE	BOARD	FEE	EXAM
Kentucky	No statewide	—	Check city / county	—	No
Texas	No statewide	—	Check city / county	—	No
California	Yes	C-53 Swimming Pool Contractor (CSLB)	California Contractors State License Board (CSLB)	\$450–\$650	Yes
Florida	Yes	Certified Pool/Spa Contractor — Service (CPC-Service, Class C)	Florida DBPR — Construction Industry Licensing Board (CILB)	\$215–\$295	Yes
New York	No statewide	—	Check city / county	—	No
Pennsylvania	Yes	Home Improvement Contractor (HIC) Registration	Pennsylvania Office of Attorney General	\$100	No
Illinois	No statewide	—	Check city / county	—	No
Ohio	No statewide	—	Check city / county	—	No
Georgia	No statewide	—	Check city / county	—	No
North Carolina	Yes	General Contractor License (Swimming Pools specialty)	NC Licensing Board for General Contractors (NCLBGC)	\$75–\$125	Yes
Michigan	No statewide	—	Check city / county	—	No
Arizona	Yes	Swimming Pool Specialty Contractor Classification (R-37/C-37/CR-37)	Arizona Registrar of Contractors (ROC)	\$720–\$850	Yes

Federal: CPO (Certified Pool & Spa Operator) certification, PHTA (Widely expected by employers, insurers, HOAs and some municipalities for servicing pools/spas (especially commercial); NOT a legal state license and not mandatory in most states for basic residential route service). Rules change — confirm with the board before you spend a dollar.

Insurance Lines and Annual Cost Ranges

Published ranges for this trade. Where you land inside each band is driven mostly by your state, your payroll and whether you touch equipment — so treat these as the shape of the bill, not the bill.

COVERAGE	TYPICAL ANNUAL COST	WHAT IT COVERS	YOUR QUOTE
General liability	\$800–\$2,500	Damage or injury you cause to others	
Workers comp	2.5–8 per \$100 payroll	Your crew, hurt on the job	
Commercial auto	\$2,244–\$4,944	The truck and what it hits	
Bond	\$25,000–\$25,000	No bond is required for basic route-based cleaning/chemical service in most states. Where a full pool CONTRACTOR license is required (construction, remodel, repair over a labor+materials threshold), a bond typically follows: California's CSLB requires a \$25,000 contractor license bond for all classifications including C-53, effective Jan 1, 2023 per Senate Bill 607. Florida's CPC-Service (Class C) and Arizona's ROC pool specialty license do not carry a separate state-mandated pool-specific bond beyond standard licensing/insurance requirements per the sources reviewed.	
Tools & equipment		Theft from the truck or site	
Umbrella		Above the GL limit	

Insurance Quote Log

Quote the same limits and the same deductible with every carrier, or you are comparing salespeople instead of coverage. Use the last column for the chemical-exclusion answer, in writing.

CARRIER / AGENT	LINE	LIMITS	ANNUAL PREMIUM	DEDUCTIBLE	CHEMICAL EXCLUSION?

Questions for Your Attorney and Accountant

One paid hour each. Take this page with you and write the answers in the margin.

- ☐ Which entity fits my situation, and what must I do every year to keep it standing?
- DATE
- ☐ Exactly where does my state draw the line between servicing a pool and contracting on one?
- DATE
- ☐ What has to be in my written service agreement here, and what may I not put in it?
- DATE
- ☐ How do I word a water-clarity guarantee so it means what I intend and nothing more?
- DATE
- ☐ Does my general liability policy exclude chemical or pollution incidents, and what closes that gap?
- DATE
- ☐ What is my exposure when I refer a customer to a licensed trade, and how do I reduce it?
- DATE
- ☐ Do I owe sales tax on chemicals I supply, and can I buy them on a resale certificate?
- DATE
- ☐ How do I hold and account for money customers prepay for a season I have not delivered?
- DATE
- ☐ What are the tests that decide whether my first technician is a subcontractor or an employee?
- DATE
- ☐ What records must I keep, for how long, and in what form — including chemical records?
- DATE
- ☐ What are my rights if a customer stops paying, and what deadline starts them?
- DATE

Equipment Budget — Pool Service

Day-one items first. Ranges are published cost-guide figures rather than live retail listings, so price two of them locally before you trust the column. The total at the bottom is essentials only.

ITEM	LOW	HIGH	DAY ONE?	YOUR PRICE	BOUGHT
Digital/liquid water test kit and test strips	\$100	\$300	Yes		
Telescoping pole, skimmer net, wall brush, and manual vacuum head/hose	\$300	\$600	Yes		
Pump, filter cleaner, power washer, and portable vacuum	\$600	\$2,000	Yes		
Initial chemical inventory (chlorine, pH/acid adjusters, algaecide)	\$500	\$1,000	Yes		
PPE (chemical-resistant gloves, eye protection, closed-toe shoes, first aid kit, chemical storage)	\$50	\$200	Yes		
Basic repair tool set (screwdrivers, wrenches, pool thermometer, small parts)	\$500	\$1,200	Yes		
Work-vehicle racking, shelving, ladder rack, and branding/decals for route vehicle	\$3,000	\$8,000	Yes		
Route paperwork, uniforms/branded shirts, vehicle signage, and business setup supplies	\$400	\$800	Yes		
Automatic/robotic pool cleaner (optional upsell tool)	\$500	\$1,500	Later		
Extended testing supplies and chemical restock (first 60-90 days)	\$800	\$1,500	Later		
Upgraded/powered vacuum hose system (beyond basic manual head)	\$500	\$2,000	Later		
Bulk chemical restock inventory (larger-scale / multi-route)	\$1,000	\$3,000	Later		
Essential equipment	\$5,450	\$14,100			

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

Total Startup Budget

The printed low and high come from the ranges in this chapter. The blank column is the only one that matters — and if you already own the truck, strike that line out before you total anything.

LINE	LOW	HIGH	YOUR NUMBER
Essential equipment (previous page)	\$5,450	\$14,100	
Used cargo van or pickup with rack (route vehicle)	\$8,000	\$30,000	
General liability, year one	\$800	\$2,500	
Launch marketing	\$300	\$1,000	
Licenses and permits			
Software and phone, 3 months			
Personal runway (chapter 1)			
Reserve (10% of the total)			
Total startup	\$14,550	\$47,600	

Funding Sources

Cheapest and safest at the top. If you cannot write the annual cost as a plain figure, write UNKNOWN and treat it as expensive.

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

Client-Financed Acquisition Plan

The arithmetic that decides whether the route funds itself or eats your savings. Do it on real jobs, not on hopeful ones.

What one seasonal or repair job puts in your account this week, after chemicals and fuel:

What it costs you to win one route stop — advertising, door hangers, quoting time, fuel:

How many route stops one week of seasonal work can buy. Show the arithmetic, not the hope:

Your conversion line: the exact words you use to offer the route before leaving an opening job:

Typical Jobs and Price Ranges — Pool Service

Published national ranges with an hours column. Time three of your own jobs wheels-to-wheels and write the real hours over the printed ones — your times are the ones your prices have to survive.

TYPICAL JOB	LOW	HIGH	HOURS	PER HOUR (HIGH ÷ HOURS)	YOUR PRICE
Weekly pool cleaning/maintenance visit	\$80	\$150	1	\$150	
In-ground spring pool opening	\$250	\$400	2	\$200	
Fall pool closing/winterization	\$250	\$1,200	2.5	\$480	
Green-to-clean algae recovery / deep clean	\$250	\$600	4	\$150	
Sand/cartridge filter cleaning or replacement	\$150	\$500	1.5	\$333	
Pump motor repair (not full replacement)	\$50	\$300	2	\$150	
Leak detection service	\$100	\$500	2	\$250	

Crews in this trade bill \$45–\$65 an hour (flat pricing). Technicians earn \$24–\$29 an hour.

Good / Better / Best Builder

Three real versions of the same route stop. Show Best first. If you would not be pleased to sell an option every day of the week, take it off the page.

	GOOD	BETTER	BEST
Name			
Visit cadence			
Chemicals in or out			
What is included across the year			
What is billed separately			
Monthly price			
Guarantee			
Who buys it			
Anchor shown first?			

Break-Even Hourly Rate

Every fixed monthly cost, divided by the hours you can honestly bill. Be brutal about the divisor — drive time, quoting and chasing money are not billable hours.

LINE	MONTHLY AMOUNT	NOTES
Your pay		
Insurance (all lines)		
Vehicle payment + fuel		
Software + phone		
Tools, repairs, replacements		
Marketing		
Other fixed		
TOTAL monthly nut		
Stops per week		
Minutes at the average stop		
Billable hours per month		
Break-even hourly = nut ÷ hours		

Markup vs Margin Table

Fill it once, tape it inside the truck, and stop doing this arithmetic in a driveway with somebody watching you do it.

JOB COST	MARKUP APPLIED	PRICE	MARGIN YOU ACTUALLY GOT

Your Attraction Offer

The small, cheap, honest first thing a stranger buys. In this trade it is a diagnosis, and you charge for it.

What you inspect and test, in what order, and how long the whole visit takes:

What is physically in her hand when you leave, and what you keep a copy of:

The fee, and exactly how it credits against the first month if she starts the route:

The three things this report most often uncovers, and the offer that solves each:

Upsell and Downsell Plan

Decide these at a kitchen table now, so you are not improvising them on your knees at an equipment pad in July.

Your five most common findings, and the priced job each one leads to:

How you show her the problem, and the words you use to price it on the spot:

Your three downsells — what changes about the payment, the scope, or the term:

The line you will not cross, in your own words, for the days when money is tight:

Continuity or Referral Plan

This trade has a true subscription, which most do not. Design it here: term, billing, payment method, service day, renewal, and what happens when somebody wants out.

ELEMENT	YOUR DECISION	WHY	WHERE IT IS WRITTEN DOWN
Agreement term			
Billing date and cadence			
In advance or in arrears			
Payment method (default)			
Fixed service day			
Chemicals in or billed			
Cool-weather cadence			
Price increase timing			
Renewal and notice			
Cancellation terms			
What the guarantee covers			
Referral ask and reward			

Cancellations and Save Plays

One line every time somebody leaves. Ask why once, without arguing, and write the real answer rather than the polite one.

Route Book — What One Stop Is Worth

The asset, counted. Update it on the first of every month; this is the page a broker, a lender or a buyer would want to see first.

Job-Start Checklist

Before the pole comes off the truck. Run it on the routine stops too — those are the ones that go quietly wrong.

- | | |
|--|------------|
| ☐ Route order set for the day; gate codes and access notes pulled up before you leave the drive | DATE _____ |
| ☐ Chemicals loaded separated, upright, strapped, and in containment | DATE _____ |
| ☐ Protective equipment on the truck and not at home: goggles, chemical gloves, clean water | DATE _____ |
| ☐ Arrival note sent where the customer asked for one | DATE _____ |
| ☐ Gate latched behind you before anything else — every time, including when nobody is home | DATE _____ |
| ☐ Dog confirmed in or out, and children accounted for before a lid comes off anything | DATE _____ |
| ☐ Walk the pool and the pad before you touch the water; photograph anything already wrong | DATE _____ |
| ☐ Pump and timer confirmed running before you dose anything | DATE _____ |
| ☐ Filter pressure read against the clean number written on the tank | DATE _____ |
| ☐ Test panel run and written down before a single chemical is opened | DATE _____ |

Chemical Handling and Storage Standard

Post it where the chemicals live and where a helper can read it. This page is not about tidiness.

☐ Chlorine and acid stored in separate, physically divided compartments — never one shelf	DATE _____
☐ Everything upright, strapped, and in secondary containment before the vehicle moves	DATE _____
☐ Storage ventilated, shaded, off the ground, and locked	DATE _____
☐ One chemical, one container, one dedicated scoop — labelled and never reused for anything else	DATE _____
☐ Acid into water, never the reverse; slowly and downwind	DATE _____
☐ Nothing dosed with the pump off; broadcast rather than poured into a skimmer	DATE _____
☐ Goggles, chemical gloves and closed shoes on every dose, without exception	DATE _____
☐ Safety data sheet binder in the truck and current for every product you carry	DATE _____
☐ No chemicals ever left at a customer's property, for any reason, for any length of time	DATE _____
☐ Spill kit on board, and the response rehearsed before you need it	DATE _____
☐ Insurer told in writing exactly what you carry and how you carry it	DATE _____
☐ Helper trained and signed off on this page before their first solo day	DATE _____

Job-Close Checklist

Leave nothing for her to find later. This is the list your reviews are actually written from.

☐ Walls and steps brushed; waterline wiped	DATE _____
☐ Surface skimmed and the floor vacuumed or the cleaner reset	DATE _____
☐ Skimmer and pump baskets emptied and refitted	DATE _____
☐ Filter pressure recorded against the clean number; serviced or scheduled if it is up	DATE _____
☐ Chemistry dosed to target and the readings written on the tag	DATE _____
☐ Every lid, cap and container closed, counted and back on the truck	DATE _____
☐ Equipment left running as you found it, with the timer confirmed	DATE _____
☐ Deck and pad left clean; nothing of yours left behind	DATE _____
☐ Gate latched and locked; access left exactly as agreed	DATE _____
☐ Photograph of the water texted before you leave the drive	DATE _____
☐ Dated service tag left on the equipment pad	DATE _____
☐ Anything failing photographed, priced and sent the same week	DATE _____

Family Worksheet

Route density, equipment care, certifications and weather — the four things that decide whether the week runs you or you run it.

Route density: stops per day by zone, minutes between them, and the two stops wrecking a day:

Equipment maintenance: what gets serviced or replaced on a date rather than on failure, and when:

Certifications: what you will hold, by when, and what each one actually unlocks for you:

Weather contingency: rain days, storm recovery, freeze protocol, and how customers hear about it:

Equipment Log

What you paid, when you serviced it, when the reagents expire. Also the list your insurer will ask for after a break-in.

Your Warm 100 — 1 of 2

A hundred names, not fifty, written in one sitting. Family, old crews, church, the school gate, the parts counter. Ask who they know with a pool — never ask for the job itself.

#	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 small problem, solved completely and given away, which reveals the bigger one you get paid for. Include what she can do herself — that honesty is the whole mechanism.

ELEMENT	YOUR ANSWER
The narrow problem it solves	
Type (reveal / sample / one step)	
Delivery format	
Name (test three)	
Time to read it	
The next problem it reveals	
The offer that solves that one	
Where you hand it out	

LTGP : CAC Worksheet

What a route customer is worth against what one costs to win. Use last month's real spend and last month's real customers, not a good month you remember fondly.

LINE	AMOUNT	HOW YOU GOT IT
Monthly billing per stop		
Gross margin %		
Gross profit per stop per month		
Average months a customer stays		
Repair and seasonal profit per customer		
LTGP		
Marketing spend last 30 days		
Customers won last 30 days		
CAC		
LTGP : CAC		

Rule of 100 — Daily Tracker

One hundred of something every working day. Twelve weeks of ticks. The empty weeks will explain your quiet months better than any theory ever will.

MEASURE	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12
Warm reaches												
Doors and hangers near existing stops												
Cold calls and drop-ins												
Content minutes												
Ad spend placed												
Follow-ups sent												
Report visits booked												

WEEK NOTES

Estimate Visit Checklist

Twenty minutes in somebody's back yard. Run the same order every time, so the nervous visits go like the easy ones.

☐ Confirm the appointment the evening before, with an arrival window	DATE _____
☐ Arrive inside the window; message before she notices if anything changes	DATE _____
☐ Ask where to come in, whether the dog is in or out, and who is home during the day	DATE _____
☐ Latch the gate behind you before you do anything else	DATE _____
☐ Test the water on the deck, in front of her, and hand her the vial	DATE _____
☐ Read the equipment pad out loud — what is fine as clearly as what is not	DATE _____
☐ Photograph everything you intend to quote, before you quote it	DATE _____
☐ Ask the five questions and then stop talking	DATE _____
☐ Name anything that needs a licensed trade, and hand over two names you would use yourself	DATE _____
☐ Do one useful thing at no charge, without announcing it	DATE _____
☐ Offer the certificate of insurance before she asks for it	DATE _____
☐ Price it in writing, largest option first, guarantee and exclusions on the same page	DATE _____
☐ Propose one specific day — the day you already run her subdivision	DATE _____
☐ Leave the written quote in her hand before you leave the property	DATE _____

Objections and Replies — Pool Service

The first two columns are printed for you. The third is blank on purpose: write the reply in your own words, then say it out loud until it stops sounding like a script.

WHAT THEY SAY	WHAT IT REALLY MEANS	YOUR REPLY
The kid down the street does it for half that.	She is not comparing companies. She is telling you she has a cheap option that has already gone green on her once, and she wants to hear you defend the price without getting defensive about it.	
I can do this myself. I just need to buy the chemicals.	He can, and he knows it. What he is really asking is whether this work is skilled enough to be worth paying for, because he has already priced a bucket of tabs at the big-box store.	
I only need you in the summer.	In her head the pool stops existing in October. Nobody has ever told her what an unattended pool costs to bring back.	
Can you just come every other week?	He is trying to halve the price without having to say so out loud. He may also genuinely have a small, shaded, lightly-used pool where it would work.	
The last guy skipped weeks and I never knew whether he had been.	This is the real objection hiding behind most price objections in this trade. She was not overcharged. She was ghosted, and she is checking whether you are the same animal.	
Why do I pay the same in the months when nobody swims?	He thinks he is buying swims. He is buying a pool that never becomes a project.	
Give me a discount if I pay for the season up front.	He wants to feel like he negotiated something, and he is simultaneously telling you he has the cash and intends to stay.	
My old pool guy also built pools. Can you swap my heater while you are here?	He assumes servicing and building are one trade, because one man in one truck once showed up for both.	
You were here Tuesday and it is still cloudy.	He is not really accusing you. He is frightened that he has just bought the same disappointment twice.	
Send me a quote and I will let you know.	Either she has not yet decided the pool is a problem, or somebody else is coming Thursday and she does not want to say so to your face.	

The Access and Trust Conversation

She is handing a stranger a gate code for a yard she is not standing in. Decide how you earn that before you need to.

How access is agreed and recorded — code, key, lock box, and who else ever holds it:

What she can see that proves you were there: the photograph, the tag, the readings, the timing:

What you show her unprompted at the first visit — insurance, certification, the street you already service:

What happens if you have to send somebody else: how she is told, and how far in advance:

Your rule for children, dogs and unlocked gates, written so a helper could follow it exactly:

Review Request Script

At the gate, in person, in the second month, when the water has been right for weeks. Ask everyone. Offer nothing in exchange.

Your ask, word for word — short enough to say without reading it off anything:

When and how you send the link, and what you do if nothing happens:

Your reply to a bad review — remember you are writing to the next hundred readers, not to the reviewer:

Your weekly review count, and the day you sit down and check it:

First-Hire Scorecard

All of them true, with the evidence written beside them, or the answer is not yet. Not yet is a real answer and not a failure.

SIGNAL	YES / NO	EVIDENCE
A full day of stops exists, already sold		
That day is dense enough to run without long drives		
Turning away work in your zones weekly		
Cash covers eight weeks of wages and taxes		
A second vehicle or a shared plan exists		
A written job description exists		
Chemical handling training is written and signed off		
Route notes are good enough for a stranger to run		
A 90-day decision date is in the calendar		

Pay Plan Builder

A pay plan is a set of instructions. Write what each line rewards, then read the column back and ask what behaviour you just bought.

ELEMENT	AMOUNT OR RATE	WHAT IT REWARDS	WHAT IT MIGHT ACCIDENTALLY REWARD
Base day rate			
Overtime rule			
Per-stop element (if any)			
Retention bonus on his route			
Callback measure			
Repair or upsell share			
Fuel and vehicle			
Tools and protective equipment			
Certification paid for by you			
Review date and increase			

30 / 60 / 90 Ramp Plan

Written before the first interview. What he owns, what he touches, and what you inspect at each stage.

milestone	Day 30	Day 60	Day 90

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

Seats, not names. Write who answers the phone at each size — in this trade that seat decides more than any other.

At \$250k: who does what, and which single seat unlocks the most billable stops?

At \$500k: what has to be written down before a second route runs without you in it?

At \$1M: what are you doing all day, and who owns the route book?

The seat you would fill first if the money appeared tomorrow — and why that one:

Twelve-Month Forecast

The printed index is a reconstruction of this trade's seasonal shape, not measured data. Write your own opening and closing months beside it, then correct the whole page after one real season.

MONTH	DEMAND INDEX	STOPS BILLING	SEASONAL JOBS	REVENUE	COSTS	PROFIT
Jan	0.60					
Feb	0.73					
Mar	0.91					
Apr	1.14					
May	1.53					
Jun	1.60					
Jul	1.38					
Aug	1.06					
Sep	0.94					
Oct	0.78					
Nov	0.68					
Dec	0.65					
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

One line a week. Prepaid seasons are money you are holding that you have not earned — keep that column honest and it will keep you solvent.

Profit First Allocations

Money moves on two fixed dates a month, before anything is spent. Start with shares so small they feel symbolic, then raise them a point or two each quarter until it pinches.

ACCOUNT	TARGET SHARE	THIS MONTH	ACTUAL SHARE
Income (all deposits)			
Profit			
Owner pay			
Tax			
Winter account			
Operating expenses			
Parts pass-through			

KPI Scorecard — Pool Service

Targets published for pool service companies with dispatchers and several trucks. Compare yourself to your own last month, not to a company ten times your size.

MEASURE	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12
Average route stops per technician per day (target 15 count)												
Annual customer churn rate (target 30%)												
Average monthly recurring revenue per pool (target 157.5 USD)												
On-time payment collection rate (target 95%)												
Gross margin, maintenance route (target 57.5%)												
Chemical cost per route stop (target 8 USD)												
Technician drive-time share of route day (target 25%)												

WEEK NOTES

Monthly P&L

Route revenue and repair revenue on separate lines, always. Mixing them is the reason most people in this trade cannot say which half of the business actually pays.

MONTH	ROUTE REVENUE	REPAIR REVENUE	CHEMICALS + PARTS	LABOUR	OVERHEAD	NET

Days 1–30: Get Cash

One goal this month: a paying customer who is not related to you. Everything here exists to get you there faster.

☐ Entity registered; federal tax number obtained; business bank account open	DATE _____
☐ State board called; the service-versus-contracting line written inside the front cover	DATE _____
☐ General liability bound, with the chemical-exclusion answer in writing from your agent	DATE _____
☐ Commercial auto in place before the truck carries a single jug	DATE _____
☐ Chemical storage set up: separated, ventilated, locked, off the ground, in containment	DATE _____
☐ Refusal list written: licensed work, out-of-zone stops, unsigned customers	DATE _____
☐ Zones drawn on a paper map with a day of the week assigned to each	DATE _____
☐ Offer, guarantee and exclusions written on one page in one size of type	DATE _____
☐ Written prices for the monthly agreement and your five most common jobs	DATE _____
☐ Map profile claimed and completed with photographs of real water you cleared	DATE _____
☐ Warm hundred listed in one sitting; the first fifty contacted personally	DATE _____
☐ Report visit offer live, priced, and credited against the first month	DATE _____
☐ Daily tracker started, on today's date	DATE _____
☐ First paying job completed, photographed, paid and reviewed	DATE _____

Days 31–60: Get More Cash

More out of the customers you already have, not more customers. Both moves are cheap and both are in chapters you have read.

☐ Second fifty warm contacts made	DATE _____
☐ Something put in the hands of the six nearest houses to every stop you won	DATE _____
☐ Every finding photographed and priced the week it appeared	DATE _____
☐ Every customer on a signed agreement with a fixed service day printed on it	DATE _____
☐ Every customer moved onto automatic monthly payment	DATE _____
☐ Price raised one step for anybody new; the next ten quotes tracked and the yeses counted	DATE _____
☐ Job-start and job-close lists run on every stop, including the routine ones	DATE _____
☐ Review asked for in person on every stop that has gone well for a month	DATE _____
☐ First month's books reconciled; every receipt coded to route or repair	DATE _____
☐ Allocation transfers run on both dates, winter account included	DATE _____
☐ Break-even hourly calculated and posted where you quote from	DATE _____
☐ Three stops timed wheels-to-wheels, with the real minutes written over the estimate	DATE _____

Days 61–90: Get the Most Cash

Build the thing that makes month four easier than month one, then make the hire decision on evidence rather than exhaustion.

☐ Route book updated: stops at start, won, lost, stops at end, monthly billing	DATE _____
☐ Churn counted honestly, with the reason asked for on every departure	DATE _____
☐ Drive-time share measured across one full week	DATE _____
☐ The two stops wrecking a day identified, repriced or released	DATE _____
☐ Referral ask made on every completed repair and every good month	DATE _____
☐ Three property managers, association boards or realtors met inside your zones	DATE _____
☐ Lifetime gross profit and acquisition cost calculated from real figures	DATE _____
☐ Operator certification booked or completed	DATE _____
☐ First-hire scorecard completed honestly — including not yet, with a date on it	DATE _____
☐ Quarterly profit distribution taken, however small, so profit becomes real	DATE _____
☐ Next quarter’s one number chosen and written down	DATE _____
☐ Pre-mortem reviewed: which tripwires tripped, and what you did about each	DATE _____

Milestones and Tripwires

A milestone without a tripwire is a wish. Every tripwire has to be something you could actually notice on an ordinary Tuesday.

[illegible]

Decision Log

What you decided, why, and when you will look at it again. In a year this will be the most valuable page in the book.