The Starving-Crowd Test for Your ZIP Codes

Do this for the three ZIP codes you would actually drive to on a Tuesday. Run it again per town if you are torn between two markets.

PAIN — what is failing in these houses, and what makes it worse each season? Name the housing stock and the decade it went up.

PURCHASING POWER — median home value, median owner tenure, and what a whole-house job costs against it.

TARGETABILITY — three ways you can reach these owners this week without buying a lead.

VERDICT — all three yes, or which one is missing and what would have to change first?

Your Homeowner Avatar

Write about one real person you could name, not a demographic. If you cannot picture the driveway, you do not have the avatar yet.

What broke, and what did they already try before they called anybody?

What are they actually afraid of — the price, the mess, the hole in the wall, or being talked down to?

What words do they type into their phone at eleven at night?

Who else have they let quote it, and what did they think of him?

What would make them pick you over the company with the radio ad?

Personal Runway Worksheet

Every dollar your household spends in a month, and where it comes from if no deposit lands. Include the truck payment you were going to leave off.

MONTHLY PERSONAL EXPENSE	AMOUNT	COVERED BY (SAVINGS / SPOUSE / SIDE INCOME)

Demand by Month — Window and Door Installation

National demand for this trade by month. Nobody wants a hole in the wall in December, and the index shows it. Pencil your own numbers beside it after your first full year.

MONTH	DEMAND INDEX	JOBS YOU EXPECT	REVENUE YOU EXPECT	WHAT YOU WILL DO IN THE SLOW MONTHS
Jan	0.80			
Feb	0.84			
Mar	0.97			
Apr	1.10			
May	1.07			
Jun	1.14			
Jul	1.13			
Aug	1.18			
Sep	1.07			
Oct	1.00			
Nov	0.91			
Dec	0.79			
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

Write it in her words, with a date attached. If a sentence contains the word argon, start over.

The result she wants, said the way she would say it to a friend on the phone.

The timeframe you can honestly hold from deposit to done, including the order lead time.

What she can stop worrying about the day the job is finished.

Proof you can show today that this outcome is likely — photos, addresses, references, a warranty.

Obstacle → Solution Map

Fifteen reasons this homeowner does not buy, sorted into the four buckets, each one reversed into something your offer includes.

#	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

Name every component. Score what it is worth to her against what it costs you. Keep, bonus, or cut — no sentimental exceptions.

COMPONENT	PROBLEM IT SOLVES	VALUE TO THEM	COST TO YOU	KEEP / BONUS / CUT

Guarantee and Offer Name

Specific, bounded, inside your control. Nothing about her power bill, her thermostat or her attic.

What exactly do you promise, and for how long?

What happens if you cannot fix it — the remedy, in one sentence she can repeat.

What the guarantee does not cover, said plainly and without weasel words.

Three names for the package. Circle the one that says the outcome instead of the product.

The one sentence you will say on every estimate to introduce it.

Service Area and Jobs You Will Not Do

Drive times, not miles. Then the list of jobs you turn down and the sentence you use to turn them down.

Your tight radius for single openings and service calls — towns, ZIPs, and the drive time that bounds it.

Your wider radius, and the minimum ticket that earns the drive out to it.

Five job types you will not take, and why each one loses money or risk you cannot carry.

The exact sentence you say on the phone when one of those five calls you.

The one neighborhood you intend to own by name, and how you will know when you own it.

Ten-Competitor Scan

Top ten on the map inside your circle. Read their one-star reviews, not their five-star ones. The gap column is the whole point of the page.

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

Your One-Liner and Positioning Statement

Problem, plan, result. Three parts, one breath, no certifications and no company history.

The problem your customer has, in her language.

Your plan in three steps she could repeat to her husband.

The result she gets, with a timeframe attached.

The whole thing as one sentence, said out loud until it stops sounding rehearsed.

Where this sentence goes this week: profile, sign, voicemail, shirt, text signature.

Entity, EIN and Bank Setup

One morning of forms. Tick them in this order and you will not have to redo any of it.

- [ ] Entity chosen and discussed with an accountant, not just picked off a website — DATE
- [ ] Entity filed with the Secretary of State, using an address you will still have in two years — DATE
- [ ] EIN obtained from the IRS — DATE
- [ ] Business checking account open, with the entity name on it — DATE
- [ ] Second savings account open for sales tax and the profit allocation — DATE
- [ ] Business card or fuel card in the business name, personal card retired from job spending — DATE
- [ ] Sales tax registration and resale certificate handled, if your state taxes what you resell — DATE
- [ ] Bookkeeping set up, even if it is one spreadsheet and a receipt folder — DATE
- [ ] Supplier dealer account application submitted with EIN, entity docs and certificate of insurance — DATE
- [ ] Business phone number that is not your personal cell, forwarding to your cell for now — DATE
- [ ] Business profile claimed on the map with real photos of your own work — DATE
- [ ] Domain and email in the business name, so estimates do not arrive from a free address — DATE

License Requirements by State — Window and Door Installation

The states people ask about most. Confirm every line with the board before you spend a dollar, and remember that no statewide license almost never means no license — it means the city or county is the one to call.

STATE	LICENSE REQUIRED?	LICENSE	BOARD	FEE	EXAM
Kentucky	No statewide	—	Check city / county	—	No
Texas	No statewide	—	Check city / county	—	No
California	Yes	C-17 Glazing Contractor	Contractors State License Board (CSLB)	$200–$350	Yes
Florida	Yes	Certified Window and Door Installation Specialty Contractor	Florida DBPR / Construction Industry Licensing Board	$145–$245	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	No statewide	—	Check city / county	—	No
Georgia	Yes	Residential-Basic Contractor	GA State Licensing Board for Residential and General Contractors (Secretary of State)	$100–$525	Yes
North Carolina	No statewide	—	Check city / county	—	No
Michigan	Yes	Maintenance & Alteration Contractor (Replacement Windows/Doors/Garage Doors)	Michigan LARA / Residential Builders' and M&A Contractors' Board	$195–$265	Yes

Federal: EPA Lead-Safe Certification (RRP) — Firm Certification (Renovation, repair or painting that disturbs painted surfaces in pre-1978 housing or child-occupied facilities — covers window and door replacement). Rules change — confirm with the board before you spend a dollar.

Insurance Lines and Annual Cost Ranges

What each line covers and roughly what it costs. Bring this page to the agent and make him talk about the empty rows too.

COVERAGE	TYPICAL ANNUAL COST	WHAT IT COVERS	YOUR QUOTE
General liability	$1,000–$1,148	Damage or injury you cause to others	
Workers comp	6.13–26.65 per $100 payroll	Your crew, hurt on the job	
Commercial auto	$2,121–$3,576	The truck and what it hits	
Bond	$200–$1,250	Bond requirements vary by state license (e.g. California CSLB requires a $25,000 contractor bond as part of C-17 licensing); this range is the typical annual premium a starter pays for a state-required surety bond, not the bond's face value.	
Tools & equipment		Theft from the truck or site	
Umbrella		Above the GL limit	

Insurance Quote Log

Three agents minimum. Ask each one what is excluded, and ask about glass breakage and water intrusion by name.

CARRIER / AGENT	LINE	LIMITS	ANNUAL PREMIUM	DEDUCTIBLE	DECISION

Questions for Your Attorney and Accountant

One hour with each. Take this page. Do not download paperwork off the internet and hope it fits your state.

- [ ] Is an LLC right for me here, and how should it be taxed given what I expect to clear? DATE ____
- [ ] What does my customer paperwork need to say about deposits, change orders and cancellation in this state? DATE ____
- [ ] How should a change order be documented so it is enforceable when I find rot behind the trim? DATE ____
- [ ] Do I charge sales tax on materials, on labor, or on both, and what does the resale certificate change? DATE ____
- [ ] What is the correct way to pay a helper here — subcontractor or employee — and what test decides it? DATE ____
- [ ] What does my state require me to disclose in writing before I take a deposit? DATE ____
- [ ] What lien rights do I have if a homeowner refuses the final payment, and what deadline starts when? DATE ____
- [ ] What should my written labor warranty actually say, and what should it exclude? DATE ____
- [ ] How do I keep the entity from being pierced — what do I have to stop doing personally? DATE ____
- [ ] What records do I need to keep for lead-safe work, and for how long? DATE ____
- [ ] What happens to the business if I am hurt and cannot work for three months? DATE ____
- [ ] What should I be putting aside every month for quarterly taxes at my expected revenue? DATE ____

Equipment Budget — Window and Door Installation

Check off what you already own before you buy anything. Day-one items are marked Yes; the rest come out of job money later.

ITEM	LOW	HIGH	DAY ONE?	YOUR PRICE	BOUGHT
Low-expansion window & door spray foam sealant (case)	$6	$21	Yes		
Composite shims (bundle to contractor bulk box)	$2	$90	Yes		
Flat pry bar / wrecking bar set	$13	$109	Yes		
Cordless drill/driver	$62	$389	Yes		
Cordless reciprocating saw	$89	$390	Yes		
7-1/4 in. circular saw	$79	$499	Yes		
Manual caulking gun	$6	$25	Yes		
48 in. box-beam level	$22	$72	Yes		
25 ft. tape measure	$7	$39	Yes		
Folding utility knife	$14	$27	Yes		
32 ft. fiberglass extension ladder	$529	$800	Yes		
Safety glasses & gloves kit	$8	$45	Yes		
Glass/tile vacuum suction-cup lifter	$24	$179	Later		
Door lock & deadbolt installation hole-saw kit	$9	$50	Later		
Cordless impact driver	$59	$199	Later		
Essential equipment	**$837**	**$2,506**			

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

Total Startup Budget

The four buckets: tools, vehicle, paperwork, marketing and reserve. Fill the right column with your number, not the book's.

LINE	LOW	HIGH	YOUR NUMBER
Essential equipment (previous page)	$837	$2,506	
Used compact cargo van (2019 Ford Transit Connect Cargo XLT, ~6-7 years old)	$9,645	$11,920	
General liability, year one	$1,000	$1,148	
Launch marketing	$20,000	$53,000	
Licenses and permits			
Software and phone, 3 months			
Personal runway (chapter 1)			
Reserve (10% of the total)			
Total startup	**$31,482**	**$68,574**	

Funding Sources

Rank them by cost and by risk — two different columns. A supplier trade account belongs near the top of this page.

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

Client-Financed Acquisition Plan

How the deposit on job one pays for the marketing that finds job two. Write the actual dollars and the actual dates.

Your deposit percentage, and the sentence you say to explain what it covers.

Cash you collect in the first thirty days of one average job, start to finish.

What it costs you to find and deliver that one customer, all in.

The fixed share of each job's profit that goes straight back into marketing.

Where deposit money sits between signing and ordering, and who is allowed to touch it.

Typical Jobs and Price Ranges — Window and Door Installation

Published ranges for the jobs this trade actually sells. The last column is yours — fill it in after you have run the break-even page.

TYPICAL JOB	LOW	HIGH	HOURS	PER HOUR (HIGH ÷ HOURS)	YOUR PRICE
Single window replacement (installed)	$300	$2,100	1.5	$1,400	
Whole-house window replacement (10-15 windows)	$4,000	$10,500	16	$656	
Exterior door installation (pre-hung with frame)	$546	$2,375	4	$594	
Interior door installation	$362	$1,235	2	$618	
Sliding glass/patio door replacement	$1,169	$4,146	6	$691	

Crews in this trade bill $60—$125 an hour (quoted per window or door installed). Technicians earn $21—$32 an hour.

Good / Better / Best Builder

Build all three, present the expensive one first, and circle the middle. Good means less scope, never a lower standard.

	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 in a month, divided by the hours a customer actually pays for. Not the hours you work.

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

Do this once by hand and you will never mix them up again. Adding a third to cost does not make you a third.

JOB COST	MARKUP %	PRICE	MARGIN %

Your Attraction Offer

A diagnosis, not a free estimate. Something short and useful that ends with a problem only you can solve.

What you inspect, in order, and how long it honestly takes.

What she walks away holding, whether she hires you or not.

The problem it almost always reveals, and the offer that solves it.

What you name it, and the one sentence that gets you the appointment.

Upsell and Downsell Plan

Offer the next thing when the problem is visible. Downsell by changing what they get or how they pay — never the price of the same scope.

The three upsells you can offer while you are already on the job, in order of size.

The exact moment on the job when each one gets mentioned.

Your payment-terms downsell: what you can offer without becoming a bank.

Your scope downsell: the smaller job you would happily do, and what stays out.

Continuity or Referral Plan

This trade has no subscription. Do not invent one. Build the check-up visit, the warranty registration and the referral ask instead.

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

Job-Start Checklist

Before the first pry bar comes out of the van. Most bad reviews are surprises, not workmanship.

- [ ] Units on site, every crate opened and every unit inspected for damage — DATE ______
- [ ] Order matched against the signed measurement sheet, opening by opening — DATE ______
- [ ] Existing damage photographed — walls, siding, floors, landscaping, driveway — DATE ______
- [ ] Homeowner briefed: parking, first room, loud hours, finish time, one hole open at a time — DATE ______
- [ ] Drop cloths down inside and out before anything is opened — DATE ______
- [ ] Ladder set at four to one, extended above the landing, footed or tied off — DATE ______
- [ ] Eye protection and cut-resistant gloves on before the first tear-out — DATE ______
- [ ] Weather checked; nothing opens after early afternoon if the sky turns — DATE ______
- [ ] Lead-safe containment set up if the house predates the paint rules — DATE ______
- [ ] Pets and children accounted for and doors kept controlled — DATE ______
- [ ] Debris and disposal plan set — nothing gets piled beside the garage — DATE ______
- [ ] Change-order pad in your pocket before you find the first soft sill — DATE ______

Job-Close Checklist

The last twenty minutes decide the review. Walk it with her, in the room, before you pack the van.

- [ ] Every unit opened, closed and locked in front of the homeowner — DATE
- [ ] Tilt, sweep, threshold and roller operation demonstrated and adjusted — DATE
- [ ] Interior and exterior trim finished and caulked, joints tooled — DATE
- [ ] All flashing and foam photographed before trim went back on, filed with the job — DATE
- [ ] Old units, glass and packaging on the truck — not in a pile — DATE
- [ ] Interior vacuumed in every room worked in — DATE
- [ ] Magnet run down the driveway and along the drip line — DATE
- [ ] Manufacturer warranty registered in the homeowner's name, confirmation sent to her — DATE
- [ ] Written labor warranty handed over and explained in plain words — DATE
- [ ] Punch list written in front of her, even when it is empty, with dates — DATE
- [ ] Review asked for on site, while you are both standing in the finished room — DATE
- [ ] Final payment collected before the van moves — DATE

Measure and Order Sheet — Window and Door Installation

Nothing gets ordered off audit numbers. Measure, have a second person check it, and get the homeowner to sign this page before the order goes in.

OPENING / ROOM	WIDTH	HEIGHT	TYPE & HANDING	GLASS / GRID	FULL-FRAME OR INSERT	CHECKED BY

Family Worksheet

Ladders, weather and the clean-up standard. Write your rules down now, before the day you are tired and behind.

Your ladder rules, in your own words, including who is allowed to set it and who checks it.

Your weather rule: the latest hour you will open an opening, and what closes a hole in a hurry.

Your rain-day policy: the morning call time, the reschedule window, and when you tell the customer.

Your clean-up standard, item by item, in the order you do it.

What you will do in the slow months so the calendar is not empty and neither is the account.

Equipment Log

Two minutes a month. What you bought, what it cost, when it is next due for a look, and the day the ladder gets retired.

ITEM	BOUGHT	COST	SERVICE DUE	SERVICED	NOTES

Your Warm 100 — 1 of 2

Write all the names first, then send one at a time, personally. Lead with the audit, not the sale, and ask every one of them who else they know.

#	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 a small problem that reveals the bigger one. Good enough to charge for, done in under ten minutes.

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

Gross profit over the whole relationship, divided by what it cost to get her. Under three to one and you cannot afford your own marketing.

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 channel, every working day, twelve weeks. Fill it in with a pen so the empty boxes stay visible.

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												
Audits booked												

WEEK NOTES

Estimate Visit Checklist

Forty minutes. Ask more than you talk, remove the four fears before she raises them, and leave with a date rather than a maybe.

- [ ] Arrive on time or text before you are late — not after — DATE
- [ ] Park where you will actually park on install day and say so — DATE
- [ ] Boots off or covers on, before the first step inside — DATE
- [ ] Walk every room; work every sash, every lock, every door — DATE
- [ ] Probe the sills and show her what you find, in her hands — DATE
- [ ] Photograph the worst three openings while she watches — DATE
- [ ] Ask what it costs her in life, not in dollars, and write her words down — DATE
- [ ] Name the four fears out loud before she has to: the hole, the deposit, the mess, the questions — DATE
- [ ] Give the three addresses within two miles she can drive past tonight — DATE
- [ ] Present the expensive option first, then the middle, then the smaller scope — DATE
- [ ] Leave the written audit whether she buys or not — DATE
- [ ] Propose the measure appointment on a specific date before you leave the driveway — DATE

Objections and Replies — Window and Door Installation

The ones this trade actually hears, with what each really means. Write your own reply in the third column, in your own words, and say it out loud until it sounds like you.

WHAT THEY SAY	WHAT IT REALLY MEANS	YOUR REPLY
Your price is a lot higher than the other quote.	I cannot see one single difference between you and him, so I am deciding on the only number I understand.	
My brother-in-law says he can do it for half.	I do not want to pay retail to a stranger when family is standing right there.	
Can you just fix the foggy one instead of replacing it?	I want the smallest bill that makes the problem stop.	
I think we will wait until spring.	I am not scared of the price, I am scared of the mess and the commitment.	
How do I know you will not take my deposit and disappear?	I have read the stories and I have no reason yet to trust you.	
Do I have to be home the whole day?	I do not want strangers alone in my house, and I do not want to burn a vacation day either.	
How long is my house going to be open?	It is going to rain, and there is going to be a hole in my wall.	
Can you match the windows we already have?	I do not want my house to look patched together from the street.	

Review Request Script

Asked on site, at the walk-through, phone in hand. Thirty seconds, and almost nobody in this trade does it.

Your exact words, written out and said aloud until they stop sounding rehearsed.

The moment in the walk-through when you ask — name it precisely.

What you say when she says she will do it later, and the one message you send that evening.

How you ask again at the check-up visit, when she has lived through a cold snap.

What you do with a review that is not five stars — who calls, how fast, and what you say.

First-Hire Scorecard

Five yeses before you post the job. Four is not enough, and the fifth is the one everybody skips.

SIGNAL	YES / NO	EVIDENCE
Turning away work weekly		
Working more than fifty-five hours		
Callbacks rising		
Cash covers eight weeks of wages		
A written job description exists		
A training week is on the calendar		
A ninety-day exit plan exists		

30 / 60 / 90 Ramp Plan

Written before he starts. What he does, what he is allowed to decide, and what you check at each stage.

MILESTONE	DAY 30	DAY 60	DAY 90

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

Names where you have them, question marks where you do not. Write what you hand off first at each level.

At the first level: who does what, and the first thing you hand off.

At the second level: who is on the tools, who is not, and who answers the phone.

At the third level: two crews, two standards — who inspects, and how often.

The job you will personally never hand off, and why that is a decision rather than a habit.

The thing you are secretly worst at, and who covers it at each level.

Twelve-Month Forecast

Demand index first, then your jobs, then your average ticket. Find the two months where profit goes negative — those months are the plan.

MONTH	DEMAND INDEX	JOBS	AVG TICKET	REVENUE	COSTS	PROFIT
Jan	0.80					
Feb	0.84					
Mar	0.97					
Apr	1.10					
May	1.07					
Jun	1.14					
Jul	1.13					
Aug	1.18					
Sep	1.07					
Oct	1.00					
Nov	0.91					
Dec	0.79					
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. The deposits-held column is the one that keeps you honest — that money is not yours until the units are paid for.

WEEK	CASH IN	CASH OUT	BALANCE	DEPOSITS HELD	NOTES

Profit First Allocations

Split it the day it lands, on a fixed day, before you spend any of it. Then run the business out of what is left.

ACCOUNT	TARGET %	THIS MONTH $	ACTUAL %
Income (all deposits and payments)			
Profit			
Owner pay			
Tax			
Operating expenses			
Materials / subs pass-through			

KPI Scorecard — Window and Door Installation

Benchmarks for this trade are printed on each line. Mark yours beside them weekly, in pen, and watch the direction rather than the number.

MEASURE	W1	W2	W3	W4	W5	W6	W7	W8	W9	W10	W11	W12
Gross profit margin (residential remodeling contractors) (target 29.9%)												
Net profit margin (well-run company) (target 21%)												
Customer retention rate (target 79%)												
Customer acquisition cost (organic) (target 212 USD)												
Inbound call booking rate (target 42%)												
Jobs completed per technician per day (target 4 jobs/tech-day)												
Technician utilization rate (target 70%)												
First-time fix rate (target 80%)												

WEEK NOTES

Monthly P&L

Five lines a month. If the last one embarrasses you, the fix is in the pricing chapter, not in more Saturdays.

MONTH	REVENUE	MATERIALS + SUBS	LABOR	OVERHEAD	NET PROFIT

Days 1–30: Get Cash

One outcome this month: one paying job, done well, photographed, with a review on the board.

- [ ] Entity filed, EIN obtained, business account and card open — DATE
- [ ] General liability bound before you touch anybody's house — DATE
- [ ] Lead-safe firm certification started and the renovator class booked — DATE
- [ ] Supplier dealer account application submitted — DATE
- [ ] Business profile claimed, filled in completely, with photos of your own work — DATE
- [ ] One-liner written and put on the voicemail, the sign, the shirt and the text signature — DATE
- [ ] One hundred warm names written down before a single message goes out — DATE
- [ ] Warm outreach started: one message a day, personally, leading with the audit — DATE
- [ ] Attraction offer live in week one — the room-by-room audit, named and offered — DATE
- [ ] Twelve audits done, whether they buy or not — DATE
- [ ] Three-option quote used on every single estimate — DATE
- [ ] First job installed, photographed at every stage, and the review asked for on site — DATE

Days 31–60: Get More Cash

Sell more to the people already in front of you, and raise the price once.

- [ ] Upsell offered on every job while the problem is visible, not at the signing table — DATE
- [ ] Door upsell offered on every window job — DATE
- [ ] Trim capping offered whenever the ladder is already up — DATE
- [ ] Price raised one step and the nos counted on the next five quotes — DATE
- [ ] Downsell script practised: change what they get or how they pay, never the price of the same scope — DATE
- [ ] Phone answered within four rings or returned inside the hour, every day, tracked — DATE
- [ ] Content habit started: one before-and-after a week, including the sill pan and the foam — DATE
- [ ] Every job's photos filed against the job, not lost in the camera roll — DATE
- [ ] Job-start and job-close checklists used on every job with no exceptions — DATE
- [ ] Measure sheet signed by the homeowner before every order — DATE
- [ ] Break-even hourly rate recalculated with real numbers from the first month — DATE
- [ ] Second month's cash log completed weekly, including the deposits-held column — DATE

Days 61–90: Get the Most Cash

Build the thing that keeps producing after you stop pushing. Then make the hire decision honestly.

- [ ] Every check-up visit booked and actually attended — DATE
- [ ] Every manufacturer warranty registered in the customer's name, confirmation sent — DATE
- [ ] Referral ask made to every finished customer, naming exactly who you want — DATE
- [ ] Referral reward decided, written down, and handed over in person when earned — DATE
- [ ] Reviews counted; every one under five stars called personally within a day — DATE
- [ ] Twelve-month forecast built with this trade's seasonality and the slow months planned — DATE
- [ ] Profit First percentages set and the first transfer actually made — DATE
- [ ] KPI scorecard filled in for three consecutive weeks — DATE
- [ ] First-hire scorecard run honestly against all five signals — DATE
- [ ] Job description and training week written, whether you hire or not — DATE
- [ ] Pre-mortem completed and the five tripwires written on the milestones page — DATE
- [ ] Next ninety days planned before this one ends — DATE

Milestones and Tripwires

A date beside every milestone, and the early signal that tells you it is going wrong while you can still change it.

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

Decision Log

Every real decision, why you made it, and the date you will look at it again. In a year this is the most valuable page in the book.

DATE	DECISION	WHY	REVISIT ON