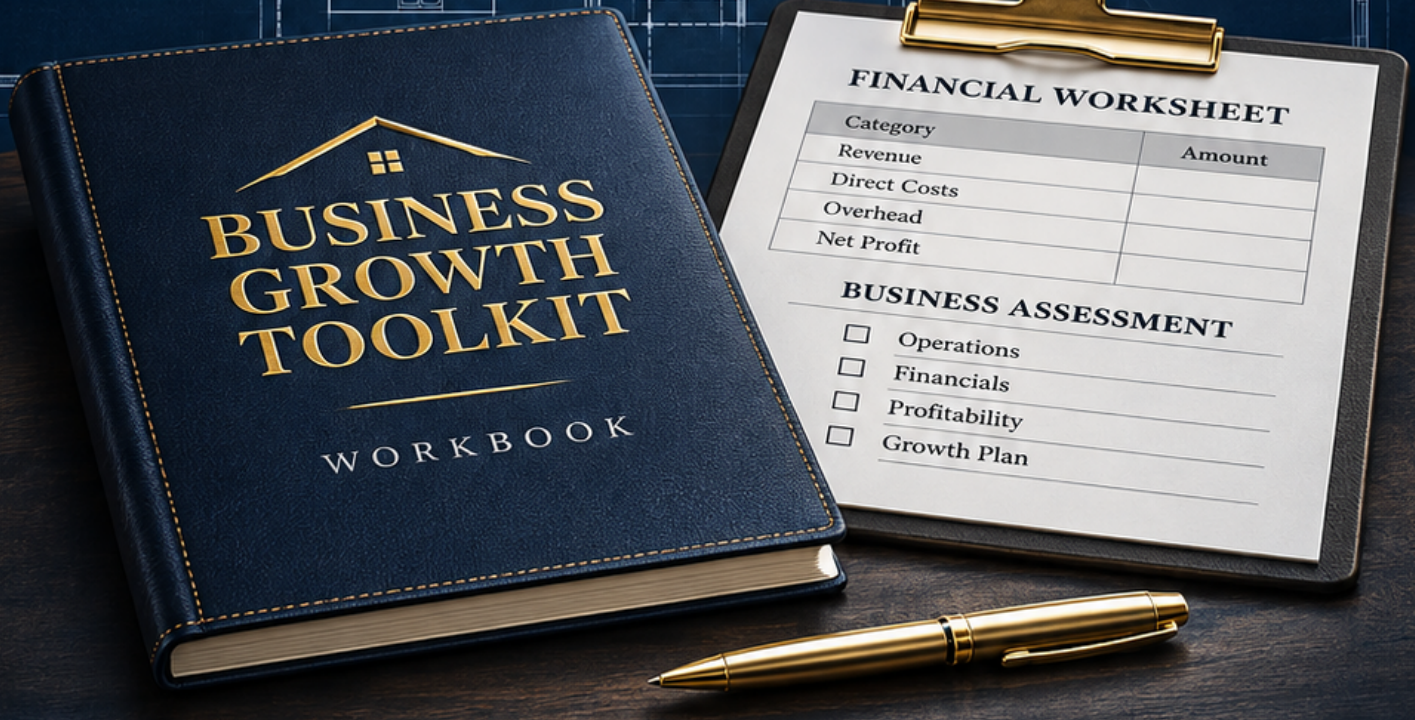
BGS
CONTRACTOR GROWTH

GROWTH STARTER TOOLKIT

Build Your Business. Build Your Team. Build Your Life.

BUSINESS GROWTH TOOLKIT

Assess Your Business. Find the Money. Build the Plan.



STARTER WORKBOOK • FIND THE MONEY • SAMPLE ASSESSMENT

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Original section page numbers and worksheet references are retained.

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START HERE

Growth starts with a plan.

Build Your Business. Build Your Team. Build Your Life.

> Use this workbook on screen or in print. Save a separate copy for each cycle. Fields are fillable; calculations are manual. Begin with evidence, then choose priorities. You do not need to complete every page today.

Business / trade / market

Owner / cycle leader

Cycle start / end dates

YOUR FIRST THREE MOVES

01 Gather a recent profit-and-loss report, job report and lead report.

02 Complete the baseline on page 2. Mark unknown numbers as unknown.

03 Book a weekly review and identify one opportunity to investigate.

My first action, owner and deadline

What would a stronger business make possible for my team and life?

Use pages 2-3 in weeks 1-2 and pages 4-8 in weeks 3-4. Reuse pages 9-13 during execution. Complete the results review on page 14.

WORKSHEETS

05

Map the 90-day cycle

Use the 13-week rhythm. Enter calendar dates for your actual cycle.

> Thirteen weeks is a planning rhythm (91 calendar days). Use your chosen start and end dates to define the actual cycle.

Stage	Dates	Deliverable / owner
Week 1: Assess		
Week 2: Find the money		
Week 3: Choose top three		
Week 4: Build the plan		
Weeks 5-8: Execute / train		
Weeks 9-11: Optimize		
Week 12: Review results		
Week 13: Reset		

Recurring review day / time / attendees

REFERENCE

Use the numbers well

Working definitions for this starter toolkit. Align them with your own reports.

Revenue

Sales for the stated reporting period. Keep revenue separate from cash collected.

Gross profit and margin

Revenue less the direct costs included in your accounting report. Gross margin = gross profit / revenue x 100. Keep cost classifications consistent.

Operating profit

Use operating profit from the same-period profit-and-loss report. Confirm which expenses your report includes.

Lead conversion

Won jobs / qualified leads x 100, using a matched lead cohort. Define qualified and won before tracking.

Average job value

Completed-job revenue / completed jobs for the same period. Avoid mixing invoices and jobs without explaining the difference.

Productivity

Productive hours / paid hours x 100. Define productive time and use the same definition every week.

Margin opportunity

Same-period revenue x (target margin minus current margin). Example: $100,000 x (0.42 - 0.40) = $2,000 gross-profit opportunity, before implementation costs.

Evidence before claims

Keep estimates separate from measured results. Record the source, dates and costs. A change during the cycle does not by itself prove what caused it.

TOOLKIT REFERENCE

Your next action

Keep the plan practical. Use the supporting modules when you need context or direction.

SUPPORTING MODULES

01 **Welcome / The Big Picture**
Mission and weekly rhythm.

02 **The Big Picture**
Clarity, focus and repeatable improvement.

03 **The 7 Step Method Explained**
Seven-step operating sequence.

04 **The 90-Day Cycle**
Weeks 1-13 and review cadence.

05 **Inside the SKOOL Community**
Tools, questions and coaching.

06 **Your Next Step**
Baseline, top three and onboarding.

07 **The 7-Step Method Review**
Action checks and cycle reset.

> The working sequence: Assess, Find the Money, Build the Plan, Train, Execute, Measure, and Coach & Improve. These worksheets support planning; they are not an official scored assessment or a verified client result.

My next action / owner / due date

Click: https://go.bgsstrategies.com

STEP 1 OF 6

Get Your Business Score and Profit Plan

Go to https://go.bgsstrategies.com

go.BGSstrategies.com

Establish the company profile used throughout your BGS Strategies assessment.

START WITH THE BASELINE

Tell us about the company as it operates today. Use actual numbers whenever possible.

Company

Company Name

Primary Trade

Primary Market / City

Years in Business

Ownership Structure

Scale

Annual Revenue ($)

Employees

Service Technicians

Install Crews

CSRs / Dispatchers

Business Mix

Residential %

Commercial %

Service % of Revenue

Replacement / Install % of Revenue

Owner

Primary Constraint

Click: https://go.bgsstrategies.com

STEP 2 OF 6

Know Your Numbers

Go to https://go.bgsstrategies.com

go.BGSstrategies.com

Use trailing-12-month or most recent annualized results.

USE REAL DATA WHEN YOU CAN

Estimates are okay if you don't know a number yet. One purpose of the BGS Strategies assessment is identifying which numbers need to become visible.

KPI	CURRENT	TARGET
Revenue — Source: P&L	$ _____	—
Labor %	% _____	—
Material %	% _____	—
Gross Profit %	% _____	**> 50%**
Net Profit %	% _____	**> 15%**
Overhead %	% _____	—
Service Revenue	$ _____	—
Replacement Revenue	$ _____	—
Maintenance Revenue	$ _____	—
Cash on Hand (weeks)	_____	**8 min.**

BGS
CONTRACTOR GROWTH

GROWTH STARTER TOOLKIT

Build Your Business. Build Your Team. Build Your Life.

YOUR BGS CONTRACTOR GROWTH

Robert, here's where your business deserves attention first.

BLUEPRINT SCORE

77

/ 100

Your score combines financial health, operating performance and leadership execution based on the information you provided.

FINANCIAL HEALTH	OPERATIONS	LEADERSHIP
84 / 100	82 / 100	65 / 100

ASSESSMENT SUMMARY

Your financial and operating foundations are comparatively strong. The clearest opportunity is to translate that performance into more consistent leadership systems, manager accountability and owner independence.

FIND THE MONEY

Where Is the Revenue Hiding?

These estimates show the annual revenue associated with closing specific performance gaps. They are diagnostic opportunities, not additive guarantees.

LARGEST MEASURABLE OPPORTUNITY

$128,526 Average Service Ticket

01 SERVICE
Average Service Ticket

$128,526
ESTIMATED ANNUAL OPPORTUNITY

CURRENT	TARGET	
$357	$450	93 average-ticket gap

02 REPLACEMENT / SALES
Replacement Conversion

$104,638
ESTIMATED ANNUAL OPPORTUNITY

CURRENT	TARGET	
51%	55%	9 additional replacement sales

03 SERVICE
Service Call Conversion

$24,669
ESTIMATED ANNUAL OPPORTUNITY

CURRENT	TARGET	
80%	85%	69 additional converted calls

YOUR TOP 3

90-Day Growth Priorities

Ranked by financial impact, performance gap and the ability to make meaningful progress during the next 90 days.

01 Average Service Ticket

ESTIMATED ANNUAL OPPORTUNITY
$128,526

GAP TO TARGET
$357 to $450

PRIORITY SCORE
79

02 Replacement Conversion

ESTIMATED ANNUAL OPPORTUNITY
$104,638

GAP TO TARGET
51% to 55%

PRIORITY SCORE
65

03 Service Call Conversion

ESTIMATED ANNUAL OPPORTUNITY
$24,669

GAP TO TARGET
80% to 85%

PRIORITY SCORE
34

IMPORTANT

Individual opportunities can overlap. Do not add them together or interpret them as guaranteed incremental revenue.

90-DAY GROWTH PRIORITY

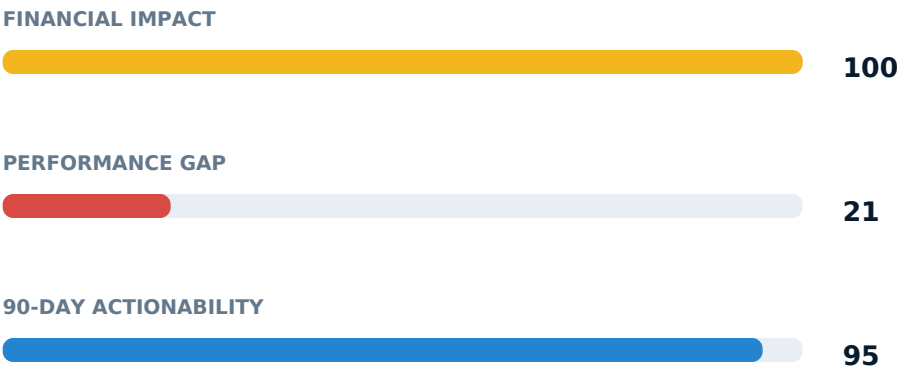
01 SERVICE

Average Service Ticket

ESTIMATED ANNUAL REVENUE OPPORTUNITY	CURRENT	TARGET
$128,526	$357	$450

PRIORITY SCORE

79
/ 100



90-DAY FOCUS

Technician coaching, pricing discipline, option presentation, ride-alongs and weekly average-ticket review.

90-DAY GROWTH PRIORITY

02

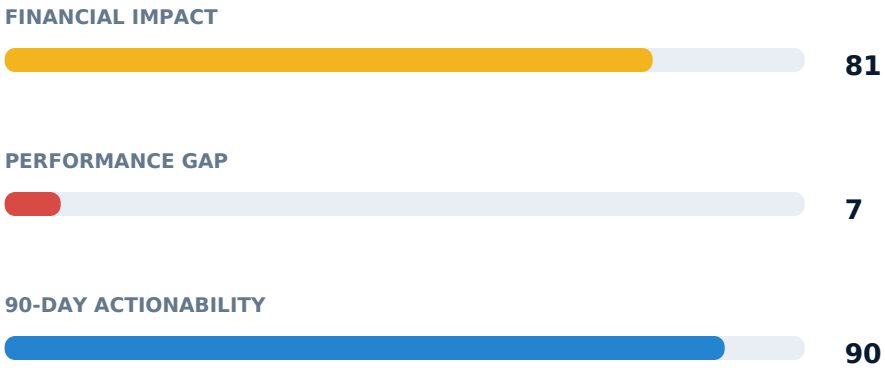
REPLACEMENT / SALES

Replacement Conversion

ESTIMATED ANNUAL REVENUE OPPORTUNITY	CURRENT	TARGET
$104,638	51%	55%

PRIORITY SCORE

65
/ 100



90-DAY FOCUS

Sales process coaching, financing, option presentation, lead follow-up and weekly replacement-conversion review.

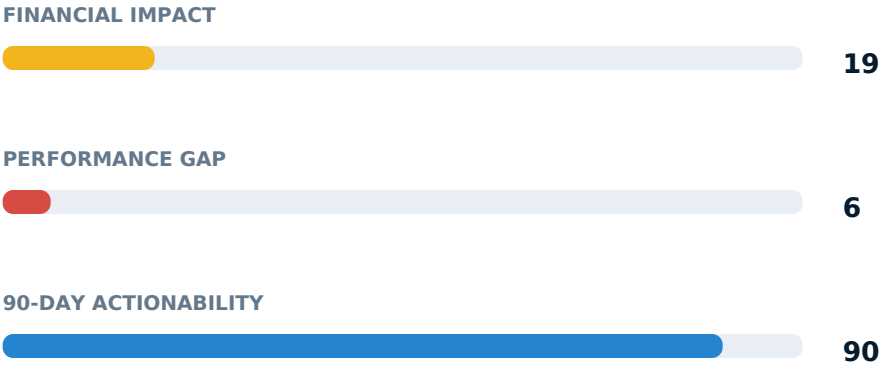
90-DAY GROWTH PRIORITY

03 SERVICE
Service Call Conversion

ESTIMATED ANNUAL REVENUE OPPORTUNITY	CURRENT	TARGET
$24,669	80%	85%

PRIORITY SCORE

34 / 100



90-DAY FOCUS

Technician communication coaching, diagnosis, options presentation, ride-alongs and weekly conversion review.

PERFORMANCE GAPS

How Your Numbers Compare

KPI	CURRENT	TARGET	SCORE
Inbound Call Booking %	92%	90%	100
Service Call Conversion %	80%	85%	94
Average Service Ticket	$357	$450	79
Tech Revenue / Day	$0	$1,500	0
Replacement Lead Conversion %	51%	55%	93
Average Replacement Ticket	$11,945	$14,000	85
Maintenance Agreement Conversion %	31%	40%	78
Callback %	4%	3%	75
On-Time Arrival %	90%	90%	100
Install Gross Margin %	47%	48%	98
Service Gross Margin %	62%	65%	95

LEADERSHIP BASELINE

Can the Business Run Without You?

LEADERSHIP

Clear organizational chart and accountability for every key seat

2/5

PERFORMANCE

Technicians receive regular performance coaching

4/5

LEADERSHIP

Managers know the KPIs they own

3/5

PERFORMANCE

Underperformance is addressed quickly and consistently

4/5

LEADERSHIP

Managers coach employees weekly rather than only firefighting

4/5

CULTURE

Core values are used in hiring, coaching and recognition

5/5

PEOPLE

Every key role has a written scorecard and clear expectations

4/5

CULTURE

Employees understand how their work contributes to company goals

4/5

PEOPLE

Consistent recruiting and hiring process

2/5

MEETINGS

Leadership meetings produce commitments

2/5

PEOPLE

Documented onboarding plan for new employees

2/5

SUCCESSION

Business operates effectively when the owner is away

3/5

THE NEXT STEP

Don't just know the gaps. Build the plan to close them.

Your next BGS Contractor Growth step is turning these findings into a focused 90-day execution plan with clear outcomes, weekly actions, milestones and coaching cadence.

BUILD MY 90-DAY PLAN

YOUR STARTING POINT

Blueprint Score

77 / 100

TOP OPPORTUNITIES

01 Average Service Ticket

$128,526

02 Replacement Conversion

$104,638

03 Service Call Conversion

$24,669