



OWEN



SADIE



MILO



ROSA



THEO

THE COMPLETE CATALOG

Your Crew

Six AI workers and 120 workflows they run for owner-run small businesses.

Browse, check the boxes, and bring it to your free call.



Check what you want



Circle your favorites

Bring it to your free call

Contents

Each section belongs to one member of your crew, and Nora leads them all. Featured workflows save the most clicks and keystrokes, so they get the most room. Every entry has a box to check. When you are done, upload the pages you checked at stabilsystems.com/business-plan.

#1

START HERE

Popular

The 16 workflows that give the most hours back, the least stress, and the most value.

page
3



HIGHLIGHTS

What your crew can do

Its own email, your business brain, your apps, leads, decks, and social.

page
6



WORKS WITH

The apps your business already uses

QuickBooks, Square, Shopify, HubSpot, Google, Microsoft, and more.

page
7



SECTION 1 · OWEN

Bookkeeping & cash flow

Owen keeps the books and the cash moving. 20 workflows.

page
8



SECTION 2 · SADIE

Leads, sales & customers

Sadie answers every lead and follows up. 20 workflows.

page
13



SECTION 3 · MILO

Marketing & reviews

Milo gets you found and keeps you looking good. 20 workflows.

page
18



SECTION 4 · ROSA

Front desk, inbox & scheduling

Rosa runs the front desk. 20 workflows.

page
23



SECTION 5 · THEO

Team, HR & admin

Theo keeps your team and your paperwork straight. 20 workflows.

page
28



SECTION 6 · NORA

Operations, jobs & orders

Nora leads the crew and keeps the work moving. 20 workflows.

page
33



AT THE BACK

Your next step

Send us your checked pages and book a free call.

page
38

START HERE

Popular

The workflows owners ask for first: the most hours back, the least stress, and the most value from week one. Check the ones you want; the full catalog starts on page 8.

#1

MORE SALES

☐ INCLUDE

Google Business

Text messages

Hi, do you install mini splits? Need a quote for 2 rooms

Yes we do! Is this for a home or business, and what zip code?

Home, 30062

Great. I can get a tech out Thursday at 10 or Friday at 2. Which works?

Answers every new lead in minutes

The first business to reply usually wins the job. Answering in minutes, even at 9 PM, is the biggest sales win most owners can make.

WHAT IT DOES

Replies to web forms, Google, Yelp, Thumbtack, and Facebook leads in minutes, day or night. Asks your qualifying questions and books the estimate or call on your calendar.

OFF YOUR PLATE

Answering, qualifying, and booking every lead.



No. 2.01 · Sadie, Leads, sales & customers

#2

CASH IN

☐ INCLUDE

QuickBooks

Spreadsheet

Waits for your OK

Overdue, oldest first

Customer	Invoice	Days	Next step
Harbor De...	\$2,400	47	Call owner
Mill St Ba...	\$860	31	2nd remin...
R. Okafor	\$395	12	Reminder ...
Lakeview ...	\$1,150	9	Promised ...

Get paid faster

The fastest money in any small business is the money already owed to you. Polite, steady follow-up collects most of it.

WHAT IT DOES

Works your overdue list every week: friendly reminders, then firmer ones, on a schedule you set. Logs every promise to pay and tells you which accounts need a call from you.

OFF YOUR PLATE

Chasing every overdue invoice by hand.



No. 1.01 · Owen, Bookkeeping & cash flow

#3

HOURS BACK

☐ INCLUDE

Outlook

Mail

Rosa

31

From

rosa@lakesidelandscapin...

Info

12

To

Dana Whitfield

Sales

7

Owner

4

Hi Dana! Yes, we can do Thursday ...

Answered 31 emails today · 5 sent to t...

Its own email address

Most owners lose two hours a day to email. This gives them back.

WHAT IT DOES

Your worker gets its own address, like rosa@yourbusiness.com. Customers can email it, and it answers, books, files, and follows up in your voice. With permission it also works inside info@ and your own inbox.

OFF YOUR PLATE

Reading, answering, and filing email.



No. 4.01 · Rosa, Front desk, inbox & scheduling

#4

MORE SALES

☐ INCLUDE

WhatsApp

Text messages

Sorry we missed your call! This is Lakeside Landscaping. What can we help with?

Need a quote on fall cleanup

Happy to. I can have someone out Thursday at 3 or Friday at 10. Which works?

Missed-call text back

A missed call is usually a customer calling the next business. A text back within a minute keeps the conversation yours.



No. 4.20 · Rosa, Front desk, inbox & scheduling

#5

FOUND MORE

☐ INCLUDE

Google Business

Inbox

Waits for your OK

★★★★ Jordan P.
"Fast, clean, fair price"

★★★★ Ana R.
"Best haircut in town"

★★★★ Mike T.
"Late, but good work"

Requests sent
18 this week

Replied

Replied

Sent to you

6 new reviews

Review requests and replies

Reviews decide who gets the call. Steady asking turns happy customers into your best marketing.



No. 3.01 · Milo, Marketing & reviews

#6

HOURS BACK

☐ INCLUDE

QuickBooks

Checklist

September reconciliation

☒ Checking: 412 lines matched

☒ Business card: 96 lines matched

☐ 3 charges need a receipt

☐ Your sign-off

Bank and card reconciliation

Clean books every week means you always know where you stand, and your accountant bills you less.



No. 1.13 · Owen, Bookkeeping & cash flow

#7

MORE SALES

☐ INCLUDE

QuickBooks Spreadsheet Waits for your OK

Estimate #2207 · Chen kitchen

Item	Qty	Price
Cabinet install	14	\$4,900
Quartz counters	42 sq ft	\$3,780
Plumbing hookup	1	\$650
Total, better opti...		\$9,330

Quotes and estimates

Same-day quotes win more jobs. This turns your notes into a finished quote in minutes.

WHAT IT DOES

Builds clean quotes and estimates from your price list, site notes, and photos, with options at good, better, and best. Ready for you to check and send the same day.

OFF YOUR PLATE

Measuring, pricing, and writing every quote.



No. 2.13 · Sadie, Leads, sales & customers

#8

HOURS BACK

☐ INCLUDE

Google Calendar Calendar

Bookings this week

Mon	Tue	Wed	Thu	Fri
Okafor	Chen	Patel		Ruiz
	Brennan		Harbor	

Online booking and rescheduling

Customers book when it suits them, and your calendar fills without phone tag.

WHAT IT DOES

Books, moves, and cancels appointments by email, text, and chat, right on your calendar, with your rules for job length, travel, and buffers.

OFF YOUR PLATE

Booking, moving, and confirming every appointment.



No. 4.13 · Rosa, Front desk, inbox & scheduling

#9

LESS STRESS

☐ INCLUDE

Google Calendar Task schedule

Today's routes

8:00 AM	Okafor: furnace tune-up	Luis	Confirmed
10:30 AM	Harbor Dental: AC service	Kim	On the way
1:00 PM	Chen: kitchen rough-in	Tara	Parts ready

Job runs long? It moves the next one and texts the customer.

Dispatch and job scheduling

Dispatch is the daily fire drill in a service business. This keeps the day running when plans change.

WHAT IT DOES

Builds each day's jobs around location, skills, and parts, sends techs their routes and details, and reshuffles when a job runs long or someone calls out.

OFF YOUR PLATE

Planning routes and juggling the schedule.



No. 6.01 · Nora, Operations, jobs & orders

#10

CASH IN

☐ INCLUDE

Google Calendar Text messages

Reminder: your cleaning is tomorrow at 9 AM. Reply C to confirm or R to reschedule.

R

No problem. I have Thursday at 9 or Friday at 1. Which works?

Appointment reminders and no-show follow-up

A reminder with an easy way to reschedule turns a no-show into a moved appointment, and the open slot goes to someone on the waitlist.

WHAT IT DOES

Sends reminders, confirms, and handles reschedules. When someone no-shows, it reaches out the same day to rebook.

OFF YOUR PLATE

Reminding, confirming, and rebooking.



No. 4.07 · Rosa, Front desk, inbox & scheduling

#11

CASH IN

☐ INCLUDE

QuickBooks Record Waits for your OK

Invoice #1048 Ready to send

Customer	Dana Whitfield
Job	Water heater swap
Total	\$1,865.00

Invoice from finished jobs

Every day an invoice waits is a day added to when you get paid. This closes the gap to same day.

WHAT IT DOES

When a job or order is marked done, it drafts the invoice from the quote, the hours, and the materials, then sends it once you approve.

OFF YOUR PLATE

Turning finished work into invoices.



No. 1.02 · Owen, Bookkeeping & cash flow

#12

FOUND MORE

☐ INCLUDE

Canva Social graphics

TIP: Change your filter every 90 days	THIS WEEK Fall tune-up special	MEET THE TEAM Luis, 12 years with us
--	---------------------------------------	---

Scheduled Mon, Wed, Fri · Instagram, Facebook, Nextdoor

Social graphics and posts

Steady, good-looking posts keep you top of mind without you thinking about it.

WHAT IT DOES

Designs a week of on-brand posts from your jobs, products, offers, and tips, writes the captions, and schedules them all.

OFF YOUR PLATE

Designing, writing, and scheduling every post.



No. 3.13 · Milo, Marketing & reviews

#13

MORE SALES

☐ INCLUDE

Google Calendar Calendar Waits for your OK

Quote follow-ups

Mon	Tue	Wed	Thu	Fri
Day 2				
	Call			
			FAQ	
		Day 7		
				Last

Follow up on open quotes

Most quotes are won on the second or third touch. This makes sure every one gets them.

WHAT IT DOES

Follows up on every open quote on a schedule: a check-in, an answer to common questions, and a last call, until each one is a yes or a no.

OFF YOUR PLATE

Remembering and writing every follow-up.

☐ ☐ ☐ No. 2.08 · Sadie, Leads, sales & customers

#14

LESS STRESS

☐ INCLUDE

Gmail Inbox Waits for your OK

- Lead tech posting
47 applicants Live
- Strong fit
6 people Interviews booked
- Maybe
11 people For you to review
- Not a fit
30 people Thank-you sent

Hiring from post to interview

Hiring is one of the biggest time sinks for owners. This handles everything up to the conversation.

WHAT IT DOES

Writes the job post, posts it to Indeed and your site, screens every applicant against your must-haves, and books interviews with the best ones.

OFF YOUR PLATE

Posting, screening, and scheduling.

☐ ☐ ☐ No. 5.01 · Theo, Team, HR & admin

#15

HOURS BACK

☐ INCLUDE

Google Drive Weekly routine

Every Friday · 3:00 PM Routine on

Receipts / Week of Oct 13

14 emailed

9 photos

In the books

- ✓ 23 receipts read, \$3,914.62 total
- ✓ 21 coded to accounts and jobs
- ⚠ 2 unclear: sent to you to label

Card charge with no receipt? It asks whoever made it by text, then checks again Monday.

Receipt capture and coding

The most hated chore in the books, done every week so tax season is just a handoff.

WHAT IT DOES

Every Friday it opens the receipts folder, reads each photo and emailed receipt, codes it to the right account and job, and attaches it in the books.

OFF YOUR PLATE

Reading, coding, and attaching every receipt.

☐ ☐ ☐ No. 1.03 · Owen, Bookkeeping & cash flow

#16

CLARITY

☐ INCLUDE

Google Sheets Report

Last week

Sales Jobs Cash Leads Reviews

Sales up 18%. Leads down: check ads.

Weekly numbers for the owner

One page, every Monday, tells you how the business is really doing.

WHAT IT DOES

A one-page Monday report: sales, jobs done, cash, reviews, and what changed, in plain English.

OFF YOUR PLATE

Pulling numbers from five apps.

☐ ☐ ☐ No. 6.07 · Nora, Operations, jobs & orders

What your crew can do

Your crew works the way your staff does: in email, in your files, and inside the apps you already pay for. And the work looks good.

NO. 4.01

Gets its own email address

Your worker answers at an address like `rosa@yourbusiness.com`, and with permission works inside `info@`, `sales@`, and your own inbox.



NO. 5.12

Connects to your business brain

Your prices, policies, procedures, and files gathered into one organized brain in Google Drive, Dropbox, or SharePoint and OneDrive. Every worker answers from it.



NO. 1.12

Signs in and clicks through

QuickBooks, Xero, HubSpot, Shopify, Squarespace: it logs in and does the work like a trained employee.



NO. 2.01

Answers every lead in minutes

Web forms, Google, Yelp, and Thumbtack leads get a reply in minutes, day or night, and a booked estimate.



NO. 2.07

Designs proposals, quotes, and docs

Polished proposals, decks, flyers, and handbooks in your brand, in PowerPoint, Google Slides, Word, or Canva.



NO. 3.13

Fills your social feeds

On-brand posts from your jobs, products, and offers, sized for each platform and scheduled ahead.



Anything sent to people or touching money waits for a person's yes.

WORKS WITH

The apps your business already uses

Your crew signs in to these the way a staff member would. Using something else? If it runs in a browser, ask us. Most can be added.

ACCOUNTING AND PAYMENTS

 QuickBooks

 Xero

 Stripe

 Square

 PayPal

PAYROLL AND HIRING

 Gusto

 ADP

 Paychex

 Indeed

CUSTOMERS AND LEADS

 HubSpot

 Zoho

 Zendesk

 Thumbtack

 HomeAdvisor

 Yelp

EMAIL, CALENDAR, AND MEETINGS

 Gmail

 Outlook

 Google Calendar

 Calendly

 Microsoft Teams

 Zoom

 Slack

 WhatsApp

FILES AND YOUR BUSINESS BRAIN

 Google Drive

 Dropbox

 OneDrive

 SharePoint

 Notion

 Jotform

DOCS, DECKS, AND DESIGN

 Google Docs

 Word

 Google Slides

 PowerPoint

 Google Sheets

 Excel

 Canva

WEBSITE AND ONLINE STORE

 WordPress

 Squarespace

 Wix

 Shopify

 WooCommerce

 Etsy

MARKETING, REVIEWS, AND SOCIAL

 Google Business Profile

 Google Ads

 Meta Ads

 Instagram

 Facebook

 Nextdoor

 YouTube

 Mailchimp

 Constant Contact

SHIPPING AND PROJECTS

 UPS

 FedEx

 Asana

 Trello

 monday.com

RUNS ON

 Claude Duet

or

 Grok Bot

, or on custom offline models built by Stabil.



SECTION 1 · OWEN

Bookkeeping & cash flow

Owen keeps the books and the cash moving.

Invoices, collections, bills, receipts, payroll prep, sales tax, and the numbers you need to run the business.

20 WORKFLOWS ON THE NEXT FOUR PAGES



NO. 1.01 **FEATURED** ☐ INCLUDE

QuickBooks Spreadsheet Waits for your OK

Overdue, oldest first

Customer	Invoice	Days	Next step
Harbor Dental	\$2,400	47	Call owner
Mill St Bakery	\$860	31	2nd reminder
R. Okafor	\$395	12	Reminder sent
Lakeview HOA	\$1,150	9	Promised Fri

Get paid faster

Works your overdue list every week: friendly reminders, then firmer ones, on a schedule you set. Logs every promise to pay and tells you which accounts need a call from you.

THE PROBLEM

Money you already earned sits in other people's bank accounts.

OFF YOUR PLATE

Chasing every overdue invoice by hand.

QuickBooks Xero Email Text

Weekly · QuickBooks, Xero, Email, Text **WAITS FOR YOUR OK**

NO. 1.02 ☐ INCLUDE

QuickBooks Record Waits for your OK

Invoice #1048 Ready to send
Customer Dana Whitfield
Job Water heater swap
Total \$1,865.00

Invoice from finished jobs

When a job or order is marked done, it drafts the invoice from the quote, the hours, and the materials, then sends it once you approve.

QuickBooks Xero

Daily **WAITS FOR YOUR OK**

NO. 1.03 ☐ INCLUDE

Google Drive Weekly routine

Every Friday - 3:00 PM Routine on
Receipts/Week of Oct 13
14 emailed 9 photos In the books
23 receipts read, \$3,914.62 total
21 coded to accounts and jobs
2 unclear: sent to you to label
Card charge with no receipt? It asks whoever made it by text, then checks again Monday.

Receipt capture and coding

Every Friday it opens the receipts folder, reads each photo and emailed receipt, codes it to the right account and job, and attaches it in the books.

Google Gmail QuickBooks

Weekly

NO. 1.04 ☐ INCLUDE

Gmail Heads-up Waits for your OK

5 bills due this week
Supplier \$2,140, Rent \$3,200, Phones \$286, Insurance \$918, Software \$149
Approve all Review

Bills to pay

Collects every bill from email and the mail pile, checks it against what you ordered, and gives you one list to approve each week.

Gmail QuickBooks Xero

Weekly **WAITS FOR YOUR OK**

NO. 1.05 ☐ INCLUDE

Gmail Inbox

Fergus on Supply Invoice 77812 · \$1,284 Entered
City Utilities October statement Entered
Uline Invoice 5521 · \$212 Check qty

Vendor bills entered from email

Reads supplier invoices as they land in the inbox and enters them in the books with the right account, job, and due date.

Gmail Xero QuickBooks

Daily

NO. 1.06 ☐ INCLUDE

QuickBooks Spreadsheet

Payout match

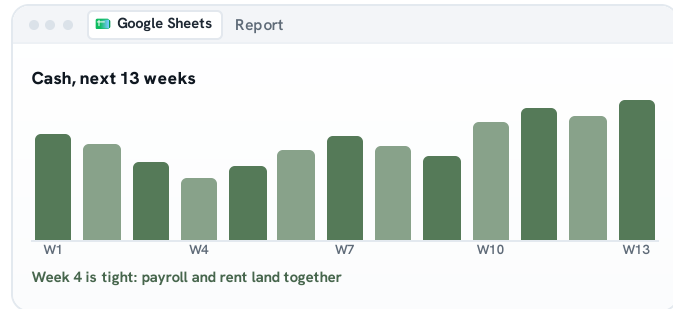
Payout	Sales	Fees	Bank
Oct 13	\$4,210	\$122	Matched
Oct 14	\$2,980	\$86	Matched
Oct 15	\$3,415	\$99	Short \$40

Card and payout matching

Matches Stripe, Square, and PayPal payouts to the bank, separates fees and refunds, and flags anything that does not line up.

QuickBooks Xero PayPal

Weekly

NO. 1.07 **RECOMMENDED** ☐ INCLUDE**Cash flow forecast**

Looks 13 weeks ahead: what is coming in, what is going out, and the weeks that will be tight, so you can plan instead of panic.

Weekly · QuickBooks, Xero, Sheets

NO. 1.08 **RECOMMENDED** ☐ INCLUDE

Google Docs Document

September close

Profit and loss

Cash and receivables

What changed and why

Month-end close packet

Closes the month: reconciles, reviews odd entries, and puts together a short packet with profit and loss, cash, and what changed.

Monthly · QuickBooks, Xero, Docs

NO. 1.09 ☐ INCLUDE

Shopify Checklist Waits for your OK

Q3 sales tax

- ☒ Taxable sales pulled by county
- ☒ Exempt sales documented
- ☒ Return prepped: \$3,412
- ☐ You file or approve

Sales tax prep

Pulls taxable sales by location, checks the rates, and preps each return so it is ready to file on time.

Quarterly **WAITS FOR YOUR OK**

NO. 1.10 ☐ INCLUDE

Google Sheets Spreadsheet Waits for your OK

Payroll, Oct 1 to 15

Name	Hours	OT	Check
Luis	80.0	2.5	OK
Kim	72.5	0	OK
Tara	91.0	11.0	Over?

Payroll prep

Gathers hours, tips, mileage, and time off into a clean payroll file, and flags anything that looks off before you run payroll.

Biweekly **WAITS FOR YOUR OK**

NO. 1.11 ☐ INCLUDE

QuickBooks Checklist

Contractors, 2026

- ☒ 14 W-9s on file
- ☒ Payments tagged by contractor
- ☐ 2 W-9s requested
- ☐ 1099s ready Jan 15

Contractor paperwork and 1099s

Collects W-9s before the first payment, tracks what each contractor is paid, and has every 1099 ready in January.

Ongoing

NO. 1.12 **FEATURED** ☐ INCLUDE**Runs your accounting software**

Signs in to QuickBooks or Xero like a trained bookkeeper: categorizes transactions, attaches receipts, fixes duplicates, and preps the month. You see every change before it is posted.

THE PROBLEM

A bookkeeper you cannot afford full time.

OFF YOUR PLATE

The clicking and categorizing inside your books.

QuickBooks Web app Waits for your OK

qbo.intuit.com/app/banking Signed in as Owen

Banking	Home Depot · \$412.18	Categorized
Expenses	Stripe payout · \$2,980	Matched
Sales	Unknown · \$58.00	Ask owner
Reports	Post 47 changes	

Signed in Reviewed 49 lines Waiting for your OK

Daily · QuickBooks, Xero **WAITS FOR YOUR OK**



NO. 1.14

☐ INCLUDE

Google Sheets Record Waits for your OK

Mileage, Luis R. Policy OK

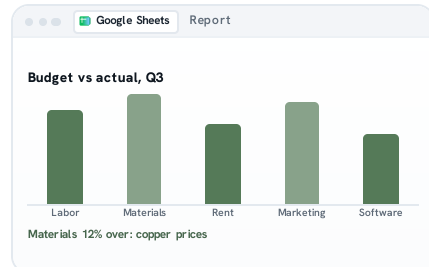
Trips	18 job sites
Miles	412
Amount	\$287.34

Employee expense reports

Turns staff receipts and mileage into clean expense reports, checks them against your policy, and queues reimbursements for your OK.

Monthly **WAITS FOR YOUR OK**

NO. 1.15

☐ INCLUDE

Budget vs actual

A plain-English monthly report: where you are over, where you are under, and why.

Monthly

NO. 1.13

FEATURED☐ INCLUDE

QuickBooks Checklist

September reconciliation

- ☒ Checking: 412 lines matched
- ☒ Business card: 96 lines matched
- ☐ 3 charges need a receipt
- ☐ Your sign-off

Bank and card reconciliation

Matches every bank and credit card line to the books each week, so month-end takes an hour instead of a weekend. Only the true exceptions come to you.

THE PROBLEM

Books that are always a month behind.

OFF YOUR PLATE

Line-by-line matching across bank, card, and books.

Weekly · Bank, Credit cards, QuickBooks, Xero

NO. 1.16

☐ INCLUDE

QuickBooks Spreadsheet

Margin by service

Service	Revenue	Cost	Margin
Repairs	\$41k	\$24k	41%
Installs	\$88k	\$69k	22%
Maintenance	\$19k	\$8k	58%

Job and product profitability

Shows which jobs, services, and products actually make money once labor and materials are counted.

Monthly

NO. 1.17

☐ INCLUDE

QuickBooks Heads-up Waits for your OK

4 subscriptions nobody uses

Design app \$39/mo, Old phone line \$45/mo, Second CRM seat \$60/mo, Survey tool \$25/mo

Cancel for me **Keep**

Unused subscription audit

Finds every software and service you pay for, who uses it, and what you could cancel or downgrade.

Quarterly **WAITS FOR YOUR OK**

NO. 1.18

☐ INCLUDE

Google Drive Document

2026 tax packet

Year-end financials

Assets and loans

Questions for your CPA

Accountant handoff packet

Puts together everything your CPA asks for at tax time and each quarter, organized and labeled, with estimated tax reminders.

Quarterly



NO. 1.19

☐ INCLUDE

⋮ Gmail Email draft Waits for your OK

To Harbor Dental, accounts payable

Subject Your October statement

Attached is your statement for October.
You can pay online with the link below...

Approve and send Edit

Customer statements

Sends monthly statements to accounts that buy on terms, with a link to pay online.

qb xero gmail Monthly **WAITS FOR YOUR OK**

NO. 1.20

☐ INCLUDE

⋮ Stripe Document Waits for your OK

Dispute #CB-2291

Order and delivery proof

Customer messages

Response summary

Chargeback and dispute responses

Gathers the order, receipt, signatures, and messages into a complete response before the deadline.

stripe paypal square As needed **WAITS FOR YOUR OK**



Anything else for Owen?

Write it in below, then add it on the plan form under "Add your own." Rough hours and pay help us size it.

ADD YOUR OWN FOR OWEN

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____



SECTION 2 · SADIE

Leads, sales & customers

Sadie answers every lead and follows up.

Speed to lead, quotes, proposals, follow-ups, your CRM, and the customers who keep coming back.

20 WORKFLOWS ON THE NEXT FOUR PAGES



NO. 2.01 **FEATURED** ☒ INCLUDE

Google Business

Text messages

Hi, do you install mini splits? Need a quote for 2 rooms

Yes we do! Is this for a home or business, and what zip code?

Home, 30062

Great. I can get a tech out Thursday at 10 or Friday at 2. Which works?

Answers every new lead in minutes

Replies to web forms, Google, Yelp, Thumbtack, and Facebook leads in minutes, day or night. Asks your qualifying questions and books the estimate or call on your calendar.

THE PROBLEM
Leads go cold in an hour, and you reply the next day.

OFF YOUR PLATE
Answering, qualifying, and booking every lead.

Daily · Web forms, Google, Yelp, Thumbtack, Text

NO. 2.02 ☐ INCLUDE

HubSpot

Record

Maya Chen

Hot lead

Needs

Kitchen remodel, 2027

Budget

\$40k to \$60k

Source

Google search

Lead notes for every inquiry

Writes up each new lead with what they need, budget, timing, and source, so you walk into every call prepared.

Daily

NO. 2.03 ☐ INCLUDE

Gmail

Email draft

Waits for your OK

To The Brennan family

Subject It has been a year since your last tune-up

Your furnace was last serviced in October 2025. We have openings next week if you would like...

Approve and send Edit

Win back past customers

Finds customers who have not bought or booked in a while and sends a personal note with a reason to come back.

Monthly **WAITS FOR YOUR OK**

NO. 2.04 ☐ INCLUDE

HubSpot

Text messages

Waits for your OK

Thanks again, Jordan! If you know anyone who needs help with their yard, we would be grateful for a referral.

Actually my neighbor asked about you. I will send her your number

Referral asks

Asks happy customers for referrals at the right moment, and tracks who sent whom so you can thank them.

After each job **WAITS FOR YOUR OK**

NO. 2.05 ☐ INCLUDE

Google Docs

Document

Waits for your OK

Service agreement: Whitfield

Scope of work

Price and payment terms

Signatures

Contracts and e-sign prep

Fills your contract template from the accepted quote, checks the details, and sends it for signature once you approve.

Per sale **WAITS FOR YOUR OK**

NO. 2.06 ☐ INCLUDE

Google Docs

Document

Welcome to Lakeside Landscaping

What happens next

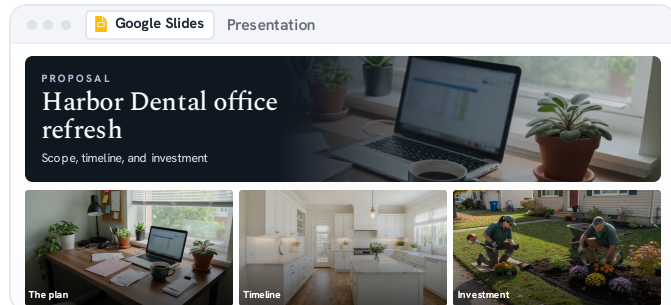
Your crew and contact

How to reach us

New customer welcome packet

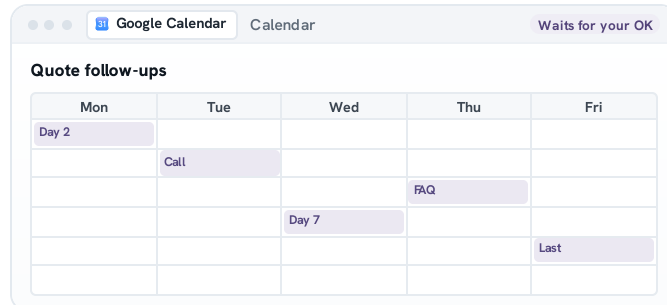
Sends every new customer a welcome note with what happens next, who to contact, and what to prepare.

Per sale

NO. 2.07 **RECOMMENDED**☐ INCLUDE**Proposal decks**

Builds polished proposals and pitch decks from your notes, photos, and pricing, in your brand.

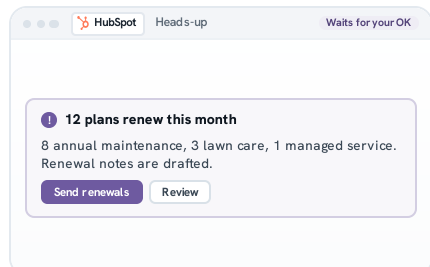
Per bid · Slides, PowerPoint, Docs

NO. 2.08 **RECOMMENDED**☐ INCLUDE**Follow up on open quotes**

Follows up on every open quote on a schedule: a check-in, an answer to common questions, and a last call, until each one is a yes or a no.

Daily · CRM, Email, Text **WAITS FOR YOUR OK**

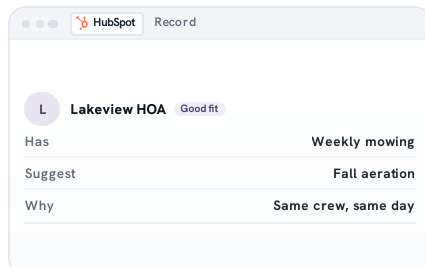
NO. 2.09

☐ INCLUDE**Service plan renewals**

Reminds maintenance plan and contract customers before renewal, with an easy way to renew.

Monthly **WAITS FOR YOUR OK**

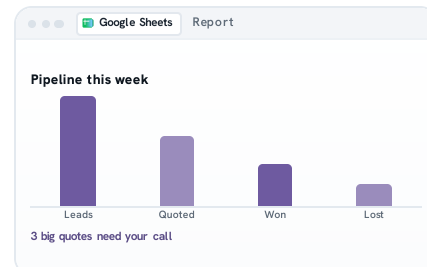
NO. 2.10

☐ INCLUDE**Upsell and add-on suggestions**

Looks at what each customer bought and suggests the next useful thing, for you to offer.

Weekly

NO. 2.11

☐ INCLUDE**Weekly pipeline report**

A short Monday report: new leads, quotes out, wins, losses, and the deals that need you this week.

Weekly

NO. 2.12 **FEATURED**☐ INCLUDE**Works your CRM**

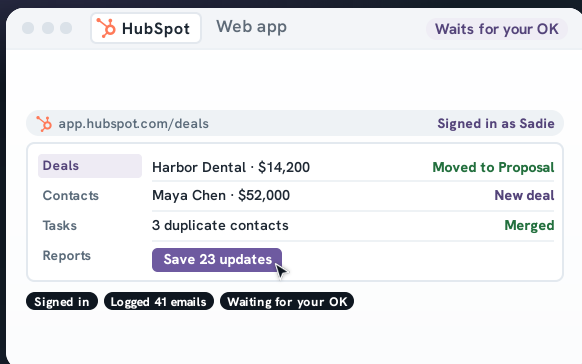
Sigs in to HubSpot, Zoho, or your CRM: logs every email and call, moves deals forward, sets next steps, and cleans up duplicates. Your pipeline stays true without anyone typing.

THE PROBLEM

A CRM you pay for and nobody updates.

OFF YOUR PLATE

Logging, updating, and cleaning every record.



Daily · HubSpot, Zoho, Salesforce **WAITS FOR YOUR OK**



NO. 2.14

☐ INCLUDE

HubSpot Spreadsheet		
Lost, last 90 days		
Reason	Count	Value
Price	14	\$38k
Timing	9	\$22k
No reply	21	\$51k

Lost deal reasons

Tracks why quotes are lost (price, timing, went with someone else) so you can fix the pattern.

Monthly

NO. 2.15

☐ INCLUDE

QuickBooks Spreadsheet		
Waits for your OK		
Price updates		
Item	Old	New
Service call	\$89	\$99
Labor hour	\$110	\$118
Filter	\$22	\$24

Price list upkeep

Keeps your price list and quote templates current when costs change, and flags quotes priced on old numbers.

 Quarterly **WAITS FOR YOUR OK**

NO. 2.13

FEATURED☐ INCLUDE

QuickBooks Spreadsheet		
Waits for your OK		
Estimate #2207 · Chen kitchen		
Item	Qty	Price
Cabinet install	14	\$4,900
Quartz counters	42 sq ft	\$3,780
Plumbing hookup	1	\$650
Total, better option		\$9,330

Quotes and estimates

Builds clean quotes and estimates from your price list, site notes, and photos, with options at good, better, and best. Ready for you to check and send the same day.

THE PROBLEM

Quotes take days, and the fastest bid wins.

OFF YOUR PLATE

Measuring, pricing, and writing every quote.

 Daily · Quote software, Sheets, QuickBooks **WAITS FOR YOUR OK**

NO. 2.16

☐ INCLUDE

Google Docs Document	
Brief: Harbor Dental	
Who they are	
History with us	
What to ask	

Meeting prep briefs

Before a sales call it researches the customer, past orders, and notes, and hands you a one-page brief.

Per meeting

NO. 2.17

☐ INCLUDE

HubSpot Record	
Call with R. Okafor Logged	
Outcome	Wants 2 options
Next step	Send quote Thu
Stage	Proposal

Call notes to the CRM

Turns your voice memos and call notes into clean CRM updates with next steps and dates.

Daily

NO. 2.18

☐ INCLUDE

HubSpot Text messages	
Waits for your OK	
Hi Dana, just checking in on the estimate we sent Tuesday. Any questions I can answer?	
Can we do it the week of the 20th?	

Quote follow-up texts

Sends short, friendly texts on open quotes for customers who never read email.

 Daily **WAITS FOR YOUR OK**



NO. 2.19

☐ INCLUDE

 Email draft Waits for your OK

To **Harbor Dental team**

Subject **One year together**

It has been a year since we started working with you.
Thank you for trusting us with...

Thank-you notes

Sends a personal thank-you after big purchases, anniversaries, and milestones.

  Weekly WAITS FOR YOUR OK

NO. 2.20

☐ INCLUDE

 Inbox

County Schools Due Nov 3

HVAC maintenance RFP

City Parks Due Nov 10

Mowing contract Fit: low

Hospital

Office cleaning

Bid and RFP finder

Watches public bid boards and your industry sites for jobs that fit, and summarizes each one.

  Weekly



Anything else for Sadie?

Write it in below, then add it on the plan form under "Add your own."
Rough hours and pay help us size it.

ADD YOUR OWN FOR SADIE

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____



SECTION 3 · MILO

Marketing & reviews

Milo gets you found and keeps you looking good.

Reviews, your Google listing, social posts, email, the website, and every promo in between.

20 WORKFLOWS ON THE NEXT FOUR PAGES

NO. 3.01

FEATURED

INCLUDE

Google Business

Inbox

Waits for your OK

★★★★★ Jordan P.

"Fast, clean, fair price"

Replied

★★★★★ Ana R.

"Best haircut in town"

Replied

★★☆☆☆ Mike T.

"Late, but good work"

Sent to you

Requests sent

18 this week

6 new reviews

Review requests and replies

After every job or visit it asks happy customers for a Google review, then replies to every review in your voice. Unhappy ones come to you first, before anything is posted.

THE PROBLEM

A great business with 11 reviews.

OFF YOUR PLATE

Asking for reviews and answering every one.

Daily · Google, Yelp, Facebook, Text

WAITS FOR YOUR OK

NO. 3.02

INCLUDE

Mailchimp

Email draft

Waits for your OK

To

Customer list · 2,418

Subject

Fall is here: 3 things to do before the first freeze

A quick checklist to protect your pipes...

Plus, our fall tune-up special.

Approve and schedule

Edit

Monthly email newsletter

Writes and designs your monthly email from what happened this month, your offers, and your news.

Monthly

WAITS FOR YOUR OK

NO. 3.03

INCLUDE

Google Calendar

Calendar

November promos

Mon	Tue	Wed	Thu	Fri
Email				
	Ads			
		Post	Flyer	
				Sale

Seasonal promo calendar

Plans a year of promos around your seasons, holidays, and slow months, with every post and email on the calendar.

Quarterly

NO. 3.04

INCLUDE

Canva

Social graphics

BEFORE

Overgrown and tired

AFTER

Fresh beds, new edging

THIS WEEK

3 yards done

Scheduled Tue and Fri · Instagram and Facebook

Job photo posts

Turns job site and product photos from your team into before-and-after posts with captions.

Weekly

NO. 3.05

INCLUDE

WordPress

Website article

Waits for your OK

lakesidelandscaping.com/blog

HOW-TO

When to aerate your lawn in Georgia

From your crew's know-how · 4 min read

Blog articles from your know-how

Turns your answers to customer questions into helpful articles that bring in search traffic.

Biweekly

WAITS FOR YOUR OK

NO. 3.06

INCLUDE

Google Business

Checklist

Local search, October

Top 3 for "plumber near me"

Hours match on 6 sites

Add 10 service area pages

Respond to 2 questions on Maps

Local search check

Checks how you show up on Google and Maps for the searches that matter, and fixes what it can.

Monthly

NO. 3.07 **RECOMMENDED** ☐ INCLUDE

Google Business Record Waits for your OK

L Lakeside Landscaping Up to date

Rating 4.9 from 212 reviews

This week 2 posts, 8 photos

Questions 3 answered

Google Business Profile upkeep

Keeps your Google listing fresh: hours, holiday hours, photos, weekly posts, and answers to customer questions.

Weekly · Google Business Profile **WAITS FOR YOUR OK**

NO. 3.08 **RECOMMENDED** ☐ INCLUDE

Canva Announcement

NOV 1 TO 15
Fall tune-up special
\$79 furnace check, book online

Post 1:1
Story 9:16
Email banner
Flyer 8.5x11

Promo graphics in every size

Designs each promo in every size you need: post, story, email banner, and print flyer.

Per promo · Canva, Instagram, Facebook

NO. 3.09 ☐ INCLUDE

Google Ads Report Waits for your OK

Ad spend vs leads

Search Maps Facebook Display

Display: \$410 spent, 1 lead. Pause it?

Ad results in plain English

Reads your Google and Meta ad accounts and tells you what worked, what wasted money, and what to change.

Monthly **WAITS FOR YOUR OK**

NO. 3.10 ☐ INCLUDE

Google Docs Document

Competitor summary, October

Price changes

New offers

What customers say about them

Competitor watch

Keeps an eye on competitors' prices, offers, reviews, and new services, and sends a short monthly summary.

Monthly

NO. 3.11 ☐ INCLUDE

Gmail Record

Ana Ruiz Permission on file

Quote Approved for website

Photo Yes

Service Color and cut

Testimonial collection

Asks happy customers, with their permission, for a short quote or photo you can use on your site and in proposals.

Monthly

NO. 3.12 **FEATURED** ☐ INCLUDE

Runs your website

Sigs in to WordPress, Squarespace, Wix, or Shopify and keeps pages, prices, hours, photos, and offers current. You see every change before it goes live.

THE PROBLEM
A website with last year's prices on it.

OFF YOUR PLATE
Logging in and editing pages for every change.

WordPress Web app Waits for your OK

lakeside.squarespace.com/config/pages Signed in as Milo

Pages Services and pricing Updated

Services Fall special New page

Gallery Holiday hours Draft

Blog Publish

Signed in Edited 3 pages Waiting for your OK

Weekly · WordPress, Squarespace, Wix, Shopify **WAITS FOR YOUR OK**

NO. 3.14

☐ INCLUDE

Shopify Record Waits for your OK

L Lavender Soy Candle Draft

Title Hand-poured, 8 oz

Tags candle, gift, lavender

Photos 4 cleaned up

Product listings and descriptions

Writes product titles, descriptions, and tags, and tidies product photos for your store.

   Per product **WAITS FOR YOUR OK**

NO. 3.15

☐ INCLUDE

Mailchimp Calendar

Open house promotion

Mon	Tue	Wed	Thu	Fri
Email				Reminder
		Nextdoor		
	Post			
			Text	

Event and workshop promotion

Promotes your open house, class, or sale with emails, posts, and a sign-up page.

   Per event

NO. 3.16

☐ INCLUDE

Google Docs Document

Lakeside brand kit

Logo and colors

Fonts and voice

Templates

Brand kit and templates

Gathers your logo, colors, fonts, and voice into one kit and builds templates everyone can use.

   Once, then as needed

NO. 3.13

FEATURED

☐ INCLUDE

Canva Social graphics





Scheduled Mon, Wed, Fri · Instagram, Facebook, Nextdoor

Social graphics and posts

Designs a week of on-brand posts from your jobs, products, offers, and tips, writes the captions, and schedules them all.

THE PROBLEM

Social accounts that go quiet for months.

OFF YOUR PLATE

Designing, writing, and scheduling every post.

    Weekly · Instagram, Facebook, Nextdoor, Canva

NO. 3.17

☐ INCLUDE

YouTube Editor Waits for your OK



- Best 30 seconds picked
- Captions added
- Logo and music added
- 3 sizes exported

Intro Point 1 Prayer

Short videos from your footage

Cuts phone footage into short, captioned clips for Reels, Shorts, and your site.

   Weekly **WAITS FOR YOUR OK**

NO. 3.18

☐ INCLUDE

Google Business Checklist

Listings check

- ☒ Google and Apple Maps match
- ☒ Yelp hours fixed
- ☐ Old phone number on 2 directories
- ☐ Bing listing claimed

Listings everywhere match

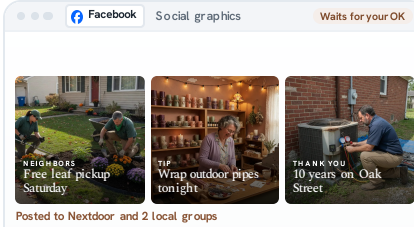
Keeps your name, hours, phone, and services the same on Google, Yelp, Apple Maps, Bing, Facebook, and directories.

   Quarterly



NO. 3.19

☐ INCLUDE



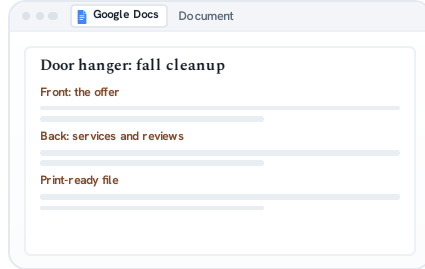
Neighborhood and community posts

Shares your news, offers, and helpful tips in Nextdoor and local groups where neighbors look for recommendations.



NO. 3.20

☐ INCLUDE



Flyers and mailers

Designs door hangers, flyers, and postcards, and preps the files for your printer or mail service.



Anything else for Milo?

Write it in below, then add it on the plan form under "Add your own." Rough hours and pay help us size it.

ADD YOUR OWN FOR MILO

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____



SECTION 4 · ROSA

Front desk, inbox & scheduling

Rosa runs the front desk.

The inbox, the phones, bookings, reminders, and the hundred small questions customers ask every week.

20 WORKFLOWS ON THE NEXT FOUR PAGES



NO. 4.01

FEATURED

INCLUDE

Outlook

Mail

Rosa31

Info12

Sales7

Owner4

From

rosa@lakesidelandscaping.com

To

Dana Whitfield

Hi Dana! Yes, we can do Thursday at 10. Y...

Answered 31 emails today · 5 sent to the owner

Its own email address

Your worker gets its own address, like rosa@yourbusiness.com. Customers can email it, and it answers, books, files, and follows up in your voice. With permission it also works inside info@ and your own inbox.

THE PROBLEM

An inbox that runs your day.

OFF YOUR PLATE

Reading, answering, and filing email.

Icons: Gmail, Outlook

Daily · Gmail, Outlook

NO. 4.02

INCLUDE

Gmail

Email draft

To

Chris Patel

Subject

Re: Do you service Marietta?

Yes, Marietta is in our service area.
Our next opening is Tuesday morning...

Send

Edit

Answers common questions

Answers hours, prices, service area, and policy questions by email and text from your own answers.

Icons: Gmail, Outlook

Daily

NO. 4.03

INCLUDE

Facebook

Text messages

Do you take walk-ins today?

We do until 4! The wait right now is about 20 minutes. Want me to hold a spot for you?

Yes please, Sam

Website chat and DMs

Replies to website chat, Facebook, Instagram, and WhatsApp messages fast, and books or hands off to you.

Icons: Facebook, Instagram, WhatsApp

Daily

NO. 4.04

INCLUDE

Google Calendar

Calendar

This week

Mon	Tue	Wed	Thu	Fri
Site visit	Vendor		Call	
		Install		Review

Meeting scheduling

Finds times across calendars, sends invites, and handles the back and forth with customers and vendors.

Icons: 31, Outlook, Calendar

Daily

NO. 4.05

INCLUDE

Gmail

Checklist

Your Tuesday

6 jobs scheduled, all confirmed

\$4,210 came in yesterday

Call Harbor Dental about invoice

Approve 2 quotes

Morning brief for the owner

Each morning: today's schedule, money in, anything urgent, and the three things that need you.

Icons: Gmail, 31, qb

Daily

NO. 4.06

INCLUDE

Calendly

Text messages

Hi Priya, a 2:30 opened up today. Want it?

Yes!

You are booked. See you at 2:30.

Waitlist and cancellation fill

When someone cancels, it offers the slot to your waitlist by text and fills it.

Icons: Calendly, 31

Daily



NO. 4.07 **RECOMMENDED** ☐ INCLUDE

Google Calendar

Text messages

Reminder: your cleaning is tomorrow at 9 AM. Reply C to confirm or R to reschedule.

R

No problem. I have Thursday at 9 or Friday at 1. Which works?

Appointment reminders and no-show follow-up

Sends reminders, confirms, and handles reschedules. When someone no-shows, it reaches out the same day to rebook.

Daily · Booking software, Text, Calendar

NO. 4.08 **RECOMMENDED** ☐ INCLUDE

Gmail

Record

Voicemail, 9:42 am **Handled**

Caller

Mike Torres

Needs

Leak under kitchen sink

Action

Booked today 2 PM

Voicemail to action

Listens to every voicemail, writes it up, and turns it into a booking, a callback, or a task for the right person.

Daily · Phone system, Email, Calendar

NO. 4.09 ☐ INCLUDE

Shopify

Email draft

To

Kelly Morgan

Subject

Re: Where is my order #3391?

Your order shipped Monday with UPS.
It is out for delivery today. Tracking...

Send

Edit

Where is my order?

Answers order status questions with tracking details, and flags late shipments before the customer asks.

Daily

NO. 4.10 ☐ INCLUDE

Google Docs

Document

Notice of rate change

What is changing

When it starts

Questions

Letters and forms

Drafts letters, notices, and forms from your templates, ready to sign.

Weekly

NO. 4.11 ☐ INCLUDE

Jotform

Checklist

Tomorrow's intake

☒ 5 of 7 forms returned

☒ Waivers signed

☐ 2 reminders sent this morning

☐ Insurance card for R. Okafor

Paperwork before the appointment

Sends intake forms and waivers ahead of time and follows up until they are back.

Daily

NO. 4.12 **FEATURED** ☐ INCLUDE

Inbox triage every morning

Sorts every shared inbox before you start: answers what it can, files receipts and orders, flags what needs you, and clears out the spam and sales pitches.

THE PROBLEM

Starting every day under 200 unread emails.

OFF YOUR PLATE

Sorting, answering, and filing.

Daily · Gmail, Outlook



NO. 4.14

☐ INCLUDE

Google Gmail Heads-up Waits for your OK

Upset customer: M. Torres

Tech arrived 2 hours late, no call. Suggested: apologize and take \$50 off. Reply drafted.

Approve I will call

Complaint first response

Answers an upset customer quickly and kindly, gathers the facts, and brings it to you with a suggested fix.

As needed WAITS FOR YOUR OK

NO. 4.15

☐ INCLUDE

WhatsApp Text messages

Tomorrow's visit please clear the area under your sink and secure pets. Your tech is Luis.

Will do, thanks!

Directions and prep instructions

Sends customers what to know before you arrive or they come in: parking, prep, what to bring.

Daily

NO. 4.16

☐ INCLUDE

Google Business Checklist

Thanksgiving hours

- ☒ Website banner
- ☒ Google and Facebook
- ☒ Email auto-reply
- ☐ Phone greeting script sent to you

Holiday hours everywhere

Updates your hours on the website, Google, Facebook, phone greeting, and email signature in one go.

As needed

NO. 4.13

FEATURED

☐ INCLUDE

Google Calendar Calendar

Bookings this week

Mon	Tue	Wed	Thu	Fri
Okafor		Patel		
	Chen			Ruiz
			Harbor	
	Brennan			

Online booking and rescheduling

Books, moves, and cancels appointments by email, text, and chat, right on your calendar, with your rules for job length, travel, and buffers.

THE PROBLEM

Phone tag just to book one appointment.

OFF YOUR PLATE

Booking, moving, and confirming every appointment.

Daily · Google Calendar, Outlook, Calendly, Booking software

NO. 4.17

☐ INCLUDE

HubSpot Record

Dana Whitfield Updated

New phone (404) 555-0182

Gate code 4412

Prefs Text, mornings

Customer record updates

Keeps addresses, phone numbers, and preferences current when customers tell you something new.

Daily

NO. 4.18

☐ INCLUDE

Google Drive Record

Mail, Oct 15 Routed

Checks 2, \$1,840 total

Bills 3 to Owen

Notices 1 county permit

Mail and package log

Logs incoming mail and packages from photos, and routes bills, checks, and notices to the right person.

Daily



NO. 4.19

☐ INCLUDE

Email draft

To

Chris Patel

Subject

How did everything go yesterday?

Thanks for having us out.
Is everything working the way it should?

Approve and send

Edit

Follow-up after the visit

Checks in after a visit or delivery to make sure everything went well, and catches problems early.

Daily

NO. 4.20

☐ INCLUDE

Text messages

Sorry we missed your call! This is Lakeside Landscaping. What can we help with?

Need a quote on fall cleanup

Happy to. I can have someone out Thursday at 3 or Friday at 10. Which works?

Missed-call text back

When a call goes unanswered, it texts the caller within a minute, finds out what they need, and books them or sets a callback, so the call does not go to the next business on the list.

Daily



Anything else for Rosa?

Write it in below, then add it on the plan form under "Add your own." Rough hours and pay help us size it.

ADD YOUR OWN FOR ROSA

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____



SECTION 5 · THEO

Team, HR & admin

Theo keeps your team and your paperwork straight.

Hiring, onboarding, schedules, timesheets, policies, licenses, insurance,
and the research behind good decisions.

20 WORKFLOWS ON THE NEXT FOUR PAGES

NO. 5.01 **FEATURED** ☐ INCLUDE

 **Inbox** Waits for your OK

- Lead tech posting
47 applicants Live
- Strong fit
6 people Interviews booked
- Maybe
11 people For you to review
- Not a fit
30 people Thank-you sent

Hiring from post to interview

Writes the job post, posts it to Indeed and your site, screens every applicant against your must-haves, and books interviews with the best ones.

THE PROBLEM
Hiring eats weeks you do not have.

OFF YOUR PLATE
Posting, screening, and scheduling.

   **When hiring** · Indeed, Email, Calendar **WAITS FOR YOUR OK**

NO. 5.02 ☐ INCLUDE

 **Spreadsheet**

Timesheets, this period

Name	Issue	Status
Kim	No clock-out Tue	Asked
Tara	11 hrs OT	Owner OK?
Luis	All good	Done

Timesheet cleanup

Catches missed punches, overtime, and odd hours before payroll, and asks the right person to fix them.

   **Weekly**

NO. 5.03 ☐ INCLUDE

 **Heads-up** Waits for your OK

3 renewals coming up
Contractor license Dec 1, Health permit Dec 15, Vehicle registration Jan 3. Forms prepped.
Start renewals Remind me

License and permit renewals

Tracks every business license, permit, and certification and starts renewals before they lapse.

  **Monthly** **WAITS FOR YOUR OK**

NO. 5.04 ☐ INCLUDE

 **Checklist**

Certificates of insurance

- ☒ 9 subs current
- ☒ Sent ours to Harbor Dental
- ☐ 2 subs expiring this month
- ☐ 1 sub below required limit

Insurance certificates

Requests certificates from subcontractors, checks dates and limits, and sends yours to customers who ask.

  **Monthly**

NO. 5.05 ☐ INCLUDE

 **Spreadsheet**

Agreements

Agreement	Renews	Notice
Office lease	Mar 2027	90 days
Phone system	Jan 2027	30 days
Fleet lease	Jun 2027	60 days

Contracts and agreements tracker

Keeps one list of leases, vendor contracts, and service agreements with renewal dates and terms.

  **Monthly**

NO. 5.06 ☐ INCLUDE

 **Document** Waits for your OK

Employee handbook 2027

Time off and scheduling

Safety and vehicles

What we expect

Employee handbook upkeep

Keeps your handbook and policies current and easy to read, and tracks who has signed the latest version.

   **Yearly** **WAITS FOR YOUR OK**

NO. 5.08

RECOMMENDED

INCLUDE

Google Docs

How-to guide

How to close out a job

- Take after photos
- Mark the job complete
- Collect payment on the tablet

Training guides from how you work

Turns how you actually do things into step-by-step guides with screenshots, so training does not depend on you.



As needed · Docs, Drive, Notion

NO. 5.09

INCLUDE

Google Calendar

Record

Waits for your OK



Time off: Tara M.

Ready to approve

Dates

Nov 24 to 26

Coverage

Luis can cover

Balance

4 days left

Time-off requests

Takes time-off requests, checks coverage, and brings you a yes or no with the schedule impact.

31

G

Weekly

WAITS FOR YOUR OK

NO. 5.10

☐ INCLUDE

Jotform

Checklist

Weekly safety

☒ Vehicle inspections: 4 of 4

☒ Fire extinguishers checked

☐ Ladder inspection missing

☐ First aid kit restock

Safety and compliance checklists

Sends daily and weekly safety checklists, collects them, and flags anything missed.

NO. 5.11 INCLUDE

Google Docs Document

Monday team meeting

Decisions

Who does what

Follow up Friday

Meeting notes and action items

Takes notes in your team meetings, sends out who does what by when, and follows up.

Weekly

NO. 5.12

FEATURED

INCLUDE

Your business brain

Gathers your prices, policies, procedures, and files into one organized brain in Google Drive, Dropbox, or SharePoint. Every worker, and every new hire, answers from it.

THE PROBLEM

Every answer means asking the owner.

OFF YOUR PLATE

Organizing files and answering from them.

NO. 5.14

☐ INCLUDE

New van options		
Option	Price	Payload
Transit 250	\$48,900	3,800 lb
ProMaster	\$46,200	4,100 lb
Sprinter	\$56,500	3,600 lb

Research and price comparisons

Compares vendors, equipment, software, and insurance quotes, and gives you a clear side-by-side.

As needed

NO. 5.15

☐ INCLUDE

Fleet service				
Mon	Tue	Wed	Thu	Fri
Van 2 oil		Van 1 tires		
			Lift inspect	
	Mower blades			
				Van 3

Equipment and vehicle upkeep

Tracks service dates, mileage, and repairs for vehicles and equipment, and books service before things break.

Monthly

NO. 5.16

☐ INCLUDE

Review: Luis R.

Wins this year

Customer feedback

Goals for next year

Performance review prep

Gathers notes, numbers, and customer feedback for each person before reviews, so they are fair and fast.

Yearly

NO. 5.13

FEATURED

☐ INCLUDE

Google Calendar
Task schedule

This week's crew

Mon 7 AM
Oak St install

Luis
Confirmed

Tue 8 AM
Harbor Dental service

Kim
Confirmed

Wed 7 AM
Chen kitchen demo

Tara
Swap asked

Someone calls out? It finds a fill-in and updates the schedule.

Staff schedules and shift swaps

Builds the weekly schedule around availability and busy times, handles swaps and call-outs, and texts everyone their shifts.

THE PROBLEM

Sunday nights spent building the schedule.

OFF YOUR PLATE

Building schedules and handling every change.

Weekly · Calendar, Text, Scheduling app

NO. 5.17

☐ INCLUDE

Equipment loan application

Business summary

Financials attached

Use of funds

Bank, loan, and grant paperwork

Gathers documents and drafts answers for loan, line of credit, and grant applications.

As needed **WAITS FOR YOUR OK**

NO. 5.18

☐ INCLUDE

Downloads folder	
Sorted	214 files
Renamed	96 files
Moved	Jobs, HR, Finance

Files where they belong

Names, sorts, and files documents and photos so anyone can find them.

Weekly



NO. 5.19

☐ INCLUDE

Text messages

Heavy rain tomorrow: outdoor jobs move to Thursday. Indoor crews start at 8 as usual.

Got it, thanks

Team announcements

Sends schedule changes, weather calls, and company news to the team by text or chat.

  As needed

NO. 5.20

☐ INCLUDE

Google Sheets Spreadsheet

Certifications

Name	Cert	Expires
Luis	EPA 608	2028
Kim	CPR	Dec 2026
Tara	Forklift	Jan 2027

Certifications and training tracker

Tracks who is certified for what and when it expires, and schedules renewals.

  Monthly



Anything else for Theo?

Write it in below, then add it on the plan form under "Add your own." Rough hours and pay help us size it.

ADD YOUR OWN FOR THEO

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____



SECTION 6 · NORA

Operations, jobs & orders

Nora leads the crew and keeps the work moving.

Jobs, dispatch, orders, inventory, suppliers, and the weekly numbers
that tell you how it is going.

20 WORKFLOWS ON THE NEXT FOUR PAGES

NO. 6.01

FEATURED

INCLUDE

Google Calendar

Task schedule

Today's routes

8:00 AM

Okafor: furnace tune-up

Luis

Confirmed

10:30 AM

Harbor Dental: AC service

Kim

On the way

1:00 PM

Chen: kitchen rough-in

Tara

Parts ready

Job runs long? It moves the next one and texts the customer.

Dispatch and job scheduling

Builds each day's jobs around location, skills, and parts, sends techs their routes and details, and reshuffles when a job runs long or someone calls out.

THE PROBLEM

Mornings spent on the phone sorting out the day.

OFF YOUR PLATE

Planning routes and juggling the schedule.

31

Daily

Job software, Calendar, Text

NO. 6.02

INCLUDE

Jotform

Checklist

Job #4471 close-out

Before photos

Checklist complete

After photos

Customer signature

Job checklists and photo sign-off

Sends each job's checklist, collects before and after photos, and closes out the job when everything is in.

Daily

NO. 6.03

INCLUDE

Gmail

Record

W Work order #4472 Scheduled

Customer

Lakeview HOA

Task

Replace 3 sprinkler heads

Parts

Rain Bird 1800 x3

Work orders from requests

Turns every request from email, phone, and forms into a clear work order with the details your team needs.

Daily

NO. 6.04

INCLUDE

Shopify

Record

Waits for your OK

R Return #R-118 Refund pending

Item

Candle set, wrong scent

Policy

Within 30 days

Label

Sent

Returns and exchanges

Handles return requests by your policy: approves, sends labels, tracks the package, and issues the refund for your OK.

Daily

WAITS FOR YOUR OK

NO. 6.05

INCLUDE

Gmail

Heads-up

3 supplier prices went up

Copper fittings +9%, Mulch +6%, Shipping boxes +4%.

Your prices have not changed.

Update my prices

Ignore

Supplier price changes

Watches supplier invoices and price lists and tells you when costs go up, so your prices keep up.

Weekly

NO. 6.06

INCLUDE

QuickBooks

Spreadsheet

Chen kitchen, in progress

Cost	Budget	Actual
Labor	\$3,200	\$2,450
Materials	\$4,100	\$4,380
Subs	\$900	\$0

Job costing

Tracks labor, materials, and subs against each job's budget while it is running, not after.

Weekly

NO. 6.07 **RECOMMENDED** ☐ INCLUDE

Google Sheets Report

Last week

Sales Jobs Cash Leads Reviews

Sales up 18%. Leads down: check ads.

Weekly numbers for the owner

A one-page Monday report: sales, jobs done, cash, reviews, and what changed, in plain English.

Weekly · Accounting, CRM, Job software

NO. 6.08 **RECOMMENDED** ☐ INCLUDE

Gmail Email draft Waits for your OK

To Ferguson Supply, orders

Subject PO 2291: parts for next week

Please confirm availability and delivery for:
14 items, list attached...

Approve and send Edit

Purchase orders to suppliers

Builds purchase orders from low stock and upcoming jobs, sends them once you approve, and tracks delivery.

Weekly · Email, Inventory, Accounting **WAITS FOR YOUR OK**

NO. 6.09 ☐ INCLUDE

Google Calendar Calendar

Deliveries

Mon	Tue	Wed	Thu	Fri
North			Pickup	
	East	South		
				West

Delivery and route planning

Plans delivery routes and windows, and texts customers when you are on the way.

Daily

NO. 6.10 ☐ INCLUDE

WhatsApp Text messages

Hi Ray, confirming drywall at the Chen job Thursday 8 AM. Plans attached.

Confirmed. Crew of 3

Subcontractor coordination

Books subs, confirms dates, sends job details, and follows up on progress.

Weekly

NO. 6.11 ☐ INCLUDE

Gmail Email draft Waits for your OK

To Maya Chen

Subject Your kitchen: week 2 update

Cabinets are in and level.
Counters are templated for next Tuesday...

Approve and send Edit

Customer project updates

Sends customers a short update on their project each week: what got done, what is next, any decisions needed.

Weekly **WAITS FOR YOUR OK**

NO. 6.12 **FEATURED** ☐ INCLUDE

Order processing

Sigs into Shopify, Square, or WooCommerce: checks each new order, prints packing slips and labels, sends tracking, and flags anything unusual before it ships.

THE PROBLEM

Evenings spent packing and printing labels.

OFF YOUR PLATE

Every step from order to tracking email.

Shopify Web app Waits for your OK

admin.shopify.com/orders Signed in as Nora

Orders #3391 · 2 items Label printed

Products #3392 · Gift note Packed

Customers #3393 · Address issue Ask customer

Analytics Ship 18 orders

Signed in Checked 19 orders Waiting for your OK

Daily · Shopify, Square, WooCommerce, UPS, FedEx **WAITS FOR YOUR OK**

NO. 6.14

☐ INCLUDE

Google Docs How-to guide

How to pack a fragile order

- 1 Wrap each jar in two sheets
- 2 Fill gaps with paper
- 3 Mark the box FRAGILE

Standard procedures

Writes and keeps your standard procedures current, so every job and order is done the same way.

  As needed

NO. 6.15

☐ INCLUDE

QuickBooks Checklist

Tuesday wrap-up

- ☒ 6 of 6 jobs closed
- ☒ 18 orders shipped
- ☒ Payments logged
- ☐ 2 follow-ups for tomorrow

End of day wrap-up

Checks that every job is closed, every order shipped, and every payment logged, and lists what rolls to tomorrow.

  Daily

NO. 6.16

☐ INCLUDE

Google Calendar Calendar Waits for your OK

Inspections

Mon	Tue	Wed	Thu	Fri
		Electrical		
Rough-in			Plumbing	Final

Permits and inspections

Applies for permits, schedules inspections, and keeps the job moving around them.

  Per job **WAITS FOR YOUR OK**

NO. 6.13

FEATURED

☐ INCLUDE

QuickBooks Spreadsheet Waits for your OK

Low stock

Item	On hand	Reorder at	Order
16 oz jars	140	200	500
Lavender oil	2 L	3 L	10 L
Shipping box...	60	100	250
Gift tags	1,200	500	None

Inventory and reorders

Keeps a live count from sales and job usage, warns you before you run low, and drafts reorders at the right quantities.

THE PROBLEM

Out of stock on your best seller.

OFF YOUR PLATE

Counting, watching, and reordering.

     Daily · Shopify, Square, Sheets, Accounting **WAITS FOR YOUR OK**

NO. 6.17

☐ INCLUDE

Shopify Spreadsheet

Cycle count, aisle 3

Item	System	Counted
Filters 16x25	48	44
Thermostats	12	12
Fittings, 1/2 in	300	281

Stock counts

Plans cycle counts, collects counts from your team, and fixes the numbers in your system.

   Monthly

NO. 6.18

☐ INCLUDE

QuickBooks Spreadsheet

PO 2291 vs invoice

Item	Ordered	Billed
Fittings	100	100
Valves	20	24
Pipe	40 ft	40 ft

Order and invoice match

Checks supplier invoices against your purchase orders and what actually arrived before you pay.

  Weekly



NO. 6.19

☐ INCLUDE

Record

Callback: Okafor Visit Thursday

Issue

Igniter failed

Warranty

Parts, 5 years

Claim

Filed with maker

Warranty and callback tracking

Tracks warranty claims and callbacks, books the return visit, and files the claim with the manufacturer.

Weekly

NO. 6.20

☐ INCLUDE

Text messages

Good news: your order is ready for pickup at our Main St shop until 6 PM.

I will come by at 5

Pickup and ready notices

Tells customers when their order, repair, or alteration is ready, and reminds them if it sits.

Daily



Anything else for Nora?

Write it in below, then add it on the plan form under "Add your own." Rough hours and pay help us size it.

ADD YOUR OWN FOR NORA

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

☐ _____ hrs per wk _____ \$ per hr _____

YOUR NEXT STEP



Send us what you checked.

Scan or photograph the pages you marked, or save this PDF with your boxes checked. Then upload it when you book your free call. A solution architect walks through every pick with you.

1

Check the boxes

Mark every workflow you want help with. Circle your favorites.

2

Upload your pages

At stabilsystems.com/business-plan, choose "Or upload notes or files." Add your own workflows there too.

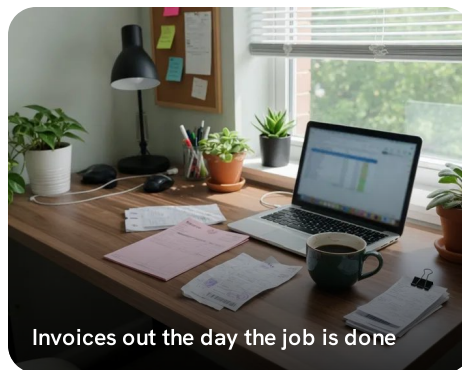
3

Meet your architect

A free 45-minute call. After it, you decide if you want a written plan.



Every lead answered while you work



Invoices out the day the job is done



Orders shipped, reviews answered

stabilsystems.com/business-plan

Anything sent to people or touching money waits for a person's yes.