

CONTRACTOR SCALER HUB · TOOLKIT

Plan Your Next Stage of Growth

The course's checklists, worksheets and templates in one file: 4 to print or fill in on your phone, and 1 spreadsheet sent with it.

MotionOps

How to use this toolkit

One file per lesson of **Plan Your Next Stage of Growth**, in the order of the course. Each starts with the lesson it belongs to and what to do with it. The tinted rows are the lessons' examples; your numbers go in the blank ones.

Use it lesson by lesson, or go straight to the one you need this week. Nothing here needs an account, and every file says when to check a number with an accountant, an attorney, your licensing board or an insurance agent.

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LESSON 1 · HOW TO GROW A CONSTRUCTION BUSINESS: FIND THE ONE CONSTRAINT HOLDING YOU BACK

Growth Constraint Worksheet

For lesson 1 of the course. Fill it in with your last 90 days of numbers, test your guess against counter-evidence, and finish with the one constraint you'll work on this quarter, in one sentence with its evidence.

1. Write down the symptoms

Everything you noticed in the last quarter: a late job, an angry customer, a tight month. For each symptom, write every cause that could explain it, one per constraint. Leave a cell empty when that constraint can't explain it.

Symptom	Could be demand	Could be sales	Could be delivery	Could be supervision	Could be cash	Could be owner
Example Revenue flat for six months	Fewer leads	Lower close rate	Crews full	No one to run more jobs	Turning down big jobs you can't fund	Owner is the estimator and is maxed out
Example Jobs finish late			Crews overbooked	Crew leads stretched across too many sites	Materials ordered late to save cash	Crew waits for owner answers
Example Margin falling	Discounting to win work	Weak scope on proposals	Overtime	Rework, poor handoffs		Change orders not priced because the owner is too busy

2. Check each constraint against your own numbers

Pull one or two numbers you already have for each constraint: the last 90 days, and the 90 days before if you can. **Numbers beat memory:** take them from the schedule and the books, not from the worst week you remember.

Constraint	The number to pull	Points to this constraint when	Last 90 days	90 days before
Demand	Qualified leads per month; weeks of signed work ahead	Backlog is short and shrinking, and qualified leads are down		
Sales	Close rate; days from site visit to proposal; proposals with no follow-up owner	Plenty of qualified leads, but proposals are slow or close rate is falling		
Delivery capacity	Crew-days available vs. crew-days billed; overtime hours	Crews are fully booked, overtime is high, and backlog is long		
Supervision	Jobs running at once vs. people who can lead a job; owner hours on site	Every added job needs the owner or the same one lead		
Cash	Weeks where projected cash goes below your floor; days from job completion to payment	A 13-week cash flow shows dips even in good months		
Owner decisions	Interruptions per day; decisions waiting on the owner at any moment	The interruption log is full of routine questions		

Example from the lesson (a made-up remodeler: 22 people, three crews, the owner is the estimator): leads and close rate steady; about 6 days from site visit to proposal, up from 3; 9 weeks of signed work ahead, up from 5; crews fully billed, with Saturday overtime most weeks; 2 crew leads, while the third crew calls the owner several times a day; the owner about 15 hours a week on site. Demand is not the problem. **The constraint is supervision.**

3. Look for counter-evidence

For the constraint you suspect, write what you would see if you were wrong, then check it. If you think it's demand but crews are booked eight weeks out, it isn't demand.

Constraint I suspect	What I'd see if I were wrong	What I found when I checked	Still the constraint?
Example Demand	Crews booked weeks out while leads hold steady	Leads steady; 9 weeks of signed work ahead	No

4. If the evidence points to more than one

Choose the one that, if fixed, would relieve the others. This order is a starting point, not a law:

1. **Owner decisions and supervision** usually come first, because every other fix needs the owner's time.
2. **Cash** comes next when it's real, because it limits every growth move that costs money up front.
3. **Delivery and sales** follow, and **demand** comes last. A company with a free owner and good crew leads but a dry pipeline really does need demand first.

Candidate constraint	Its evidence	If fixed, which others would it relieve?

5. Name your constraint

> EXAMPLE FROM THE LESSON
> Our constraint is supervision: the third crew needs the owner on site about 15 hours a week, and the backlog is up to nine weeks while leads are flat.

OUR CONSTRAINT IS _____: THE EVIDENCE, WITH ITS NUMBERS

COUNTER-EVIDENCE I CHECKED

DATE WRITTEN

If you can't write the evidence, you haven't found the constraint yet. Write what you still need to find out:

Next investigation: what to find out	The number or record to pull	Who	By when

6. Where to go next: tick your constraint and start with its lessons

- [ ] **Owner decisions:** the owner bottleneck lesson and the 30-day delegation plan
- [ ] **Delivery and handoffs:** the construction workflow and office-field coordination
- [ ] **Cash or margin:** budget vs. actual and the 13-week cash flow
- [ ] **Sales:** the construction sales process
- [ ] **Demand:** lead source tracking and how to get more leads
- [ ] **Supervision or people:** crew leader responsibilities and the org chart

What to review, and when

- [ ] A month from now (date: _____): is the evidence behind your constraint still true?
- [ ] Symptoms the constraint doesn't explain. If there are many, look again.

LESSON 2 · SPREADSHEET · EXPANSION-OPTIONS-MATRIX.XLSX

Expansion Options Matrix

Spreadsheet expansion-options-matrix.xlsx came with this toolkit. Open it in Excel, Numbers or Google Sheets (File > Import). Yellow cells are yours to type; gray cells calculate. This page says what is in it.

Crew-day capacity count, last 90 days

From lesson 2 of the course. The numbers are the lesson's made-up example: replace them with yours from the schedule or timesheets. The cheapest growth is the crew-days you already pay for but don't bill. Count them before you add a crew, then sort the gap by cause.

- Crew-days available and billed
- The gap, sorted by cause
- Check: every idle crew-day has a cause
- What recovering it is worth
- Compare: one more crew, its first quarter

Expansion options matrix

One row per option you're considering, including "fill current capacity". Fill in every column the same way: an option you can't fill in honestly isn't ready to choose. Write the assumption, not the hope. Cash out before cash in is a number, from your 13-week cash flow or the Cash gap tab, not a feeling.

- Your options, side by side
- Your choice

The cash gap for a new crew

The calculation from lesson 3, When to Add Another Crew: a new crew is paid every week from its first day, and its customers pay later. Made-up example: a three-person crew. Add the result to your 13-week cash flow for the new crew's first two months. If it drops below your floor, the answer is no, or the start has to be smaller. Decide the plan for late payments with your accountant.

- Cash out before cash in

LESSON 3 · WHEN TO ADD ANOTHER CREW: A READINESS CHECKLIST FOR GROWING CONTRACTORS

Next-Crew Readiness Checklist

For lesson 3 of the course. Answer every question yes, no or not sure, and write the evidence. "Not sure" counts as no until someone checks. There is no score: a single no in the wrong place is enough to wait.

1. Demand reliability

Question	Evidence to look at	Yes, no or not sure	What the evidence shows
Have the current crews been fully booked for at least the last two or three months, not just this month?	Crew-days billed vs. available, month by month		
Is the backlog of signed work long enough to keep another crew busy for its first months?	Weeks of signed work ahead		
Is that backlog the kind of work a new crew can do, not jobs only your best crew can handle?	Signed jobs by type		
Has the extra demand lasted through a slower season before?	Same months last year		

2. Supervision

Question	Evidence to look at	Yes, no or not sure	What the evidence shows
Is there a named person who will lead the new crew, and could they do it next month?	The crew leader readiness list		
If the lead comes from an existing crew, who leads that crew?	The org chart, with names		
Who does the new lead escalate to, and does that person have the hours?	Owner or operations lead's week		

3. Repeatable processes

Question	Evidence to look at	Yes, no or not sure	What the evidence shows
Is the handoff from sale to crew written down?	Job handoff checklist		
Does every crew use the same job checklist and daily report?	The last ten jobs' records		
Can the office schedule one more crew as easily as the crews you have now?	Who builds the schedule and how long it takes now		

4. Equipment

Question	Evidence to look at	Yes, no or not sure	What the evidence shows
Vehicle: bought, leased, or an existing one freed up?	A quote or a plan		
Tools and equipment the new crew needs, and which can be shared	A list, priced		
Insurance, licensing or bonding changes for another vehicle or more payroll	A call with your agent and accountant		

5. People

Question	Evidence to look at	Yes, no or not sure	What the evidence shows
Where will the crew members come from, and how long does hiring take for you?	Your last three hires		
Is there an onboarding plan with named trainers?	The 30-day plan		

6. Cash timing

Question	Evidence to look at	Yes, no or not sure	What the evidence shows
How much goes out before the new crew's first payment comes in?	The cash gap, below		
Does your 13-week cash flow stay above your floor with that added?	The forecast, with the new crew added		
What's the plan if the first jobs pay late?	A line of credit, or a smaller start, decided with your accountant		

7. The cash gap: count it before you hire

The new crew is paid every week from its first day. Its customers pay later: after a deposit, at progress milestones or at completion. A deposit at signing shortens the gap: count it as the first payment in line D. The same calculation is on the Cash gap tab of the Expansion Options Matrix.

Item	Example (made-up, three-person crew)	Your crew
A. Burdened labor cost per hour (wage plus taxes, insurance and benefits)	$38	
B. Hours per week, whole crew	120	
C. Weekly labor cost (A × B)	$4,560	
D. Weeks from first day to the first customer payment	5	
E. Labor paid before any customer payment (C × D)	$22,800	
F. Vehicle down payment, tools and setup	$9,000	
G. Materials bought before the first payment (widens the gap)	Not in the example	
Cash out before cash in (E + F + G)	**$31,800**	

- [ ] Added to the 13-week cash flow for the new crew's first two months
- [ ] The forecast stays above your floor. If it drops below, the answer is no, or the start has to be smaller
- [ ] Plan if the first jobs pay late, decided with your accountant: a line of credit or a smaller start

8. Summary, area by area

The tinted rows are the lesson's example: an electrical contractor with one crew of four, run by the owner. Demand and cash said go; supervision and process said not yet, so the second crew was delayed one quarter.

Area	Yes, no or not sure	What's missing
Example Demand	Yes	Backlog has held through the slower months
Example Supervision	No	The best electrician could lead, but has never run a job without the owner
Example Processes	No	Leads come in by phone and text to the owner; the schedule is in the owner's head
Example Equipment	Yes	A second van is priced
Example People	Not sure	No hire in two years; no idea how long it takes now
Example Cash	Yes	The forecast stays above the floor with the gap added
Demand		
Supervision		
Processes		
Equipment		
People		
Cash		

9. Open questions

For every no or not sure: the open question, the person who will answer it, and a date. This list is the real output of the checklist.

Open question	Area	Who answers	By when	Answer
Example How long does hiring take for us now?	People			

10. If the answer is not yet

"Not yet" doesn't mean turning work away. While you close the gaps:

- [ ] **Fill the current crews first,** with the capacity count from lesson 2
- [ ] **Raise prices or tighten the job mix,** which reduces the backlog without more crews
- [ ] **Use a trusted sub for overflow,** on jobs where you can check the quality
- [ ] **Test before you commit:** a smaller, time-limited version of the expansion (lesson 4)

DATE TO RUN THIS CHECKLIST AGAIN

WHO RUNS IT

What to review, and when

- [ ] The open questions: how many are answered, and which are still blocking
- [ ] Crew-days billed vs. available on the current crews, each month
- [ ] The cash forecast with the new crew added

LESSON 4 · TEST BEFORE YOU EXPAND: RUN A GROWTH PILOT WITHOUT LOSING CONTROL

Growth Experiment Brief

For lesson 4 of the course. Fill in one brief per pilot before it starts, and agree the decision rules with whoever runs it while you're still neutral. The examples are the lesson's service-area pilot.

1. The assumption you're testing

One sentence: what has to be true for the full expansion to work.

Example: "Homeowners in Millbrook and Ashford will book bathroom remodels at our prices, and we can deliver them there at a margin close to our home area."

OUR ASSUMPTION

2. The boundary

What's in the test and what isn't: place, job types, number of jobs, length.

Example: two towns; bathrooms only; up to six jobs; eight weeks of booking.

PLACE

JOB TYPES

NUMBER OF JOBS, AT MOST

LENGTH

3. The owner and the limits

One named person who runs the pilot and reports on it. If the business owner runs it, you've tested whether the owner can do it, not whether the business can.

Example: the estimator, not the owner, runs it. Marketing up to a set budget; one crew for up to two weeks a month; no new hires.

PILOT OWNER

REPORTS TO, AND HOW OFTEN

LIMIT: MONEY

LIMIT: CREW TIME

LIMIT: OFFICE TIME

LIMIT: NEW HIRES

4. Measures and targets

Four to six measures that test the assumption, each with a target set before the pilot. For a new service, watch estimate accuracy most: estimated vs. actual hours on every job.

Measure	Target	Result	Met?
Example Qualified leads	At least 12	15	Yes
Example Close rate	At least our home-area rate	About the same	Yes
Example Jobs completed	At least 4, at most 6	5	Yes
Example Gross margin vs. home area	No more than 3 points lower	6 points lower	No
Example Drive time per job day	Under 1 hour each way	About 1 hour 10 minutes	No
Example Callbacks	No more than at home	One, fixed the same week	Yes
Example Owner hours	Under 2 a week	About 1 a week	Yes

5. Decision rules, written before the first job

Write them while you're still neutral. Without them, every result looks encouraging to the person who wanted the expansion.

Decision	Example rule	Your rule
Expand: move to the full plan, starting with its readiness check	Every measure at or above its target	
Adjust: change the price, the job types or the boundary, and run one more round	Demand is there, but margin or drive time misses	
Stop: close it, keep what you learned, and go back to the options	Fewer than half the target leads	

AGREED WITH

DATE AGREED

6. Before the first job

- [ ] Licensing, permits and insurance checked for the new area or service with your insurance agent and the local licensing office. Rules can differ from one town or county to the next
- [ ] A tag set up for pilot clients and jobs, so their numbers stay separate from the rest of the business
- [ ] Decision rules agreed with whoever runs the pilot
- [ ] The pilot runs long enough for the first jobs to be completed, not only booked

7. Weekly check

Measures against targets, and whether the boundary is holding. One more job, one more town or a second crew "just for now" turns the pilot into an expansion nobody decided on.

Week	Measures vs. targets	Boundary holding?	Pilot jobs tagged?	Notes

8. The decision at the end

Example: margin 6 points lower and drive time about 1 hour 10 minutes each way, against targets of 3 points and under 1 hour. By the rules: **adjust.** Add a travel charge, book pilot jobs in blocks so a crew stays for consecutive days, and run eight more weeks.

RESULT AGAINST THE RULES

DECISION: EXPAND, ADJUST OR STOP

WHAT CHANGES FOR THE NEXT ROUND OR NEXT STEP

DATE

What to review, and when

- [ ] Each week: pilot measures against their targets, and whether the boundary is holding
- [ ] At the end: the result against the rules you agreed in advance, not against what you hoped

LESSON 5 · 90-DAY BUSINESS PLAN FOR CONTRACTORS: ONE GOAL, NAMED OWNERS AND WEEKLY REVIEWS

90–Day Business Plan Template

For lesson 5 of the course. One plan per quarter: the constraint, one objective, two or three measures, three milestones with their actions, and the reviews that keep it moving. The tinted rows are the lesson's remodeler example.

1. Header

QUARTER

PLAN OWNER

CONSTRAINT: ONE SENTENCE, WITH ITS EVIDENCE

OBJECTIVE AT DAY 90: ONE OBJECTIVE, MEASURABLE, TIED TO THE CONSTRAINT

Example: Constraint: supervision. The third crew can't run without the owner. **Objective:** by day 90, the third crew runs without the owner on site, and the owner's freed hours go into estimating.

2. Measures: two or three you can pull every month

Measure	Today	Target at day 90	Day 30	Day 60	Day 90
Example Owner hours on site per week	About 15	3 or fewer			
Example Owner calls from the third crew per day	Several	Escalations only, as defined in the decision limits			
Example Days from site visit to proposal	About 6	3			

3. Milestones and actions

Each milestone is a result, not an activity. Each action has one owner, a date and any dependency.

Milestone	Action	Owner	Due	Depends on	Status
Example Day 30: a lead is chosen and runs the crew with the owner on site	Choose the third crew's lead from the readiness list	Owner	Week 1		
Example	Write the lead's responsibilities and decision limits together	Owner and lead	Week 1	Lead chosen	
Example Day 60: the lead runs the crew with the owner on call	Owner leaves the site; reviews decisions in a weekly one-to-one	Owner	Week 7	A week of stage 2 with no decision the owner would have made differently	
Example Day 90: the lead owns the crew, and estimating is faster	Run the fourth-crew readiness check again	Owner and office coordinator	Week 12		
Day 30:					
Day 60:					
Day 90:					

4. Weekly review: five minutes in the team meeting

1. Read this week's actions from the plan: done, or a new date with a reason.
2. Anything blocked becomes an action in the meeting's log, with an owner.
3. Nothing else from the plan is discussed weekly.

5. Monthly review: 30 minutes at day 30 and day 60

With the owner and anyone who owns actions:

1. **Milestone:** reached, partly reached, or missed?
2. **Measures:** the numbers against their targets, pulled the same way every time.
3. **Constraint:** is it still the constraint? Measures moving and symptoms fading: keep going. Measures flat: find out why before adding actions.
4. **Course correction:** for anything off track, decide one of the three below, and write it in the review log.

Decision	When
Keep	On track, or behind for a reason that's already fixed
Change	The action isn't producing the milestone: change the action, the owner or the date, not the objective
Stop	The evidence says the constraint was wrong. Go back to lesson 1 with what you learned.

6. Review log

Put the day-30, day-60 and day-90 reviews in your calendar now, and write their dates in the first column.

Date	Milestone status	Measures	Decision (keep, change, stop)	What changed
Day 30: _____				
Day 60: _____				
Day 90: _____				

Don't change the objective mid-quarter. If it was wrong, finish the quarter's learning and pick a better one at day 90.

7. Day 90: what comes next

Hold the monthly review one more time, then answer:

DID THE OBJECTIVE HAPPEN? MEASURES AGAINST TARGETS, HONESTLY

WHAT'S THE CONSTRAINT NOW? FIXING ONE USUALLY REVEALS THE NEXT

WHAT GOES IN THE NEXT PLAN? ONE OBJECTIVE AGAIN, FROM THE NEW CONSTRAINT

What to review, and when

- [ ] Each week: this week's actions, done or re-dated
- [ ] Each month: milestones, measures, and whether the constraint is still the right one
- [ ] At day 90: the result, the new constraint and the next plan. Start the next quarter from the Growth Constraint Worksheet

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Back to the course

Every file in this toolkit follows a lesson of **Plan Your Next Stage of Growth** on the Contractor Scaler Hub: when a lesson's example changes, its file changes too. Reread the lesson when a file asks for a number you do not have yet.

All six courses: **motionops.com/scaler-hub**

Spreadsheets in this toolkit

- **Expansion Options Matrix**: expansion-options-matrix.xlsx

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