GROW AND PROFIT

GET YOURSELF OUT OF THE TRUCK

The business can only grow as far as the owner can stop doing everything.

THE OWNER'S TRAP

Most companies begin with a skilled tradesperson who's good at the work. Customers ask for them by name. They answer the phone, price the jobs, fix what went wrong and do the books at night. It works, until it doesn't. Eventually the owner becomes the bottleneck for every decision.

If you couldn't take two weeks off without the business slowing down, you own a very demanding job.

KNOW WHAT YOUR TIME IS WORTH

For one week, write down what you do, in half-hour blocks. Mark each one:

- **Only I can do this.** Strategy, key relationships, hiring leaders.
- **Someone else could do this with training.** Scheduling, estimating, ordering, routine approvals.
- **Shouldn't be done at all.** Unnecessary reports, or solving problems that a clear rule would prevent.

Most owners find that a surprising share falls into the second and third groups. Start by handing off the task that takes the most time and is the easiest to teach.

WRITE DOWN HOW YOU DO IT

Your team can't copy what's only in your head. You don't need a giant manual. Start with the ten things that go wrong most often when you're not around.

- Record yourself on video doing the task.
- Have someone write down the steps.
- Let them do it, and correct the steps.
- Keep it where everybody can find it.

Build out from there: how we book, how we dispatch, how we close out a job, how we handle a complaint.

HIRE OR DEVELOP THE RIGHT FIRST LEADERS

The order differs for each business, but many companies need these first:

1. A strong office lead or dispatcher
2. A bookkeeper who closes the books on time
3. A service or field manager
4. Someone responsible for sales or marketing

Don't promote your best tech to manager just because they're your best. It may cost you a great tech and give you a poor manager. Look for the person others already go to for help. Give them training. Managing people is a skill too.

DEFINE DECISIONS

Your team keeps coming to you because you've taught them to. Set clear limits:

- A tech can approve a warranty repair up to a set amount.
- A CSR can offer a set credit to resolve a complaint.
- A manager can reschedule a job without checking with you.

When someone asks you something that they could have decided, ask "What do you recommend?" Back them up when they make a reasonable decision, even if you'd have done something different.

RUN THE BUSINESS ON A RHYTHM

- **Daily:** a 10-minute huddle on today's board and problems
- **Weekly:** a leadership meeting on the numbers and one priority
- **Monthly:** financial review, and individual one-on-ones
- **Quarterly:** set three priorities for the next 90 days

Regular meetings replace a hundred interruptions.

BUILD VALUE, NOT JUST INCOME

A business that depends entirely on its owner is hard to sell, and hard to walk away from. Buyers and lenders look for clean financials, recurring revenue, a stable team and processes that don't rely on one person. Maintenance plans, a well-organized customer database and accurate records make a company more valuable. Even if you never plan to sell, those same things let you take a real vacation.

REPLACE YOURSELF IN STAGES

You won't do this in a month. Try this sequence:

1. Stop running calls, except for emergencies.
2. Stop being the backup dispatcher.
3. Stop approving routine purchases.
4. Stop being the only one who can price a job.
5. Stop being the person everyone calls.

Then take a week off and leave the phone behind. What breaks is your to-do list for the next quarter. Software helps, because when everyone can see the board, the customer history and the numbers, fewer questions need you. Service partners can help too. Choose what you want to keep doing, then build the business around that.

Sources: Service ProCall program guidance.

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BEST PRACTICES: THE OWNER IS THE BOTTLENECK

MAKE IT A HABIT

What good looks like

> The business runs for 30 days without you.

> Each key job has a written process and a person who owns it.

> You spend more time on the business than in it.

The habits

1. Write down the jobs only you do today, and hand off one a month.
2. Put processes in writing: booking, dispatch, sales follow-up and billing.
3. Give people numbers to own, and review them weekly.
4. Hire or outsource the work that ties you to the phone.
5. Keep clean books and records a buyer or lender can trust.
6. Plan your exit years ahead, even if you never sell.

Signs it's time to get help

- You answer customer calls at night and on weekends.
- Nothing gets decided when you are away.
- Your best people wait for you to make every call.

How one shop did it: Rogers Heating, Cooling, Electrical (Lynchburg and South Boston, Virginia). Spent a year hiring, training and building processes, and put a trusted leader over the call center. The company's vice president took a July 4th weekend off in peak season and the calls were handled without her. She notes it took more than one false start with hiring to get there. Contracting Business, August 17, 2026

Where we fit: Service ProCall takes the phones and the follow-up calls off your plate, and ProCall Field puts the processes in one system.

More on the owner is the bottleneck