

THE OPERATOR'S STARTER KIT

Crack The Contractor Code.

Audit first. Then build. How HighLevel agency owners take a contractor from Today's Truth, across The Value Gap, to The Next Level.

6

GFT MODELS

3

WORKSHEETS

1

KPI CALCULATOR

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START HERE

How to use this kit

This isn't a book you read once. It's a kit you work from:
before the call, on the call, and every week after the yes.

📖 BEFORE THE CALL

- Learn the Value Gap and the Audit Path (pp. 7–8).
- Know the five numbers cold (pp. 14–20).
- Score yourself on the 7 Human Codes (p. 33).

☎ ON THE CALL

- Run the TRADES first call (p. 27).
- Fill in Today's Truth with the owner (p. 10).
- Put the gap in dollars with the Calculator (p. 21).

✓ AFTER THE YES

- Rank every fix on the Install Order Grid (p. 11).
- Write The Next Level with the owner (p. 12).
- Install, test, review weekly (pp. 27–31).

How to read the pages

Same signals on every page, so you can scan it on a call.

|| EXAMPLE NUMBERS

Made-up round numbers that show how the math works. Never a benchmark, never a prediction.

🎯 AIM FOR • DIRECTIONAL

What strong shops commonly aim for. Directional only. Their own baseline is the real starting line.

🗉 SAY IT LIKE THIS

Word tracks you can use as written, or rewrite in your own voice.

⚡ INSTALL IN HIGHLEVEL

The build that moves the number. Menu names shift as HighLevel updates; the logic won't.

Find the leak. Put a dollar figure on it. Test the fix. Prove it with their numbers.

THE WHOLE KIT, IN ONE LINE

THE THREE RULES

No promises. We talk about moving numbers, and we prove it with theirs.

Their numbers. Baseline first. Every claim comes from their phones, calendar, and FSM.

One fix at a time. Biggest leak first. Show the result. Then go after the next one.



In this kit: this PDF and the **Missed Call & KPI Calculator** (.xlsx). Yellow cells are the inputs. Everything else calculates.

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ALSO IN THIS KIT

Missed Call & KPI Calculator (.xlsx). Put in the contractor's real numbers, test a few points, and walk them through the math live.

Operator first. Tools second.

RYAN FISHER

READ THIS FIRST

Tools don't fix a business. Knowing the business does.

Let me tell you where I'm coming from. I owned a home service company for eight years and grew it into something big. Then one marketing mistake, all my eggs in one basket, and my main lead source was gone overnight. I rebuilt. So when I talk about missed calls, no-shows, and estimates dying in a drawer, I'm not reading it off a slide. I lived it from the owner's chair.

Here's what I see right now. Contractors are getting hit with a **fire hose of AI**. Every week someone new pitches them a bot, an agent, a dashboard. Most of those builders mean well. But if you don't understand how the business runs, and you don't guide the owner from **Today's Truth**, across **The Value Gap**, to **The Next Level**, the tool just adds chaos. The owner gets overwhelmed. A lot of them walk away from all of it.

Here's what I hear from contractors over and over: **"I know I need AI. I just need someone I trust to implement and execute it."** That someone is you.

HighLevel is the foundation. You can build almost anything on it. Plug-and-play SaaS plans are a great model, and for a lot of shops they're exactly right. We run that model too. But if you want to stand apart, you go further. You prospect. You close. And the second they say yes, you stop selling and start **serving**: you audit their calls, their calendar, their FSM, their numbers. Then you show them what they need, not what's shiny this week.

When you know which KPI to move in their world, and you use HighLevel, AI, and automations to move it, even **1 to 10 points** on the right number can change the direction of their business. That's how you become the agency they can't run without.

One thing up front: **I'm not going to promise you numbers**. Nobody honest can. Every shop, market, and season is different, and every example in this kit is labeled. Find the leak. Put a dollar figure on it. Test the fix. Prove it with their numbers. That's how you Crack The Contractor Code.

Let's go to work.

Ryan Fisher

Founder, GHIL for The Trades & TradesPilot OS



**Operator first.
Tools second.**

WHO THIS IS FOR

HighLevel agency owners, operators, freelancers, and VAs who serve home service businesses. Beginners and veterans.

ONE PAGE

Crack The Contractor Code at a glance

The whole kit on one page. If you only remember this, you're ahead of most of the market.

TODAY'S TRUTH

Where the business really is. Their numbers, their leaks, their habits.



THE VALUE GAP

The distance tools alone never close. This is where your value lives.



THE NEXT LEVEL

Where the owner wants it. Booked out, predictable, in control.

It's not more features, more workflows, more AI. It's YOU.

The six models

MODEL 01

p. 7

The Value Gap

Where the business is vs. where the owner wants it. The operator closes the distance.

MODEL 06

p. 8

The Audit Path

Audit · Diagnose · Prioritize · Test · Install & Execute · Review Weekly.

MODEL 02

p. 11

The Install Order Grid

Install Now → Plan It → Quick Win. Never the Chaos Zone.

MODEL 04

p. 14

The KPI Chain

Leads × Answer × Booking × Show × Conversion × Average Sold Ticket.

MODEL 05

p. 27

The TRADES First Call

Trust · Reveal · Add it up · Demonstrate · Earn the yes · Serve.

MODEL 03

p. 33

The 7 Human Codes

Identity · Discipline · Fluency · Thinking · Leadership · Serving · Resilience.

The five numbers, plus a bonus

Leads & CPL

spend ÷ leads

Answer Rate

answered ÷ inbound

Booking Rate

booked ÷ answered qualified

Show Rate

run ÷ booked

Conversion Rate

sold ÷ run

Avg Sold Ticket

revenue ÷ sold jobs

Revenue = Leads × Answer × Booking × Show × Conversion × Average Sold Ticket. Every link multiplies the next.

FIRST WEEK

Fill in Today's Truth. Listen to 20 calls with the owner. Run the Calculator.

FIRST FIX

The biggest leak with the fastest install. Install Now quadrant. One fix, not five.

EVERY WEEK

15 minutes. Baseline vs. now, in their numbers. One win, one leak, one next action.



PART 1

The Framework

Two models run everything in this kit. The Value Gap tells you **why** contractors stall. The Audit Path tells you **how** you close it.

“The platform isn’t the advantage. The operator is.”

RYAN FISHER

THE VALUE GAP

p. 7

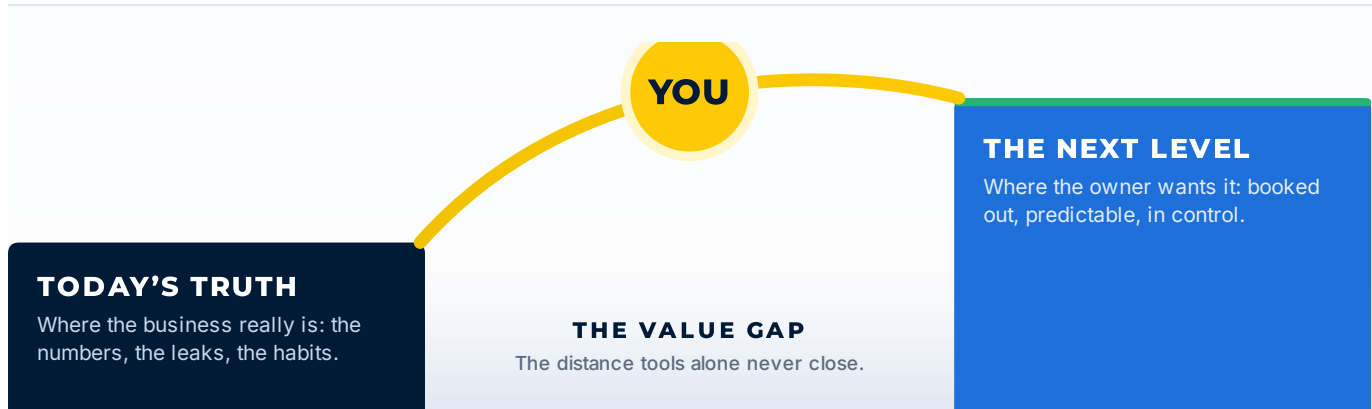
THE AUDIT PATH

p. 8

GFT MODEL 01 • THE CENTERPIECE

The Value Gap

Every contractor lives somewhere between where the business really is and where the owner wants it to be. There's always a gap in the middle. That's where your value lives, or where it dies.



It's not more features, more workflows, more AI. It's YOU.

GFT MODEL 01 / THE VALUE GAP

CRACK THE CONTRACTOR CODE

Q TODAY'S TRUTH

Missed calls. Estimates in a drawer. The owner on the phone at 9pm. Numbers nobody tracks. Five tools nobody uses.

△ THE VALUE GAP

More features, more workflows, more AI. None of it closes the gap on its own. Tools are bridge material. Somebody has to build the bridge.

▮ THE NEXT LEVEL

KPIs moving, 90 days out. The right systems doing the work. More time, less chaos, a business that runs without them.

I know I need AI. I just need someone I trust to implement and execute it.

WHAT CONTRACTORS TELL US

MEASURE THE GAP

Today's Truth (p. 10) minus The Next Level (p. 12), in dollars, with the Calculator. That number is the conversation.

CLOSE THE GAP

The Audit Path on the next page. Six steps, one leak at a time. Then the next leak.

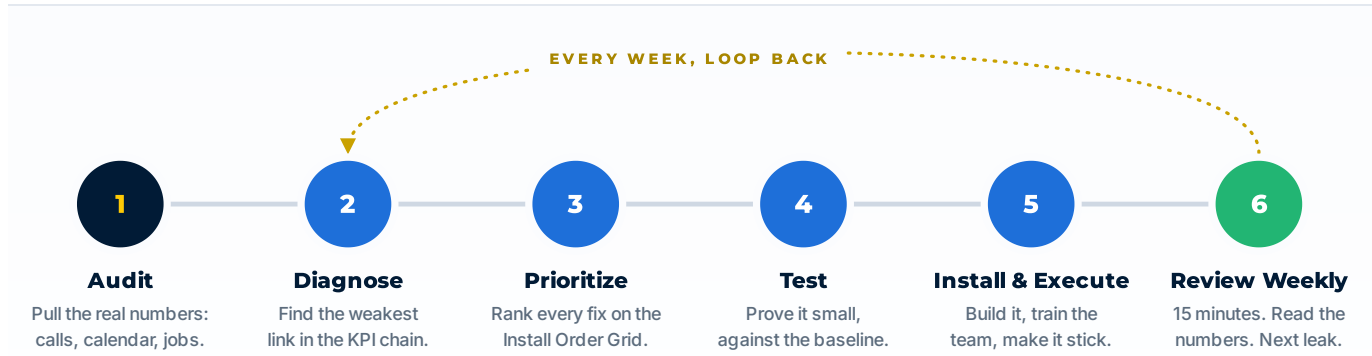


Who closes it? You. The trusted operator who audits, implements, and executes. HighLevel, AI, and automations are how you do it. Score yourself on the 7 Human Codes on p. 33.

GFT MODEL 06 · THE METHOD

The Audit Path: audit first, then build

You don't walk in with a tool. You walk in with questions, find out what's really happening, and guide the owner from Today's Truth to The Next Level.



The audit isn't a one-time event. It's a weekly rhythm.

GFT MODEL 06 / THE AUDIT PATH

CRACK THE CONTRACTOR CODE

1 Audit Pull 30–90 days of numbers. Listen to 20 calls with the owner. Map the lead journey. No building yet. → Today's Truth	2 Diagnose Run the numbers through the KPI chain. Find the weakest link and where the dollars fall out. → The biggest leak, in dollars	3 Prioritize Score every fix on the Install Order Grid. Pick the one with the most dollars and the fastest install. → The one fix
4 Test Pilot it small: one line, one crew, or one lead source for 2–4 weeks. Same counting rules as the baseline. → Before vs. after, in their numbers	5 Install & Execute Roll out what worked. Train the people. Load the scripts. Make it fit how the shop runs. → A system the team uses	6 Review Weekly 15 minutes, same day every week. One win, one leak, one next action. → The next leak

⚠ TOOL-FIRST = CHAOS

- “Here’s our AI” before anyone looks at a call log
- Bots stacked on a broken process. The leak just gets faster.
- No baseline, so nobody can prove anything moved

✓ AUDIT-FIRST = VALUE

- Starts with their numbers, their calls, their journey
- Fixes the biggest leak first, with a dollar figure on it
- Tested against the baseline, so the result is theirs

The yes isn't the finish line. It's the moment you stop selling and start serving.

RYAN FISHER

02

PART 2

The Audit

Before you build anything, find out what's really happening. Three worksheets: where they are, what to fix first, and where they're going.

“Diagnose before you prescribe. Technology is the prescription, not the diagnosis.”

RYAN FISHER

TODAY'S TRUTH

p. 10

THE INSTALL ORDER GRID

p. 11

THE NEXT LEVEL

p. 12

STEP 1 • AUDIT • WORKSHEET

Today's Truth

Fill it in **with** the owner, from the last 30–90 days. "I don't know" is a finding. Write it down and start tracking this week.

Shop _____ Period _____ Date _____

THE NUMBER	TODAY	SOURCE • HOW IT WAS COUNTED
Leads (unique, per month) new people who raised a hand	_____	_____
Marketing spend & cost per lead spend ÷ leads, by source	_____	_____
Answer Rate answered ÷ inbound calls	_____	_____
Abandoned calls hung up before anyone picked up	_____	_____
Booking Rate (of answered) booked ÷ answered qualified	_____	_____
Booking Rate (of all qualified) booked ÷ all qualified leads	_____	_____
Show Rate run ÷ booked	_____	_____
Conversion Rate sold ÷ run	_____	_____
Average Sold Ticket revenue ÷ sold jobs	_____	_____
Opportunity Average revenue ÷ all appointments run	_____	_____
Callback Rate callbacks ÷ completed jobs	_____	_____

🎧 **LISTEN TO 20 CALLS**

1	2	3	4	5	6	7	8	9	10
11	12	13	14	15	16	17	18	19	20

Mark each **B** booked • **N** not booked • **X** not a lead.

Booked _____ Not booked _____

Top reason they didn't book _____

💬 **THE OWNER, IN THEIR WORDS**

What's the most frustrating part of the business right now?

What have you already tried that didn't stick?

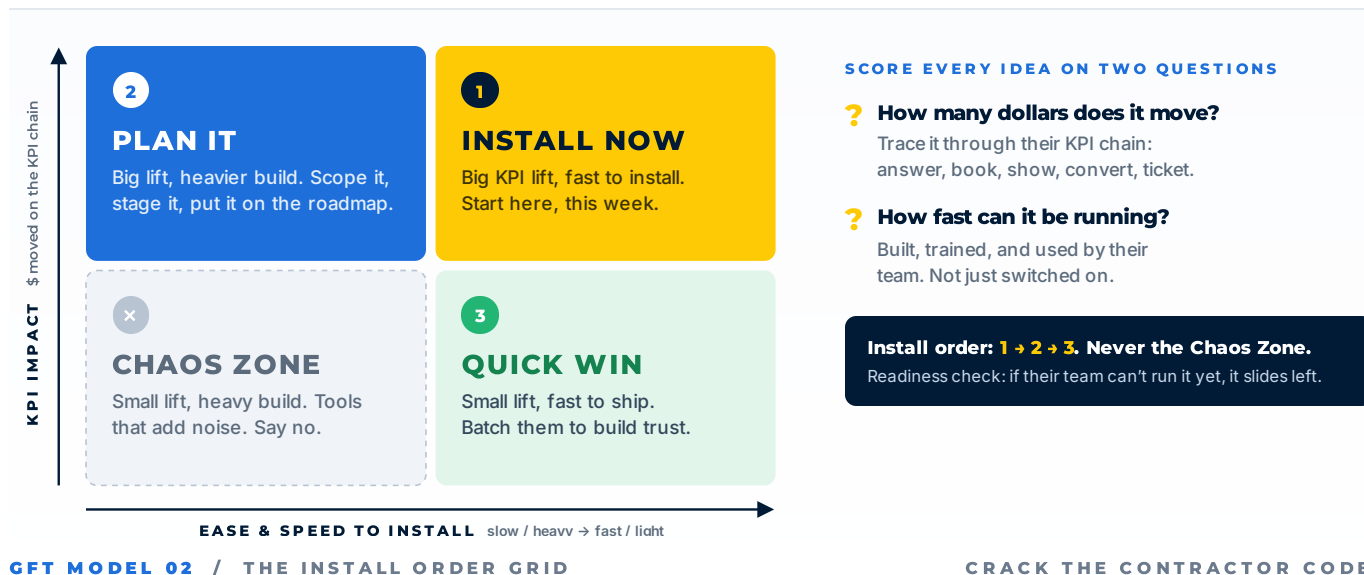
📅 **MAP THE LEAD JOURNEY: WHAT HAPPENS TODAY, AND WHERE IT LEAKS**

First contact who or what answers? _____ _____	Booked how, and how fast? _____ _____	Confirmed texts? reminders? _____ _____	Ran on time? on my way? _____ _____	Estimate options? financing? _____ _____	Follow-up who calls? when? _____ _____	Invoice + review ask? tech named? _____ _____	After the job member? reactivation? _____ _____
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STEP 3 • PRIORITIZE • GFT MODEL 02

The Install Order Grid

You'll find ten things to fix. Don't fix ten things. Score every idea on two questions, then install in order.



Score the ideas

IDEA / FIX	KPI IT MOVES	\$ IMPACT	SPEED	QUADRANT
EXAMPLE Missed-call text back	Answer Rate	High	Fast	INSTALL NOW
EXAMPLE Full FSM integration	Several	High	Slow	PLAN IT
EXAMPLE Review request naming the tech	Reviews	Low	Fast	QUICK WIN
EXAMPLE A new chatbot nobody asked for	None clear	Low	Slow	CHAOS ZONE

Install Now is your one fix. Write it on The Next Level sheet (p. 12) and test it first.

Quick Wins ride along. Batch them to build trust. Never let them replace the one fix.

Chaos Zone: say no out loud. It protects the owner's attention, and yours.

STEPS 2-6 • TARGET SHEET

The Next Level

Three parts: **the numbers** 90 days out, **the system** that moves each one, and **the owner's why**. Set targets from their own baseline, a few points at a time. Leave a line blank if it's not the priority yet.

PARTS 1 + 2 • THE NUMBERS AND THE SYSTEM THAT MOVES EACH ONE

KPI	TODAY	90 DAYS OUT	SYSTEM THAT MOVES IT (CIRCLE OR WRITE IN)
Leads & Cost Per Lead	_____	_____	Tracking numbers, one inbox, reactivation _____
Answer Rate	_____	_____	Voice AI, missed-call text back, ring groups _____
Booking Rate (of all qualified)	_____	_____	CSR script, Voice AI booking, speed-to-lead _____
Show Rate	_____	_____	Confirmations, reminders, rebook flow _____
Conversion Rate	_____	_____	3 options, follow-up, second-look calls _____
Average Sold Ticket	_____	_____	Options, memberships, member value touch _____
Callback Rate	_____	_____	Callback tags, tech scorecards _____

THE ONE FIX

Biggest leak _____
 Dollars at risk a month (their math) _____
 Fix we install first _____

THE TEST

Pilot on _____
 Start _____ Check _____
 Baseline _____ Result _____

PART 3 • THE OWNER'S WHY

More time

What would you do with 10 hours a week back?

Less chaos

What would a calm Monday look like?

Runs without you

What has to be true to take two weeks off?

🕒 REVIEW WEEKLY

Same day, same 15 minutes, same counting rules. Today vs. last week vs. baseline. One win, one leak, one next action. Do a full Next Level review every month.

03

PART 3

The Numbers

Five numbers, plus a bonus, decide whether a home service company grows or grinds. Learn them. Ask about them. Move them.

**“Find the next tenth. Small improvements.
Repeated. Measured.”**

RYAN FISHER

THE SCORECARD

p. 14

THE FIVE KPIS + BONUS

p. 15

THE KPI CHAIN

p. 21

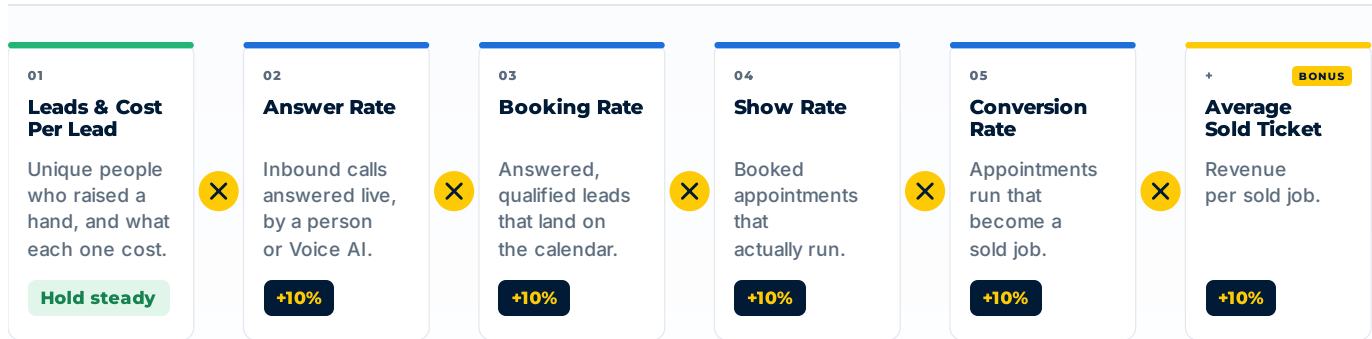
THE BUDGET MATH

p. 22

GFT MODEL 04 • THE SCORECARD

The Front Office Scorecard

Most of these numbers live in the front office.
That's exactly where HighLevel does its best work.



EXAMPLE MATH
Five 10% lifts don't add up to 50%.
They multiply.

$1.1 \times 1.1 \times 1.1 \times 1.1 \times 1.1 \approx 1.61 \times$
the same leads, run through a tighter chain

Example math only. Not a benchmark, not a promise of results. The audit finds their real numbers.

GFT MODEL 04 / THE KPI CHAIN

CRACK THE CONTRACTOR CODE

Fill this in with the contractor

#	KPI	FORMULA	BASLINE	THIS WEEK	FIX TO INSTALL
1	Leads & CPL	Unique leads · CPL = spend ÷ leads	_____	_____	Tracking numbers, one inbox
2	Answer Rate	Answered ÷ inbound · track abandoned	_____	_____	Voice AI, missed-call text back
3	Booking Rate	Booked ÷ answered qualified	_____	_____	CSR script, Voice AI, speed-to-lead
4	Show Rate	Run ÷ booked	_____	_____	Confirmations, reminders, rebook
5	Conversion Rate	Sold ÷ run	_____	_____	3 options, follow-up, second look
+	Avg Sold Ticket	Revenue ÷ sold jobs	_____	_____	Options, memberships

🎯 **AIM FOR • DIRECTIONAL**

Phones answered on the **first ring**, abandoned calls tracked. Booking around **70% of all qualified leads** as a floor before buying more leads; **85–90%** is elite. Everything else: beat their own baseline.

✓ **COUNT IT THE SAME WAY EVERY TIME**

- One window. Review weekly, roll up monthly.
- Unique people, not touches. Strip spam, vendors, existing jobs.
- Write down how you counted.

1

THE FRONT OFFICE SCORECARD • KPI 1 OF 5

Leads & Cost Per Lead

Volume, and what you pay for it. Every agency starts here, and most stop here. Leads matter. They're just the top of the chain.

PLAIN DEFINITION

Every new person who raised a hand for service in a set period: calls, forms, chats, ad leads, directory leads, referrals. Count **unique people**, not touches. Then put a price on each one, by source.

Lead Volume = new unique leads in the period

Strip spam, vendors, job seekers, and existing-job calls.

Cost Per Lead (CPL) = marketing spend ÷ leads

Run it per source. A blended number hides the channel that's bleeding.

Cost Per Sold Job = spend ÷ sold jobs

Tells you if a lead source actually pays.

🎯 **AIM FOR** No universal CPL. It swings by trade, market, and channel. Aim for a cost **per sold job** that shrinks as the chain gets fixed. Fix booking before you buy more leads.

🔍 ASK THE CONTRACTOR

- "Where did your last 20 jobs come from?"
- "What do you spend a month on marketing, by channel?"
- "Which source brings the jobs you actually want?"
- "Are repeat customers and spam counted as new leads?"

📁 WHERE THE DATA LIVES

- **FSM:** job source and campaign fields (ServiceTitan, Housecall Pro, Jobber, etc.)
- **Phone system:** tracking numbers per source, call logs
- **HighLevel:** contact source, attribution, opportunities by source

💧 COMMON LEAKS

- No source tracking, so the loudest channel gets the credit
- Spam, vendors, and existing customers inflating the count
- One phone number on the truck, the site, and every ad
- Buying more leads to cover a booking leak

⚡ INSTALL IN HIGHLEVEL

- **Tracking numbers + UTMs** — every lead gets a source and a cost
- **One inbox** — calls, texts, forms, and chats in Conversations
- **Required lead source** — on every opportunity, no exceptions
- **Reactivation** — past customers and old estimates: leads they already paid for

🔍 TRACK THE BASELINE

Pull the last 90 days of leads and spend, by source. If they can't, that's your first finding. Start tracking this week.

2

THE FRONT OFFICE SCORECARD • KPI 2 OF 5

Answer Rate

Missed call. No answer. That homeowner just called the next company on the list. This is the first leak, and usually the biggest.

PLAIN DEFINITION

The share of inbound calls a live person or Voice AI actually picked up. For forms and chats, the share that got a real response. A call returned two hours later does **not** count. Neither does a caller who hung up waiting.

Answer Rate = answered calls ÷ inbound calls × 100

Unique callers in the period. Strip spam and robocalls first.

Abandoned Rate = hung up before answer ÷ inbound × 100

Ringling out, stuck on hold, lost in the phone tree. Track it on its own.

Missed Calls = inbound – answered

Break it out by hour and day. The pattern tells you where to aim.

🎯 **AIM FOR** Answered on the **first ring**, second at worst. Every call answered live by a person or Voice AI. Abandoned calls tracked and trending down.

🔍 ASK THE CONTRACTOR

- "What happens when the phone rings at 6:15pm? On a Saturday?"
- "How many rings before somebody picks up?"
- "How many calls did you miss last week? Do you know?"
- "Who calls missed calls back, and how fast?"

📁 WHERE THE DATA LIVES

- **Phone system:** call logs with status, ring time, abandoned calls
- **HighLevel:** call reporting, Conversations, missed-call alerts
- **FSM:** call logs, if the FSM has built-in phones

💧 COMMON LEAKS

- After hours, lunch hour, and weekends
- Two calls at once and one person
- Callbacks hours later, after they booked someone else
- A phone tree with too many options

⚡ INSTALL IN HIGHLEVEL

- **Voice AI** — answers 24/7 or as overflow, and books on the spot
- **Missed-call text back** — fires within seconds
- **Ring groups + routing** — so more than one phone rings
- **After-hours flow** — emergency triage and on-call alerts

🔍 TRACK THE BASELINE

Pull 2–4 weeks of call logs. Chart answered vs. missed vs. abandoned, by hour. Bring that chart to your next call. It does the selling for you.

3

THE FRONT OFFICE SCORECARD • KPI 3 OF 5

Booking Rate

They called. Somebody answered. Did they land on the schedule?
This is where a good CSR, or a well-built Voice AI, earns its keep.

PLAIN DEFINITION

Of the people who need a service you offer, in your area, how many got booked. Existing-job calls, wrong numbers, and vendors aren't opportunities. Track it two ways: **Answer Rate × Booking (of answered) = Booking (of all)**. That last one is the number owners usually quote.

Booking (of answered) = booked ÷ answered qualified leads

Isolates the CSR or Voice AI. The chain math uses this one.

Booking (of all) = booked ÷ ALL qualified leads

Same as Answer × Booking (of answered). Example: 70% × 50% = 35%.

Unbooked = answered qualified – booked

Every one belongs in a follow-up sequence.

🎯 **AIM FOR** Strong shops commonly aim for about **70% of all qualified leads** booked as a floor before buying more leads; **85–90%** is elite. Directional only. Their baseline is the real starting line.

🔍 ASK THE CONTRACTOR

- "Of every real lead last week, how many got on the schedule?"
- "What does your team say when someone asks 'how much?'"
- "Do you record calls? Who listens?"
- "What happens to the 'let me think about it' callers?"

📁 WHERE THE DATA LIVES

- **FSM:** jobs created vs. calls handled
- **Phone system:** recordings and dispositions, per CSR
- **HighLevel:** calendar bookings, stage changes, transcripts

💧 COMMON LEAKS

- 'How much?' answered with a number and no value
- Nobody asks for the appointment
- The CSR can't see real availability
- Unbooked callers never get a follow-up

⚡ INSTALL IN HIGHLEVEL

- **CSR booking script** — plus call scoring, per CSR (p. 28)
- **Voice AI booking** — straight into the calendar (p. 29)
- **Speed-to-lead workflow** — for forms and ad leads (p. 30)
- **CSR scorecard** — booking rate per person, weekly

🔍 TRACK THE BASELINE

Listen to 20 recorded calls with the owner. Mark booked or not, and why. Owners rarely forget the first time they hear their own calls.



THE FRONT OFFICE SCORECARD • KPI 4 OF 5

Show Rate

Booked isn't money. A truck that rolls to an empty house costs fuel, a tech's hour, and a slot you could have filled.

PLAIN DEFINITION

Of the appointments booked, how many actually ran: the tech got there, the homeowner was home, the visit happened. Some shops call it the "ran" rate. Cancels and no-shows count against it. Rescheduled and then run counts as run.

**Show Rate = appointments
run ÷ booked × 100**

Same period. Track cancels and no-shows separately.

Lost Slots = booked - run

Each one is a slot nobody else could book.

🎯 **AIM FOR** No outside number here. Set the target from their baseline, a few points at a time, and watch the split by how far out the job was booked.

🔍 ASK THE CONTRACTOR

- "How many times last month did a tech drive out and nobody was home?"
- "Do you confirm appointments? How, and when?"
- "Does the customer know the tech's name and arrival window?"
- "When someone cancels, does anyone try to rebook them?"

📁 WHERE THE DATA LIVES

- **FSM:** job status: canceled, no-show, completed
- **HighLevel:** appointment status: confirmed, showed, no-show
- **Phone system:** cancel and reschedule call volume

💧 COMMON LEAKS

- Booked too far out, with no touch in between
- No confirmation, no reminder
- A wide window and no 'on my way'
- A cancel treated as dead instead of a rebook

⚡ INSTALL IN HIGHLEVEL

- **Instant confirmation** — text right after booking
- **Reminders** — day before and morning of, inside 9am-8pm
- **Reply to confirm** — 'C to confirm, R to reschedule'
- **Cancel / no-show rebook** — workflow that offers two new times

🔍 TRACK THE BASELINE

Count booked vs. run for the last 30 days, straight from the FSM. Split it by how far out the job was booked. That alone often shows the leak.

5

THE FRONT OFFICE SCORECARD • KPI 5 OF 5

Conversion Rate

The tech is in the house. Did it turn into a sold job? Most of the money isn't lost at the kitchen table. It's lost in the follow-up that never happens.

PLAIN DEFINITION

Of the appointments that ran, how many became a sold job. Some shops call it close rate. Track service calls and estimate or replacement calls **separately**, and track it **per tech**. Count jobs first, then dollars.

Conversion Rate = sold jobs ÷ appointments run × 100

By job type and by tech. Also called close rate.

Dollar Conversion = \$ sold ÷ \$ quoted × 100

Shows whether the big tickets are the ones slipping.

🎯 **AIM FOR** Beat their own baseline, by tech and job type. The gap between their best tech and their average tech is usually the target.

ASK THE CONTRACTOR

- "When your guys give an estimate, how many say yes that day?"
- "Who follows up on open estimates, and how many times?"
- "Do you present options, or one price?"
- "Who runs your biggest opportunities?"

WHERE THE DATA LIVES

- **FSM:** estimates sold vs. open, by tech and job type
- **HighLevel:** pipeline (open, won, lost) and lost reasons
- **Accounting:** sold revenue by month

COMMON LEAKS

- Unsold estimates die in a drawer
- One option, one price, take it or leave it
- Financing never mentioned
- The newest tech sent to the biggest job

INSTALL IN HIGHLEVEL

- **3 options, best first** — present the best option, then step down
- **Unsold-estimate follow-up** — 30+ days of texts and emails: objections, warranty, financing
- **Second-look call task** — a real person calls every open estimate
- **Lost-reason tracking** — so you know what to fix next

TRACK THE BASELINE

Pull every open estimate from the last 90 days. Add up the dollars. That pile is usually the fastest win you can show an owner.



BONUS KPI

Average Ticket, Two Ways

Same number of jobs, more value per job. Strong operators watch this two ways, because each one tells a different story.

PLAIN DEFINITION

Average Sold Ticket is what a yes is worth.

Opportunity Average counts the zeros: every appointment run, sold or not. One shows how well you sell the job. The other shows what every truck roll is worth.

Average Sold Ticket = revenue ÷ sold jobs

By job type. The chain math uses this one.

Opportunity Average = revenue ÷ ALL appointments run

Zeros included. Example: \$14,000 ÷ 28 run = \$500, vs. a \$1,000 sold ticket.

Why not both in the chain?

Opportunity Average already has conversion baked in. Multiply it by conversion and you count conversion twice.

🎯 **AIM FOR** Watch both numbers move together. Sold ticket up while Opportunity Average stays flat usually means conversion slipped.

🔍 ASK THE CONTRACTOR

- "What's your average ticket on a service call vs. an install?"
- "What's every appointment worth, counting the ones that didn't buy?"
- "Do techs present options every time?"
- "When do you discount, and what do you get back?"

📁 WHERE THE DATA LIVES

- **FSM:** revenue by job type and tech, membership counts
- **Accounting:** revenue and job counts by month
- **HighLevel:** opportunity values, invoices if used

💧 COMMON LEAKS

- One-option quoting
- Discounting for nothing in return
- No membership, or one nobody sells
- Members who hear from you once a year

⚡ INSTALL IN HIGHLEVEL

- **Give-back offers** — discount only for a review, referral, or yard sign
- **Membership enrollment** — campaign to recent customers
- **Monthly member value touch** — so members feel the value
- **Renewal reminders** — so members don't quietly lapse

🔍 TRACK THE BASELINE

Get both averages by job type for the last 6–12 months. Note seasonality before you claim anything moved.

THE KPI CHAIN • THE MATH

Small lifts stack

Every rate multiplies the one after it. You don't need one miracle. You need a few small, real lifts in a row. Show this math with **their** numbers, not these.

||| EXAMPLE NUMBERS ONLY

Made-up round numbers that show how the math works. Not benchmarks, not typical results, not a prediction for any business.

STEP (EXAMPLE)	BEFORE	RESULT	AFTER +5 PTS	RESULT
Leads	100	100 leads	100 (no change)	100 leads
Answer Rate	70%	70 answered	75%	75 answered
Booking Rate of answered	50%	35 booked	55%	41.3 booked
Show Rate	80%	28 run	85%	35.1 run
Conversion Rate	50%	14 sold	55%	19.3 sold
Average Sold Ticket	\$1,000	\$14,000	\$1,000 (no change)	\$19,284

WHY 1 TO 10 POINTS MATTERS

MOVED	BOOKING ONLY	ALL 4 RATES
+1 pt	\$280	\$958
+3 pts	\$840	\$3,020
+5 pts	\$1,400	\$5,284
+10 pts	\$2,800	\$11,920

Example monthly revenue lift, same made-up shop. Not a benchmark, not a prediction.

What happened. Four rates, five points each. Leads and ticket didn't move. Because the rates multiply, sold jobs went from 14 to about 19 in this example.

Booking, two ways. Of answered: 50%. Of all leads: $70\% \times 50\% = 35\%$. After: $75\% \times 55\% = 41\%$. The second number is what owners quote.

Why sold ticket. Opportunity Average ($\$14,000 \div 28 \text{ run} = \$500$) already includes conversion. Use it after conversion and you count conversion twice.

The cost of the gap: missed calls EXAMPLE

30 missed × 50% booked × 80% show × 50% conversion = 6 jobs × \$1,000 = \$6,000 a month at risk

Same example shop: 100 leads, 70% answered, so 30 callers reached no one. Some call back, some were never going to buy. Call it "at risk" and let the owner adjust it. Their math, not yours.



Your move. Open the Missed Call & KPI Calculator. Put in their real numbers, pick how many points to test, and let them change the inputs. When they own the numbers, they own the problem.

ADD IT UP

Build the marketing budget backwards

Most owners set a budget by gut, or by whatever the ad rep said.
Flip it. Start with the revenue goal and walk the chain backwards.
Every point you fix shows up as leads they don't have to buy.

Leads needed = Revenue goal ÷ Avg Sold Ticket ÷ Conversion ÷ Show ÷ Booking (of all)

Booking (of all) = Answer Rate × Booking (of answered). Napkin version: goal ÷ ticket ÷ conversion ÷ booking. Keep show rate in when you have it. It keeps you honest.

Marketing budget = Leads needed × Cost Per Lead

Use CPL by source if you have it. A blended CPL is fine for the first pass.

||| EXAMPLE NUMBERS ONLY

Same made-up shop as the KPI Chain page. A \$20,000 monthly revenue goal and a \$60 cost per lead. Not a benchmark or a prediction.

WALK IT BACK (EXAMPLE)	TODAY'S TRUTH	AFTER +5 PTS ON EACH RATE
Revenue goal per month	\$20,000	\$20,000
÷ Avg Sold Ticket (\$1,000) = sold jobs	20	20
÷ Conversion = appointments run	÷ 50% = 40	÷ 55% = 36.4
÷ Show = appointments booked	÷ 80% = 50	÷ 85% = 42.8
÷ Booking of all leads = leads needed	÷ 35% (70% × 50%) = 143	÷ 41.25% (75% × 55%) = 104
× CPL (\$60) = marketing budget	\$8,571 / mo	\$6,223 / mo

Fix the leak before you buy more leads.

RYAN FISHER

Same goal, about 39 fewer leads a month to buy in this example.
If booking of all leads is well under ~70%, more leads mostly means more leak.

🗨 SAY IT LIKE THIS

“Tell me the number you want to hit. Let's walk it back with your numbers and see what it really takes. Then let's see what happens to that budget if we tighten up the phones first.”

The Calculator's Budget Planner does this math for you. Ticket, rates, and CPL come straight from the Today's Truth worksheet.



PART 4

The Plays

The front office gets them on the schedule. What happens in the home, and in the shop, decides if they come back, refer, and review.

“Numbers only move when people do.”

RYAN FISHER

QUALITY & REPUTATION

p. 24

PEOPLE, PAY & CAPACITY

p. 25

OPERATOR PLAYS • 1 OF 2

Quality & reputation

These are the plays that make you the agency they can't run without.

⚠️ Callback rate

Callback Rate = $\frac{\text{callback visits}}{\text{completed jobs}} \times 100$

Per tech, per job type. Every callback is a free truck roll and a customer who's already annoyed.

- Tag every callback in the FSM and HighLevel so you can count it.
- Run callbacks first thing. The upset customer goes to the front of the line.
- Put it on the tech scorecard. A high ticket with a high callback rate isn't a win.

★ Reviews that name the tech

People don't review companies. They review the person who showed up at their house. Build it that way.

- Send the review request after every job, with the tech's name in it.
- Include the tech's photo. It makes it personal.
- Count reviews per tech on the weekly scorecard.

“Hi [first name], thanks for having [Tech] out today. If [Tech] took good care of you, would you mention them by name in a quick review? [link]”

🔗 The bad-review plan

A 1-star review is a cost, not just a feeling. Build the plan before you need it.

1 Alert	2 Call	3 Reply	4 Fix	5 Learn
A low rating triggers an instant alert to the owner or manager.	A real person calls the customer the same day. Listen first.	Short public reply: thank them, own it, take it offline.	Make it right where it's fair. Log the root cause.	Review it weekly. Coach the process, not just the person.

“Thanks for telling us, [first name]. This isn't the experience we want for anyone. [Owner] is reaching out to you directly today to make it right.”

📅 The monthly member value touch

Members who only hear from you at renewal start wondering what they're paying for. Send something useful every month: a seasonal tip, a reminder of their perks, a heads-up before busy season, a member-only slot. Perceived value keeps members, even in months they don't use you.

⚡ INSTALL IN HIGHLEVEL

- **Callback tag + report**, per tech
- **Review request** with the tech's name and photo
- **Low-rating alert** workflow + owner task
- **Member nurture** drip, one touch a month

OPERATOR PLAYS • 2 OF 2

People, pay & capacity

Tie the scorecard to how people get paid. Plan the trucks from the numbers. Put the right person on the right job.

Scorecards tied to pay

What gets measured and paid on gets done. Build a simple scorecard per role in a HighLevel dashboard and review it weekly. The owner decides the pay plan. You make the numbers visible.

ROLE	SCORECARD NUMBERS	WHERE IT COMES FROM
CSR	Booking rate per person, reviews that mention them, calls answered	Call dispositions, recordings, calendar
Tech	Conversion rate, sold ticket, callback rate, reviews naming them, financing offered	FSM by tech, review tags, callback tags
Office mgr.	Show rate, open estimates followed up, member renewals	Appointment status, pipeline, memberships

Revenue per tech & capacity

Revenue per Tech = field revenue ÷ field techs

Monthly and trailing 12. Know the shop's own number. It changes by trade.

Capacity = techs × jobs per tech per day × work days

Compare it to booked appointments. Near full? Plan the next hire before you buy more leads.

Best closer on the biggest jobs

Not every opportunity is equal. When a replacement or big-ticket estimate books, the best closer for that job type should be the one walking in.

- Tag big opportunities at booking: system age, job type, size.
- Route them to the top converter on the board.
- Put newer techs on smaller calls, or on ride-alongs.

Second-look calls

Automation keeps every open estimate warm: objections, warranty, financing, at least monthly. But a real person still calls. Create a call task for every unsold estimate at day 2 and day 14.

“ Any questions I can answer? Want me to walk you through the options again? ”

The weekly numbers review

15 minutes, same day every week. Not monthly. By the time a monthly report shows a leak, it's been leaking for weeks.

1. Scorecard: this week vs. last week vs. baseline.
2. One win. One leak.
3. One action, one owner, one due date.

PART 5

The Call & The Build

How you run the first call, the scripts that book the job, and the HighLevel builds that keep every lead from slipping.

“Don’t automate chaos. The button comes last.”

RYAN FISHER

TRADES

p. 27

CSR SCRIPT

p. 28

VOICE AI PROMPT

p. 29

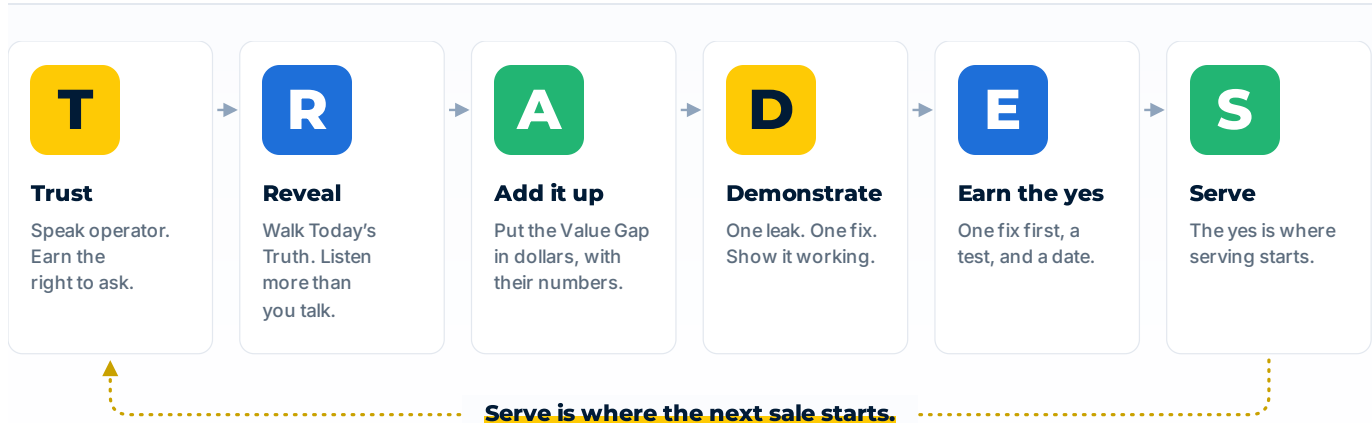
SPEED-TO-LEAD

p. 30

GFT MODEL 05 • THE FIRST CALL

The TRADES First Call

GOAL OF CALL ONE: FIND THE GAP AND EARN A NEXT STEP. NOT TO CLOSE.



GFT MODEL 05 / THE TRADES FIRST CALL

CRACK THE CONTRACTOR CODE

T Trust Speak operator Earn the right to ask questions in the first two minutes. No deck. No demo yet.	“ Before I show you anything: I’m not here to pitch software. I want to understand how your business really runs today. Cool if I ask a few questions? Ask / do: How many trucks? What’s busy season like? Who answers the phone?
R Reveal Today’s Truth Walk the worksheet. Listen more than you talk. “I don’t know” is a finding.	“ Roughly how many leads a month, and what do you spend? How many get answered live? Of those, how many book? Show? Buy? What’s a typical ticket? Ask / do: Then: “Which one of those keeps you up at night?”
A Add it up The Value Gap in dollars Turn the leak into dollars with their numbers. Walk the budget back from their goal.	“ You miss about [X] calls a month. If those booked, showed, and bought like the rest, that’s about [\$] a month at risk. Sound right? Ask / do: If they push back, let them adjust it. Their math beats yours.
D Demonstrate One fix One leak, one fix. Show it working live, on their phone if you can.	“ Call this number and let it ring out. (missed-call text back) Or: call this line and try to book a job. (Voice AI) Ask / do: Tie it back: “That’s the gap we just added up. That’s how we start closing it.”
E Earn the yes The Next Level Keep it simple: the one fix first, how we test it, when we check.	“ Here’s what I’d fix first. We lock in your baseline now, test it, and look at it together every week. Want to get started? Ask / do: “I need to think about it.” → “Totally fair. What do you want to think through?” Set a date.
S Serve Selling → serving The yes is where serving starts. Audit, test, install, report in their numbers.	“ Here’s your baseline. Here’s this week. Here’s the next leak I want to go after. Ask / do: Weekly numbers review, monthly Next Level review. Owners stay when they see their numbers move.

SCRIPT • TRADE-AGNOSTIC

The CSR booking script

Hand this to whoever answers the phone. HVAC, plumbing, electrical, roofing, garage doors: swap the bracketed parts. The Voice AI prompt on the next page follows the same flow, so the person and the AI sound like one company.

1 Greet: first ring, second at worst

“ Thanks for calling [Company], this is [Name]. Who do I have the pleasure of speaking with?

Get their name early and use it.

2 Empathize and own it

“ Sorry you’re dealing with that, [first name]. You called the right place. Let’s get someone out to you.

3 Discover

“ What’s going on? How long has it been happening? Have we been out to your home before?

Safety first. Gas smell, smoke, sparks, flooding near power: follow the company’s emergency policy, including telling them to call 911 or their utility right away.

4 Collect the details

“ Full name • best mobile number • service address • gate code, pets, parking • email

Read the number and address back. Bad data kills show rate.

5 Offer two times

“ I’ve got [day] between [window] or [day] between [window]. Which works better for you?

Two choices. Never ‘when’s good for you?’

6 Handle ‘how much?’

“ Great question. Every home’s different, so the tech looks at it first. There’s a [diagnostic/trip fee] for the visit, and you’ll get options and the exact price before any work starts. Want me to grab that [day] slot for you?

Don’t compete on price. Answer, add value, ask for the booking again.

7 Confirm and set expectations

“ You’re set for [day, window] at [address]. You’ll get a text confirmation, a reminder, and a heads-up with your tech’s name when they’re on the way. Is this mobile number okay for texts?

That last question is your text consent. Log the answer.

8 Close

“ Anything else I can help with today? Thanks for choosing [Company], [first name].

Log the disposition: booked, unbooked, not a lead. It feeds the CSR scorecard.

IF THEY WON’T BOOK

“No problem at all. Can I text you our info so you have it handy? I’ll check back tomorrow.” Then tag them **unbooked** so the follow-up workflow picks them up.

THREE HOUSE RULES

- Always ask for the appointment. Twice if needed.
- Never end with “give us a call back.”
- Every call gets a disposition. Every time.

PROMPT • MATCHES THE CSR SCRIPT

The Voice AI booking prompt

Paste this into your HighLevel Voice AI agent's prompt and fill in every `{{placeholder}}`. Same flow as the CSR script, so the AI and the office sound like one company.

ROLE

You are `{{agent_name}}`, the virtual front desk for `{{company_name}}`, a home service company serving `{{service_area}}`. You answer calls, help callers, and book appointments on the calendar. You are warm, calm, and brief, like the best CSR the company has ever had. If asked, say you are the company's virtual assistant. Never claim to be a human.

GOAL

Book a qualified appointment on every call where the caller needs a service we offer, in our service area. If you can't book, capture their details and create a follow-up task.

WHAT WE DO

Services: `{{services_list}}`
 We do NOT offer: `{{services_not_offered}}`
 Service area: `{{zip_codes_or_towns}}`
 Hours: `{{business_hours}}` After-hours policy: `{{after_hours_policy}}`
 Visit fee policy: `{{diagnostic_or_trip_fee_policy}}` Financing: `{{financing_yes_no_details}}`

CALL FLOW

1. Greet: "Thanks for calling `{{company_name}}`, this is `{{agent_name}}`. How can I help?"
2. Let them explain. Ask one question at a time. Use their first name once you have it.
3. Safety check: if the caller mentions a gas smell, smoke, sparks, flooding near electrical, or anyone in danger, tell them to get to safety and call 911 or their utility's emergency line now. Then alert on-call via `{{escalation_method}}`.
4. Confirm the address is in our service area. If not, apologize and end politely.
5. Collect: first and last name, mobile number, service address, a short description of the problem, how urgent it is, and whether they're a new or existing customer. Read the number and address back.
6. Check the calendar and offer two available times. Book the one they choose.
7. If asked about price, say: "`{{pricing_script}}`" Then offer the booking again.
8. Confirm the booking. Ask: "Is it okay if we text this number with your confirmation and updates?" Record yes or no.
9. Close: tell them what happens next (confirmation text, reminder, tech heads-up).

RULES

- Never invent prices, discounts, warranties, arrival times, or promises not written above.
- If you don't know, say a team member will follow up, and create a task with the details.
- If the caller asks for a person or is upset: transfer to `{{transfer_number}}` during business hours; after hours, take a message and flag it urgent.
- Keep each reply to one or two short sentences. Don't talk over the caller.
- Never take payment card details by phone.
- Vendors, sales calls, and job seekers: take a message and end the call politely.
- Existing job questions: take the details and create a task for the office.

BEFORE GO-LIVE

Connect the agent to the real calendar. Turn on recordings and transcripts. Set the transfer number.

TEST IT HARD

Make 10+ test calls: emergency, price shopper, out of area, angry caller, existing job. Fix the prompt after each one.

CHECK THE RULES

Call recording and AI disclosure rules vary by state. Have the contractor confirm what applies to them.

HIGHLEVEL BUILD • 1 OF 2

Speed-to-Lead workflow blueprint

The rule is simple: **zero wait on the first touch**. The lead that hears back first usually gets the shot. HighLevel updates its builder often, so menu names may shift. The logic won't.

BEFORE YOU BUILD

- A2P / 10DLC registration done for the texting number.
- Calendar connected with **real** availability.
- Only text people who reached out or opted in. Forms say they'll get texts.
- Pipeline: New Lead → Contacted → Booked → Lost.

WORKFLOW SETTINGS

- **Allowed sending window:** 9:00 AM–8:00 PM, every day, in the contact's time zone where available.
- **Stop on response:** on.
- **Re-entry:** off, so nobody gets the sequence twice.

Workflow A • New lead (forms, ad leads, directory leads)

T Trigger — Form Submitted, Survey Submitted, Facebook/Instagram Lead Form, or Inbound Webhook for outside sources. Filter out active customers.

1 If/Else: DND or STOP on? Yes: end. No: continue.

2 Send SMS #1, immediately. No wait step.

“Hi {{contact.first_name}}, it's {{user.first_name}} with {{location.name}}. Got your request. When's a good time for a quick call today? Or grab a time here: [calendar link]. Reply STOP to opt out.

3 Create/Update Opportunity in New Lead, **assign user**, and send an **internal notification**: “New lead: name, phone, source. Call now.”

4 Call action — connects the assigned user, then dials the lead. Or route the first call to the Voice AI agent.

5 Wait 5 min → SMS #2 if no reply and no booking: “Want me to give you a ring, or is text easier?”

6 Follow-up cadence — a call attempt plus a text later on Day 1, then Day 2, 4, and 7. Short, human, one question each. Last one: “Should I close this out, or do you still want help?”

G Goal: Appointment Booked → move to Booked, exit, and hand off to the confirmation workflow.

⚡ THE HAND-OFF: CONFIRMATION & REMINDER WORKFLOW (PROTECTS SHOW RATE)

Instant confirmation

Date, window, address. Reply C to confirm, R to reschedule.

Day-before reminder

Inside 9am–8pm. “Still good for tomorrow?”

Morning-of + on my way

The tech's name and a heads-up when they roll.

Cancel / no-show

Rebook text with two new times, plus an office task.

HIGHLEVEL BUILD • 2 OF 2

Missed calls, exits & the timeline

Workflow B • Missed-call text back

- T Trigger** — Call Status: inbound call missed, no answer, or voicemail.
- 1 If/Else: DND or STOP on?** Yes: end, and alert the team instead.
- 2 Send SMS, immediately**

“ Hey, it’s {{location.name}}. Sorry we missed your call! What can we help you with? You can also book here: [calendar link]. Reply STOP to opt out.
- 3 Notify + task** — alert the CSR or owner with a callback task due in 5 minutes. Create the opportunity if it’s a new contact.

🕒 OUTSIDE 9AM–8PM?

The first text holds until 9:00 AM in the contact’s time zone. That’s exactly why Voice AI matters: when someone calls at 10pm, the AI answers live and books them. No text needed.

📞 REPEAT CALLERS

Add a filter or wait so the same number doesn’t get three texts for three quick missed calls. One text per contact every few hours is plenty.

Exit rules (both workflows)

EVENT	WHAT HAPPENS
Lead replies	Stop on response ends the sequence. A person, Voice AI, or Conversation AI picks up the conversation to book.
Appointment booked	Goal event: exit, move the opportunity to Booked, start confirmations and reminders.
Replies STOP / DND on	No more texts, ever, unless they opt back in. Check DND before every send step.
Marked Lost or Not a Lead	Exit and remove from every nurture sequence.

The first-touch timeline

LEAD IN 0:00	TEXT #1 0:00	TEAM ALERT 0:00	CALL 0:00–1:00	TEXT #2 +5 MIN	CADENCE DAY 1–7
-------------------------------	-------------------------------	----------------------------------	---------------------------------	---------------------------------	----------------------------------

Every text respects the 9am–8pm window. Outside it, the first touch goes out at 9:00 AM sharp.

06

PART 6

It's You

The tools are the same for everybody. The operator isn't. Seven codes decide whether you're the one who closes the Value Gap.

"It's not more features, more workflows, more AI. It's YOU."

RYAN FISHER

THE 7 HUMAN CODES

p. 33

SELF-CHECK

p. 34

YOUR SCORES

p. 35

GFT MODEL 03 • SELF-CHECK

The 7 Human Codes

No tool installs these, and every result depends on them.
Five minutes. Be honest. Nobody's grading this but you.



AT THE CORE

01 Identity Who you serve, what you fix, who you are.

THE DAILY FIVE

02 Discipline The boring work, on schedule, every week.

03 Fluency You speak contractor.

04 Thinking Diagnose before you prescribe.

05 Leadership Tell the truth. Set the next step.

06 Serving Their win before your invoice.

THE BOUNDARY

07 Resilience What holds when the pressure hits.

GFT MODEL 03 / THE 7 HUMAN CODES

CRACK THE CONTRACTOR CODE

☆ **AT THE CORE**

Identity. Everything else stacks on it.
Get this one clear first.

📅 **THE DAILY FIVE**

Discipline, Fluency, Thinking, Leadership, Serving. The habits that do the work every week.

🎯 **THE BOUNDARY**

Resilience. What holds when a deal dies or a client walks.

It's not more features, more workflows, more AI. It's YOU.

RYAN FISHER

HOW IT WORKS

14 statements, two per code (p. 34). Circle 1-5 for each, then total each pair and find your first move (p. 35).

THE 7 HUMAN CODES · SELF-CHECK

14 statements. Five minutes.

How to score: circle 1–5 for each statement. **1** = not me at all · **3** = sometimes · **5** = that's me, every week. Then total each pair on the next page.

1	IDENTITY	I can say who I serve and what I fix in one sentence, without saying "AI" or "automation."	1 2 3 4 5
2	IDENTITY	I see myself as an operator who helps contractors run better, not a vendor selling software.	1 2 3 4 5
3	DISCIPLINE	I prospect and follow up every week, even when I don't feel like it.	1 2 3 4 5
4	DISCIPLINE	I keep a weekly scorecard for my own agency, and I actually look at it.	1 2 3 4 5
5	FLUENCY	I can explain CPL, Answer, Booking, Show, and Conversion Rate, plus both average tickets, without notes.	1 2 3 4 5
6	FLUENCY	I'm comfortable talking trucks, techs, dispatch, and busy season with a contractor.	1 2 3 4 5
7	THINKING	I audit a client's numbers and calls before I build or add another tool.	1 2 3 4 5
8	THINKING	I make decisions from data, not from whatever's new this week.	1 2 3 4 5
9	LEADERSHIP	I tell clients the truth, even when it's not what they want to hear.	1 2 3 4 5
10	LEADERSHIP	Every call I run ends with a clear next step and a date.	1 2 3 4 5
11	SERVING	I review clients' numbers with them every week, without being asked.	1 2 3 4 5
12	SERVING	I'd make a recommendation that costs me money if it's right for the client.	1 2 3 4 5
13	RESILIENCE	When I lose a deal or a client, I review what happened and get back to work that same week.	1 2 3 4 5
14	RESILIENCE	I've kept going through at least one stretch where nothing seemed to work.	1 2 3 4 5

THE 7 HUMAN CODES • SCORING

Your scores & where to start

Total each pair. Each code scores 2–10. **Your lowest code is your own Value Gap, and the one to work on first.** Tie? Pick the one higher on the list. Everything stacks on Identity.

CODE	TOTAL	WHAT IT IS • YOUR FIRST MOVE
Identity Q 1 + 2	_____	<i>Who you serve, what you fix, who you are.</i> First move: Write your one-sentence “who I serve, what I fix” with zero tech words. Say it out loud until it sounds like you.
Discipline Q 3 + 4	_____	<i>The boring work, on schedule, every week.</i> First move: Block two prospecting hours this week and start your own weekly scorecard.
Fluency Q 5 + 6	_____	<i>You speak contractor.</i> First move: Reread pp. 14–22. Then explain each KPI out loud, without notes, to someone who’ll call you out.
Thinking Q 7 + 8	_____	<i>Diagnose before you prescribe.</i> First move: On your next client, fill in Today’s Truth before you touch a tool.
Leadership Q 9 + 10	_____	<i>Tell the truth. Set the next step.</i> First move: End every call this week with a next step and a date. Tell one client one hard truth, kindly.
Serving Q 11 + 12	_____	<i>Their win before your invoice.</i> First move: Start a 15-minute weekly numbers review with every client: baseline vs. now, in their numbers.
Resilience Q 13 + 14	_____	<i>What holds when the pressure hits.</i> First move: Do a 15-minute review of your last lost deal: what happened, what you’d change. Then make your next call.

9–10 • STRENGTH

Use it on purpose, and teach it to your team.

6–8 • INCONSISTENT

Pick one habit and practice it every day for 30 days.

2–5 • BOTTLENECK

Fix this before you buy another tool or course.

A self-reflection tool, not a test or an assessment. Retake it every quarter and watch which code moves.

THE CLOSE

Go execute.

You've got the models, the numbers, the math, the scripts, and the build. The next move is reps on a real contractor. Audit first. Then install. Then prove it in their KPIs.

THIS WEEK

- 1 Fill Today's Truth.**
One contractor. Real baseline numbers. No guessing.
- 2 Run the calculator.**
Yellow cells only. Walk the owner through their math live.
- 3 Pick one Install Now.**
Use the Install Order Grid. Skip the Chaos Zone.
- 4 Score yourself.**
14 statements. Your lowest code is your own Value Gap.

REMEMBER

It's not more features, more workflows, more AI. **It's YOU.**

Meet the contractor where they are. Hybrid with their tools. Prove the move in Answer, Booking, Show, Conversion, and ticket. Then stack the next install.



Ryan Fisher

Contractor · Operator

Access is not progress. Implementation is. Execution is what your clients feel.

RYAN FISHER · LET'S GO TO WORK

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