

The Starving-Crowd Test for Your ZIP Codes

Three bars. Two out of three is a no. Answer for your actual service area, not for the country.

PAIN — List every multi-day outage in your target ZIP codes in the last three years. Where did you get the dates?

PURCHASING POWER — Owner-occupied homes, typical home value, and how many have wells, sump pumps or medical equipment.

TARGETABILITY — Name the three specific streets, subdivisions or feeders you can mail, drive or door-knock this month.

THE CALL — Which bar is weakest, and does that mean fix the marketing or move the radius? Write the decision.

Your Homeowner Avatar

One person, not a market. If you cannot picture their kitchen, you do not know them yet.

Who are they? Age, house, how long they have lived there, who else is in the house, what changed recently.

What are they afraid of, in their words? Write the sentence they would actually say out loud to a spouse.

What do they type into Google before they call anybody? List the exact phrases, not your version of them.

What have they already tried that did not work, and how do they feel about having tried it?

Personal Runway Worksheet

The real number that leaves your account every month, not the number you tell people. Total it, then divide your reachable savings by that total. That is your runway in months, and it decides how you are allowed to price for the next year.

Demand by Month — Standby Generator Installation

The demand index is pre-filled from five years of search behavior for this trade, normalized so the growth trend does not hide the shape. Anything above 1.00 is a busy month. Fill in the jobs and revenue you expect, then write what you will sell in the months that sit below the line.

MONTH	DEMAND INDEX	JOBS YOU EXPECT	REVENUE YOU EXPECT	WHAT YOU WILL DO IN THE SLOW MONTHS
Jan	0.84			
Feb	0.73			
Mar	0.84			
Apr	0.78			
May	0.90			
Jun	1.15			
Jul	1.33			
Aug	1.26			
Sep	1.27			
Oct	1.08			
Nov	0.88			
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 date attached. If you cannot hear her saying it, rewrite it.

The outcome in one sentence, the way the homeowner would say it to a spouse — not the way you would write it on an invoice.

The timeframe you can honestly hold, including permit and lead time. What is the slowest link in the chain?

The status change underneath the outcome — what does buying this let them stop being?

Which of the four levers is weakest in your current quote: outcome, certainty, speed, or effort? What would fix it?

Obstacle → Solution Map

Fifteen rows, four categories: what they do not know, what they cannot do, what is physically in the way, and what is in their head. Fill every row before you write a single component — an obstacle you skip becomes an objection you argue with later.

#	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 honestly. High value plus low cost to deliver stays in the core. High value plus high cost becomes an upgrade or a bonus. Low value gets cut no matter how much work it was to build. Aim for six to eight survivors.

[illegible]

Guarantee and Offer Name

Guarantee the fear, not the feeling. Then name the offer after the outcome, not after yourself.

What is the homeowner actually afraid of on the night the power goes out? Write the fear, not the objection.

Your guarantee, written so it costs you real money if you skip the load calculation or the gas capacity check.

What has to be true in your process for that guarantee to be safe to offer? List the steps you can never skip.

Three candidate names, outcome plus container. Circle the one a homeowner could repeat on the phone.

Service Area and Jobs You Will Not Do

Drive time, not miles. Then write your no list in pen, before a desperate month talks you out of it.

Your thirty-minute ring: name the towns, ZIP codes and rural loops inside it. Which have the outage history?

Your premium zone between thirty and forty-five minutes — what trip charge or minimum makes it worth the drive?

The jobs you refuse, and why. Be specific enough that you would still refuse them in a slow month.

Who you refer the refused work to. Name the plumber, gas fitter and larger contractor, with phone numbers.

Ten-Competitor Scan

Search your county's main phrase, open the first ten results, and fill one row each. The column that matters is the last one — read their one-star and three-star reviews and write down the gap those customers are describing.

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

Your One-Liner and Positioning Statement

Problem, plan, success. Say each draft out loud before you write the next one.

The problem, in the homeowner's language — the thing that goes wrong for people like them.

Your plan in three steps or fewer. If it takes more than three, it is not a plan, it is a process document.

The success — what life looks like after. Concrete and physical, not adjectives.

The whole thing as one sentence. Rewrite it four times below and circle the one your buddy would repeat.

Entity, EIN and Bank Setup

In this order, because each step asks for the one before it. Most of this is one weekend.

- | | |
|--|------------|
| ☐ Check the company name against your state's business registry, the domain, and Google for a similar name within a hundred miles | DATE _____ |
| ☐ File the LLC (or your chosen entity) with the Secretary of State and save the filed stamped copy | DATE _____ |
| ☐ Get the EIN free from the IRS website — never pay a third party for one | DATE _____ |
| ☐ Open a business checking account and a business debit or credit card in the company name | DATE _____ |
| ☐ Move every business dollar through those accounts only, starting the day they open | DATE _____ |
| ☐ Set up bookkeeping before the first invoice, not after the first tax season | DATE _____ |
| ☐ Ask your accountant whether an S election makes sense at your expected profit, and at what number it starts to | DATE _____ |
| ☐ Ask your accountant how sales tax applies to equipment you resell versus labor you perform in your state | DATE _____ |
| ☐ Register with your city or county for a local business license if one is required | DATE _____ |
| ☐ Claim the Google Business Profile the same week you name the company | DATE _____ |
| ☐ Set up a business phone number that is not your personal cell, and a voicemail greeting that says the company name | DATE _____ |
| ☐ Put the license number and the entity's legal name on every quote, invoice and vehicle | DATE _____ |

License Requirements by State — Standby Generator Installation

Ten states, pre-filled from published board sources, with the credential name, the board that issues it, whether an exam is required, and the fee range. This is a starting point and boards change fees — call the board for yours and write the answer in the margin with the date you called. Remember that the fuel-gas side of a generator install may sit under a different board than the electrical side in your state.

STATE	LICENSE REQUIRED?	LICENSE	BOARD	FEE	EXAM
Kentucky	Yes	Journeyman/Master Electrician License (the electrical hookup requires a licensed electrician; DHBC also registers electrical contractors)	KY Department of Housing, Buildings and Construction (DHBC), Electrical Division	\$100–\$125	Yes
Texas	Yes	Electrical Contractor License (business) plus a Master/Journeyman Electrician License held by the qualifying party	Texas Department of Licensing and Regulation (TDLR)	\$110	Yes
California	Yes	C-10 Electrical Contractor License	Contractors State License Board (CSLB)	\$450–\$650	Yes
Florida	Yes	Certified Electrical Contractor License	Florida DBPR / Electrical Contractors' Licensing Board (ECLB)	\$263–\$296	Yes
New York	No statewide	—	Check city / county	—	No
Pennsylvania	Yes	Home Improvement Contractor (HIC) Registration	PA Office of Attorney General	\$100	No
Illinois	No statewide	—	Check city / county	—	No
Ohio	Yes	OCILB Electrical Contractor License	Ohio Construction Industry Licensing Board (Ohio Dept. of Commerce)	\$175–\$238	Yes
Georgia	Yes	Electrical Contractor License (Class I unrestricted / Class II restricted)	Georgia State Board of Electrical Contractors (State Construction Industry Licensing Board, Secretary of State)	\$229–\$286	Yes
North Carolina	Yes	Electrical Contractor License (Limited / Intermediate / Unlimited)	NC State Board of Examiners of Electrical Contractors (NCBEEC)	\$100–\$200	Yes
Michigan	Yes	Electrical Contractor License	Michigan LARA / Electrical Administrative Board	\$55–\$300	Yes

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

Insurance Lines and Annual Cost Ranges

Four lines, with researched annual ranges for electrical contracting work. Workers compensation is quoted per hundred dollars of payroll rather than as a flat premium, so its number moves with what you pay people. Get at least three quotes on each line before you buy any of them.

COVERAGE	TYPICAL ANNUAL COST	WHAT IT COVERS	YOUR QUOTE
General liability	\$500–\$1,500	Damage or injury you cause to others	
Workers comp	2.63–6.9 per \$100 payroll	Your crew, hurt on the job	
Commercial auto	\$1,682–\$3,304	The truck and what it hits	
Bond	\$100–\$600	Not universally required for generator/electrical installers; depends on state license class. Where a bond applies (e.g., a \$25,000 CSLB C-10 contractor bond in CA, or FL's Certified Specialty Structure bond/letter-of-credit), annual premium typically runs 1-3% of the bond face amount.	
Tools & equipment		Theft from the truck or site	
Umbrella		Above the GL limit	

Insurance Quote Log

Three carriers minimum per line. Record limits and deductible, not just premium — the cheapest number on the page is often the one that pays the least when you need it.

[illegible]

Questions for Your Attorney and Accountant

Two hours, once, with a written list and your real quote in hand. Generic advice on a generic business is worth what it costs.

- | | |
|---|------------|
| ☐ Which entity fits how I actually operate, and what do I have to do every year to keep the liability separation real? | DATE _____ |
| ☐ What has to be in my written agreement in this state, and will you review the one I use rather than me copying one? | DATE _____ |
| ☐ How must change orders be documented here for the added work to be collectible? | DATE _____ |
| ☐ What are the rules on deposits in this state — how much may I take, and when does the clock start on delivering? | DATE _____ |
| ☐ What are my mechanics lien deadlines, and what notice do I have to serve before I lose the right? | DATE _____ |
| ☐ Do I need a separate license or a licensed subcontractor for the fuel-gas portion of a generator install? | DATE _____ |
| ☐ How does sales tax apply to equipment I resell versus labor I perform, and who has to collect it? | DATE _____ |
| ☐ At what profit level does an S election start saving me more than it costs to maintain? | DATE _____ |
| ☐ What records do I have to keep, for how long, and in what form if I am audited? | DATE _____ |
| ☐ What is the correct test in this state for a helper being a subcontractor rather than an employee? | DATE _____ |
| ☐ What do I owe a customer if I have to cancel or reschedule, and what may I charge if they do? | DATE _____ |
| ☐ What should I do in the first hour if a customer alleges my work caused a fire or a gas leak? | DATE _____ |

Equipment Budget — Standby Generator Installation

Pre-filled with researched price ranges for this trade, essential items marked. Write your actual quoted price in the last column, then total the essentials. If your total is far under the range, you probably forgot the fuel side.

ITEM	LOW	HIGH	DAY ONE?	YOUR PRICE	BOUGHT
CAT III/IV rated digital multimeter	\$50	\$400	Yes		
Non-contact voltage tester / voltage-rated tool set	\$100	\$300	Yes		
Digital clamp meter	\$100	\$500	Yes		
Hand conduit bender (EMT)	\$40	\$150	Yes		
Cordless drill/impact driver set	\$400	\$1,000	Yes		
Motorized power fish tape system (wire pulling)	\$300	\$800	Yes		
PPE kit: insulated gloves, safety glasses, hard hat, arc-flash face shield	\$115	\$430	Yes		
Lockout/tagout kit	\$25	\$75	Yes		
Hole saw kit (panel and wall penetrations)	\$50	\$150	Yes		
800 lb. capacity appliance hand truck (moving generator units)	\$79	\$199	Yes		
Combustible gas leak detector (natural gas/propane)	\$32	\$141	Yes		
Manual ratchet pipe threader kit (black iron gas line)	\$40	\$60	Yes		
Circuit breaker finder	\$40	\$150	Later		
Cable tracer	\$100	\$500	Later		
Thermal imaging camera (load/connection diagnostics)	\$200	\$2,000	Later		
Megohmmeter (insulation resistance tester)	\$300	\$1,500	Later		
Laser level (concrete pad leveling)	\$50	\$300	Later		
Essential equipment	\$1,331	\$4,205			

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

Total Startup Budget

Essential equipment plus vehicle, first-year general liability, and launch marketing. Add your own lines for anything this book cannot know — a distributor account deposit, a dealer program fee, a county business license. Then add a reserve line and fill it in honestly.

LINE	LOW	HIGH	YOUR NUMBER
Essential equipment (previous page)	\$1,331	\$4,205	
Used cargo van or 3/4-ton pickup (5-10 years old)	\$10,000	\$20,000	
General liability, year one	\$500	\$1,500	
Launch marketing	\$500	\$3,000	
Licenses and permits			
Software and phone, 3 months			
Personal runway (chapter 1)			
Reserve (10% of the total)			
Total startup	\$12,331	\$28,705	

Funding Sources

Rank every source by what it actually costs you, not by how fast it arrives. Fill this in on a calm day so the desperate day already has an answer written down.

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

Client-Financed Acquisition Plan

How the deposit on job one funds the marketing that finds job two. Write the percentage before you have the money.

Your draw schedule: what is collected at signing, at delivery, and at final inspection? Write the trigger for each.

Where does the deposit sit until the equipment is ordered, and what rule keeps you from spending it?

What fixed share of the profit from every closed job goes straight into marketing? Write the number and the day of the month.

What is the smallest reserve that lets you say yes to a job before you have been paid? How will you build it?

Typical Jobs and Price Ranges — Standby Generator Installation

Researched national ranges by job type, with typical hours. Write your own price in the last column and check it against your break-even hourly rate on the next sheet. Where your number is far below the range, find out why before you assume you are efficient.

TYPICAL JOB	LOW	HIGH	HOURS	PER HOUR (HIGH ÷ HOURS)	YOUR PRICE
Whole-house standby generator installation (unit + ATS + pad + gas hookup)	\$8,000	\$16,000	12	\$1,333	
Annual maintenance/inspection visit	\$200	\$600	2	\$300	
Portable-generator interlock kit installation	\$200	\$500	2	\$250	
Automatic or manual transfer switch installation	\$400	\$2,500	4	\$625	
Gas line run/extension for generator hookup (typical 20 ft)	\$240	\$500	3	\$167	
Concrete pad pour for generator	\$150	\$400	2	\$200	

Crews in this trade bill \$50—\$100 an hour (flat pricing). Technicians earn \$21—\$52 an hour.

Good / Better / Best Builder

Three columns, filled left to right, presented right to left. Build the top option first and make it real — you must be willing to actually sell it. What is left out of each tier matters more than what is in it.

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

Break-Even Hourly Rate

Everything the business owes every month whether or not the phone rings. Be honest about billable hours — quoting, driving, ordering and permit chasing are not billable, and they are most of your week.

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 a row for each markup you actually use and convert it to the margin it produces. Keep the finished sheet in the truck. The gap between the two numbers is the most expensive misunderstanding in the trades.

JOB COST	MARKUP %	PRICE	MARGIN %

Your Attraction Offer

The first step that reveals the real problem. It must be worth her time even if she buys nothing.

Name your attraction offer and describe exactly what you do during it, step by step, in under an hour.

What does she walk away holding? Describe the physical thing you leave behind.

What problem does it usually reveal, and what offer solves that problem?

What does it cost you in time and materials, and what is your rule for when you will not do one?

Upsell and Downsell Plan

Upsell only what the solved problem created. Downsell by changing how they pay or what they get — never the price of the same thing.

List every upsell that becomes obvious once the main job is sold, and the moment in the visit when you raise it.

Your payment-terms downsell: what draws, what financing, and who is the lender you have actually checked out?

Your scope downsell: what smaller build gives them most of the outcome, and what do they give up?

What will you never discount, and what will you say when somebody asks you to?

Continuity or Referral Plan

Your maintenance agreement, line by line, plus the referral play that runs alongside it. Fill in a target take-rate for each row so you can tell later whether it worked.

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

Job-Start Checklist

Same every time. Most of a bad review is decided in the first thirty minutes on site.

- | | |
|--|------------|
| ☐ Confirm with the homeowner the day before, with the arrival window in writing | DATE _____ |
| ☐ Permit in hand and posted where the inspector expects to find it | DATE _____ |
| ☐ Unit, transfer switch, pad materials and fuel-line materials all on site and counted | DATE _____ |
| ☐ Walk the route the equipment will travel and protect it — gravel, grass, gate, siding | DATE _____ |
| ☐ Photograph pre-existing conditions on every surface you will work near or over | DATE _____ |
| ☐ Confirm the pad location against the manufacturer setbacks and the approved plan, in front of the homeowner | DATE _____ |
| ☐ Locate and mark utilities before any digging, and document the ticket | DATE _____ |
| ☐ Confirm gas shutoff and main-breaker locations, and tell the homeowner what will be off and for how long | DATE _____ |
| ☐ Lockout/tagout applied before any panel work begins | DATE _____ |
| ☐ PPE on: insulated gloves, glasses, arc-flash shield for anything live | DATE _____ |
| ☐ Tell the homeowner what today looks like, what she will hear, and when you will be back tomorrow | DATE _____ |
| ☐ Fire extinguisher on site and reachable before any threading, grinding or torch work | DATE _____ |

Job-Close Checklist

Proof, cleanup and the ask. Skipping the last two items is how a perfect install produces no second job.

☐ Start-up and load test completed, with the transfer watched and timed	DATE _____
☐ Gas connections leak-tested with the detector and the result written down	DATE _____
☐ Torque and terminations checked at the transfer switch and the panel	DATE _____
☐ Exercise cycle set to a day and time the homeowner picked, not the factory default	DATE _____
☐ Site cleaned past your own standard — pipe shavings, concrete splatter, packaging, gravel	DATE _____
☐ Photos of every penetration, connection and label, uploaded before you leave the driveway	DATE _____
☐ Walkthrough recorded on the homeowner's phone: what the lights mean, what to check, who to call	DATE _____
☐ Owner card mounted on or inside the panel door	DATE _____
☐ Manufacturer warranty registered and the confirmation forwarded to the homeowner	DATE _____
☐ Final inspection scheduled or completed, and the result sent to the homeowner in writing	DATE _____
☐ Maintenance plan offered, with the first service date on the calendar	DATE _____
☐ Review requested by name, in person, before you drive away	DATE _____

Family Worksheet

Your license path, your qualifier arrangement, and the permit and inspection reality in your county.

Where are you on the ladder today, how many documented hours do you have, and what is the next exam and its date?

Who qualifies your business, what does that arrangement cost, and what is written down about it?

Who handles the fuel-gas side in your state — you, a second license, or a named subcontractor? Write the name and number.

Your permit process by county: who files, what it costs, how long it takes, and which inspector fails what most often.

Equipment Log

Every tool, what it cost, and when it is due for service or calibration. Your accountant wants this and so does your future self on a Saturday morning.

Your Warm 100 — 1 of 2

Scroll your contacts A to Z and write down everyone you would say hello to in a parking lot. One name per line. Mark the date you contacted them and what came back, then work the whole list 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

Narrow problem, real value, and a next problem it reveals. Test three names on actual homeowners before you print anything.

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

Both halves or neither. Count the maintenance renewals in lifetime gross profit — leaving them out is how installers convince themselves that advertising does not work.

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 hundred a day, every working day, for one hundred days before you form an opinion. Mark the box even on the days nothing comes back — especially then.

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

Same order every time. The first fifteen minutes are questions, not answers.

☐ Confirm the appointment the morning of, with your name and arrival window	DATE _____
☐ Park on the street, not the driveway; walk the outside before you knock	DATE _____
☐ Ask about the last outage first — what happened, how long, who was home	DATE _____
☐ Ask whether anyone in the house depends on power for a medical device	DATE _____
☐ Walk the panel with the homeowner and write down every must-stay-alive circuit together	DATE _____
☐ Check gas meter capacity against the load before you name any number	DATE _____
☐ Photograph the panel, the meter, the proposed pad location and every setback	DATE _____
☐ Name the surprise if you found one, and price it as a conditional line	DATE _____
☐ Present the top option first, then the middle, then the honest smaller build	DATE _____
☐ Say out loud which one you would pick if it were your mother's house, and why	DATE _____
☐ Propose the next step as two forward doors, not an open question	DATE _____
☐ Leave the load sheet behind whether or not they buy, and state how long the price holds	DATE _____

Objections and Replies — Standby Generator Installation

Pre-filled with what this trade actually hears and what each one usually means underneath. Write your own reply in the last column, in your own words — a script you cannot say naturally is worse than no script.

WHAT THEY SAY	WHAT IT REALLY MEANS	YOUR REPLY
That is a lot of money for something that might never run.	They have not converted the price into a risk they can feel. Insurance framing has not happened yet.	
My cousin says he can do it cheaper.	They are not sure what the price includes, so the only thing they can compare is the number itself.	
I already have a portable. I just drag it out.	They have a working-enough solution and have not felt the failure mode yet.	
Can you knock something off if I pay cash?	They want to feel like they negotiated. Often it is about dignity, not the discount.	
I want to think about it and talk to my spouse.	Either a real decision-maker is missing, or something in the visit did not land and they are being polite.	
Why do I need a permit? Nobody permits anything around here.	They are worried about cost, delay, and the tax assessor, in that order.	
How long until it is installed? I need it before the storm.	They are buying under pressure, and pressure buyers churn when the date slips.	
Do I really need the maintenance plan, or is that just an add-on?	They suspect it is a subscription for nothing, which is exactly what a bad one is.	
Can it just run everything in the house?	They do not know that whole-house and managed-load are different products at different prices.	

Review Request Script

Asked out loud, on site, in the ninety seconds after the transfer test. Not a text next week.

Your ask, word for word. Say it out loud before you write it — if it sounds rehearsed, cut it in half.

The sentence you hand them so they know what to write about. Aim it at the worry they had at the start.

What you do the moment they agree — QR code, link, phone in hand? Make it take under a minute.

Your follow-up rule for the ones who meant to and did not: when, how, and how many times before you stop.

First-Hire Scorecard

Three or more yeses means hire. Two or fewer means you have a scheduling or pricing problem, not a staffing one. Fill this in on a calm week so the busy week already has an answer.

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		

30 / 60 / 90 Ramp Plan

Write it before they start, not after they struggle. The day-90 row is a real decision, not a formality — put the date on your calendar now.

[illegible]

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

Draw all three now. Growing into a shape you already sketched is far easier than inventing one mid-storm-season.

At the first level: who does what, and what is the single bottleneck holding the company there?

At the second level: what is the first seat you fill, and what comes off your plate the day they start?

At the third level: which two seats must exist, and what written standards keep quality consistent across crews?

Which of your current jobs would you hand over first, and what has to be written down before you can?

Twelve-Month Forecast

The demand index is pre-filled from this trade's own seasonality. Estimate your year, push each month up or down by its index, then fill in jobs, average ticket, costs and profit. The thin months are the ones to plan for, not the busy ones.

MONTH	DEMAND INDEX	JOBS	AVG TICKET	REVENUE	COSTS	PROFIT
Jan	0.84					
Feb	0.73					
Mar	0.84					
Apr	0.78					
May	0.90					
Jun	1.15					
Jul	1.33					
Aug	1.26					
Sep	1.27					
Oct	1.08					
Nov	0.88					
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

Weekly, in pen. The deposits-held column is the one that saves companies — that money is a promise with a unit attached, not a balance.

Profit First Allocations

Five accounts, two allocation days a month, same dates every time. Start small — a profit share you can actually sustain beats a heroic one you abandon in March.

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

KPI Scorecard — Standby Generator Installation

Pre-filled with researched benchmarks for this trade, each with its source. Fill in your own number weekly. A benchmark you are far below is a question, not a verdict — go find out why before you change anything.

MEASURE	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12
Generator sales leads as % of total electrical leads (target 15%)												
Net profit margin (target 15%)												
Gross profit margin (target 66%)												
Average whole-house install ticket (target 12,000 USD)												
Lead-to-book conversion rate (target 7.8%)												
Product margin on a Generac dealer sale (target 10%)												
Business sale valuation multiple (target 4 x SDE)												

WEEK NOTES

Monthly P&L

Fourteen months so you can see this year against last. Materials and subs are the line that moves most; if gross profit is drifting down while revenue climbs, the problem is pricing, not volume.

MONTH	REVENUE	MATERIALS + SUBS	LABOR	OVERHEAD	NET PROFIT

Days 1–30: Get Cash

One measure of success in this block: money from a paying customer. Everything here serves that.

☐ Entity filed and EIN in hand	DATE _____
☐ Business bank account and card open, personal money separated from day one	DATE _____
☐ General liability bound; workers compensation if you have anyone on payroll	DATE _____
☐ License question answered for your state, in writing, with the board's phone number saved	DATE _____
☐ Company named, domain checked, Google Business Profile claimed with real photos	DATE _____
☐ Distributor account opened and terms asked for out loud	DATE _____
☐ One-page price sheet built from the chapter 6 worksheets, printed, in the truck	DATE _____
☐ Attraction offer named, written, and describable in one sentence	DATE _____
☐ Warm hundred written out — every name, one at a time	DATE _____
☐ All hundred contacted individually by day 14 and logged	DATE _____
☐ First estimate visit run off the chapter 10 checklist	DATE _____
☐ First job sold, deposit collected, equipment ordered the same day	DATE _____

Days 31–60: Get More Cash

More from the customers who already said yes. Cheaper than finding new ones, and faster.

☐ Upsells printed on the quote itself with prices and a checkbox, not mentioned verbally	DATE _____
☐ Price raised one real step on the next quote written	DATE _____
☐ Yes-rate tracked across the five quotes after the raise	DATE _____
☐ Maintenance plan offered at every single closeout, no exceptions	DATE _____
☐ Review requested on site, in person, on every completed job	DATE _____
☐ Job-start and job-close checklists actually used and marked, not just printed	DATE _____
☐ The single worst thing that went wrong on job one written into a checklist so it cannot repeat	DATE _____
☐ Two houses either side of every completed install knocked on and given a card	DATE _____
☐ Warm hundred worked a second time for the ones who did not respond	DATE _____
☐ First install documented on video and posted where your county looks	DATE _____
☐ Every job costed: revenue, materials, labor, hours — gross margin calculated per job	DATE _____
☐ Profit First accounts open and the first two allocation days actually executed	DATE _____

Days 61–90: Get the Most Cash

Build the parts that keep paying after you stop working. Then make the hire decision on evidence, not on mood.

☐ Maintenance list built with service dates and a renewal notice scheduled ahead of each one	DATE
☐ Referral ask scripted and used at every closeout and every annual service	DATE
☐ Trade referral relationships started — plumber, HVAC tech, well driller, property manager, by name	DATE
☐ Content cadence set and kept for four straight weeks, not a burst	DATE
☐ Twelve-month forecast built with the seasonality index and the thin months identified	DATE
☐ Reserve account opened and funded from every month above the line	DATE
☐ First-hire scorecard scored honestly; decision made and dated either way	DATE
☐ Job description written for the first hire, whether or not you hire this quarter	DATE
☐ Prices reviewed again against the jobs sheet and raised if the yes rate says so	DATE
☐ Every open quote followed up at least three times before it is called dead	DATE
☐ Pre-mortem written, with a tripwire and a pre-decided action for each failure mode	DATE
☐ Next ninety days planned on paper before this one ends	DATE

Milestones and Tripwires

A milestone without a tripwire is a wish. For each row write the early signal that tells you it is going wrong, while there is still time to change something.

[illegible]

Decision Log

Every decision that costs money or changes direction, with the reason and a date to revisit it. In a year this log will be the most valuable page in the book — it is the only honest record of what you were actually thinking.