

Kept Straight

Operations Starter Bundle

Weekly Owner Routine - Blank template

Monday: Review schedule, confirm crew assignments

Tuesday: Send outstanding invoices

Wednesday: Follow up on estimates and quiet leads

Thursday: Order supplies, check equipment logs

Friday: Reconcile payments, plan next week

Monthly:

☐ Review income vs. expenses

☐ Ask happy customers for reviews

☐ Update templates and checklists

Kept Straight

Operations Starter Bundle

Weekly Owner Routine - Filled-in example

Monday: Reviewed schedule - Ray on Maple St job Tue-Thu

Tuesday: Sent invoices #1040-1042 (\$1,140 outstanding)

Wednesday: Followed up with 3 estimates - 1 accepted

Thursday: Ordered fittings, checked washer unit 2 log

Friday: Reconciled \$2,305 in payments, booked next week

Monthly:

[x] Review income vs. expenses - September: +\$1,870

[x] Ask happy customers for reviews - 2 sent

[] Update templates and checklists - planned 10/15

Hypothetical example showing how a customer might use this template.