

Off The Tools In 30 Days.

Take your first real week off
without the wheels coming off.

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WHAT THIS IS

The Playbook.

In the next 30 days you will set up your business so it can run a full week without you. Phone gets answered. Jobs get done. Money still hits the bank.

You will not need new software.

You will not need to hire more people.

You will not need to fire anyone.

You will need to do the work in this guide. About 60 to 90 minutes a day for 30 days. That is the whole ask.

THE PROMISE

Do every step and you take a real week off on day 31.

Not a fake week where you check your phone every hour. A real one. Phone stays in your pocket. Wife and kids get your face back. Business keeps running. Money keeps hitting the bank.

WHY THIS WORKS

Hope is not a plan.

Most trade owners try to take time off by hoping. They hope the team handles it. They hope nothing breaks. They hope no big customer calls.

Then a customer calls. The owner picks up. The vacation ends before it started.

This guide replaces hope with three things.

1. Clear rules for who does what.
2. Three written steps for the work that always pulls you back in.
3. A test every Friday to know if it worked.

When those three things are in place, you can leave. The business runs because the rules tell it how. Not because you are answering the phone at the lake.

"People buy your standards not your presence."

Dan Martell

PART 1

The 5-Stage Owner Exit Path.

Every trade business owner lives in one of five stages. You can only move up one stage at a time. You cannot skip a stage.

Most owners are stuck in Stage 1 or Stage 2 and do not know it. They think the answer is to work harder. Or hire one more person. Or buy new software.

None of those fix the real problem. The real problem is the stage. Until you see where you are, you cannot move up.

- | | | |
|----------|-----------------|--------------------------------|
| 1 | OPERATOR | You are the work. |
| 2 | FOREMAN | Every call goes through you. |
| 3 | MANAGER | You run the people. |
| 4 | OWNER | Others run the day-to-day. |
| 5 | INVESTOR | The business runs without you. |

Most trade owners reading this are in Stage 1 or Stage 2. This guide moves you to a clean Stage 2 where you can leave for a week.

PART 1 / DETAIL

Find your stage.

1

OPERATOR

You are the business. You swing the hammer. You quote the jobs. You answer the phone. If you stop working for a day, money stops coming in that day.

HOW TO SPOT IT. You work in the field most days.

2

FOREMAN

You stopped doing the work but every choice still routes through you. Your team will not move without asking. You quote, you schedule, you fight the fires, you sign the checks. The business runs but you are the engine.

HOW TO SPOT IT. Your phone rings all day even when you are not on a job.

3

MANAGER

You manage people. You set the schedule. You hire and fire. Your team handles their own work but you set the targets and check the numbers.

HOW TO SPOT IT. Most of your day is in the office or driving between job sites.

4

OWNER

The business runs without you in the daily flow. Someone else manages the team. You set direction. You read the numbers weekly. You only step in when something big happens.

HOW TO SPOT IT. You can leave for two weeks and revenue does not drop.

5

INVESTOR

The business is an asset. You own it. You do not run it. Your job is to put money where it grows and pull money out when it makes sense.

HOW TO SPOT IT. You could sell it tomorrow and buy a new one Monday.

PART 2

The 10-Hour Audit.

You have to know where your week goes before you can buy it back.

For five days, write down every task you do for more than five minutes. Use the grid on the next page. Be honest. Be lazy in your tracking, not in your notes. Quick is better than perfect.

At the end of five days, total each row.

Three lines tell the story.

- Phone calls. How many hours did the phone eat?
- Scheduling jobs. How many hours did you spend moving the puzzle?
- Checking on field jobs. How many hours did you drive by or call?

Those three lines are where ten hours of your week is hiding. The three SOPs in Part 3 hand those three lines to your team. You get the hours back.

RULE OF THE AUDIT

Do not change your behavior while you track.

If you clean up your week to look better on paper, the audit lies. The point is to see the truth. Even if the truth is ugly. Especially if the truth is ugly.

PART 2 / WORKSHEET

Track every minute for one week.

Print this page. Tape it to your truck dash or your office wall. Write the minutes spent each day on each task. Total the row on Friday.

TASK	MON	TUE	WED	THU	FRI	TOTAL
Answering the phone						
Returning calls						
Building the schedule						
Changing the schedule						
Driving to check on jobs						
Quoting new work						
Paperwork and billing						
Customer problems						
Other (write in)						
Other (write in)						
DAILY TOTAL (minutes)						

AFTER FIVE DAYS. Circle the three rows with the highest totals. Those three rows are what Part 3 hands to your team.

PART 3

The Three SOPs That Pull You Out.

An SOP is just a written rule for how something gets done every time. Same way. By the same person. With the same result.

You only need three SOPs to take your first week off. Not ten. Not fifty. Three.

The three reasons you cannot leave.

- The phone rings and you answer it.
- The schedule lives in your head.
- You do not know what is happening on the job sites.

Each SOP on the next three pages kills one of those three reasons. Print each one. Tape it where the person doing the job can see it. Walk them through it once. Then let them run.

RULE OF SOPS

Written down or it does not exist.

A rule in your head is not a rule. It is a hope. Hope leaves with you on vacation. Written rules stay behind and do the work.

SOP #1

Phone Handling.

The phone is the number one reason owners cannot leave. It rings. You answer. You are pulled back in.

Who answers the phone.

A named person on your team. If you do not have one, hire a virtual phone answering service before day 1 of the install. Cost is \$200 to \$500 a month. Worth every dollar.

Hours.

Live answer from 7am to 5pm Monday through Friday. After hours and weekends go to voicemail with a callback message: "Thanks for calling. We will call you back by 8am the next business day."

Three buckets. Every call goes in one.

Bucket 1. New customer wants service.

- Get name, address, phone, problem in one sentence.
- Say: "We will have someone call you back within two hours with a time slot."
- Pass to the scheduler.

Bucket 2. Current customer has a question.

- About a scheduled job. Scheduler handles.
- About a bill. Send to billing email. Confirm reply by end of day.
- Complaint. See escalation rules below.

Bucket 3. Vendor or sales call.

- Take name and number. Tell them we will call back by end of week.
- Never give out the owner's cell phone.

SOP #1 / CONTINUED

Phone Handling.

What goes to the owner.

The owner only gets called for these things.

- A customer is yelling and will not stop.
- A job is going to run more than \$500 over the estimate.
- A team member is hurt.
- A truck is in an accident.
- A check from a customer bounced.

That is the list. Nothing else.

The magic line.

When a caller asks for the owner, the phone person says this. Word for word.

SCRIPT

Use this line every time.

"John is on a job site right now. I will get a message to him and he will call you back by end of day if he needs to. Most things I can handle right here. What is the question?"

Nine out of ten callers will explain the problem. Your phone person will route it. The owner does not need to call back.

Daily phone log.

At end of day, phone person sends a one-page log to the owner. Total calls, new leads, complaints, and anything the owner needs to know tomorrow. Owner reads it. Owner does not call back. That is the SOP.

SOP #2

Schedule Management.

Most owners schedule jobs themselves. They keep it in their head, or a notebook, or a spreadsheet they update at night.

That has to stop.

Who owns the schedule.

One person. Same person every day. Could be the same person who handles the phone if you are small. Could be a different person if you are bigger.

Where the schedule lives.

One place that everyone can see. Pick one of these.

- Google Calendar shared with the team.
- A whiteboard in the shop.
- A simple app like Jobber, HouseCall Pro, or ServiceTitan.

Pick one. Use only that one. No side notes. No second list in your phone.

Three schedule rules.

Rule 1. Schedule is locked the night before.

By 6pm the day before, the next day is set. Names, times, addresses, job notes. After 6pm, the only changes come from the field, not from new customers.

Rule 2. Buffer time is built in.

Every day has one open 2-hour block. This is for the surprise job, the running-late job, or the rebook. If a day fills with no buffer, the scheduler tells the next caller "next available is Tuesday."

Rule 3. No same-day promises without a buffer check.

The phone person does not promise "we can be there today" without checking with the scheduler. The scheduler is the only one who says yes.

SOP #2 / CONTINUED

Schedule Management.

The morning meeting.

Every morning at the same time, the scheduler reviews the day with the field team. Ten minutes. Standing up. No chairs.

- Who is going where.
- What materials they need.
- Any customer notes worth knowing.
- Confirmed end times for each job.

After the meeting, the schedule is final until the field reports back.

The end-of-day call.

Each field tech calls the scheduler when their last job is done. Scheduler updates the schedule. Marks the job complete. Notes anything for tomorrow.

If a tech does not call by 5pm, scheduler calls them. Every day. No skipping.

What goes to the owner.

Owner sees the schedule. Owner does not change it. The owner only steps in if:

- A big new customer asks for the owner by name.
- A job needs to be re-scoped because it is much bigger than booked.
- A tech walks off a job.

TEST IT

Pick a Tuesday. Stay home.

Tell the scheduler you are not available before lunch. See if Monday night the schedule still gets built. See if Tuesday morning the meeting still happens. If it does, the SOP is holding.

SOP #3

Field Status Updates.

The third reason owners cannot leave. They do not know what is happening at the job site. So they drive by. They call. They worry.

This SOP fixes that with three check-ins per tech per day. Not five. Not ten. Three.

Check-in 1. Start of day (7am to 8am).

Every tech texts the scheduler one of these. One line. Ten seconds.

- "On the way to [job address]."
- "Stuck at the shop, ETA [time]."

Check-in 2. Mid-day.

When the tech finishes their first job, they text the scheduler.

- Job number or address.
- Status. Done, more time needed, or problem.
- ETA to next job.

If status is "problem," the scheduler decides.

- Small problem. Need a part, or a customer add-on under \$300. Scheduler handles.
- Big problem. Customer mad, mold found, job is double the size. Scheduler calls the lead tech or shop foreman. Not the owner.

Check-in 3. End of day.

Each tech calls in their last job. Scheduler asks four questions.

- Was it closed clean?
- Did the customer pay?
- Did you sell any add-on?
- Anything broken to fix tomorrow?

Two-minute call. Done.

SOP #3 / CONTINUED

Field Status Updates.

The daily report to the owner.

At the end of every day, scheduler sends the owner a one-page report.

- Jobs done today. Count.
- Jobs that ran over. Which ones, why.
- Money collected today. Rough number.
- Tomorrow's start time.

The owner reads it. The owner does not call back. The owner only steps in if a number looks off three days in a row.

THE BIG IDEA

Three check-ins replace a day of worry.

When you know where every tech is and how every job is going, you do not need to drive by. You do not need to call. Knowing is the cure for worry. The check-ins are knowing.

Common mistake.

Owners try to read every check-in themselves. Do not. The check-ins go to the scheduler. The scheduler boils them down into the one-page end-of-day report. The owner reads the report. That is it.

If you read every text from every tech all day, you are still the engine. The whole point is to stop being the engine.

PART 4

The Decision Tree.

Print this page. Put it on the wall in your shop. Walk every team member through it once. That is the whole training.

Two columns. Left side is what the team handles without calling you. Right side is what gets the owner on the phone. Change the dollar numbers to fit your business. The list itself does not change much.

TEAM HANDLES	OWNER HANDLES
New job booked under \$5,000	New job booked over \$5,000
Customer wants to reschedule	Customer wants a refund
Quote change under \$500	Quote change over \$500
Standard parts order under \$1,000	Parts order over \$1,000
Tech is sick (lead tech covers)	Tech walks off a job
Job runs two hours over	Job runs a full extra day
Add-on sold mid-job	Customer says "I will sue"
Customer complaint about timing	A truck accident
A truck needs a small repair	A bounced check from a customer
	Big new customer asks for you by name

TRAIN THE TEAM. Walk every person through this list once. Then test them. Have a team member bring you a "team handles" problem on purpose. See if they catch the mistake. If they do, you are ready.

PART 5

The 30-Day Install Plan.

This is the schedule. About 60 to 90 minutes a day. Most of the work is in the first two weeks.

Week 1 you see the problem. You track every minute. You do not change anything yet.

Week 2 you set up the phone and the schedule SOPs.

Week 3 you set up the field SOP and the decision tree.

Week 4 you test. You take a half-day. Then a full day. Then you score yourself on the Friday Test. If you pass, you book the week off.

ONE RULE

Do the steps in order.

Do not skip ahead to Week 3 because you are excited. Do not stay in Week 1 because you are scared. One day at a time. Trust the plan.

WEEK 1 / DAYS 1 TO 7

See the problem.

Goal. Track every minute. Do not change behavior. See where your week goes.

DAY 1 MONDAY	Read this whole guide cover to cover. No tasks. Just read. Mark the parts that hit hardest.
DAY 2 TUESDAY	Print the 10-Hour Audit sheet from Part 2. Start tracking your day. Be honest.
DAY 3 WEDNESDAY	Keep tracking. Do not change behavior yet. The data is only useful if it is real.
DAY 4 THURSDAY	Keep tracking. In the margin of the sheet, note who could do each task instead of you.
DAY 5 FRIDAY	Keep tracking. At end of day, total your sheet. Add up each row.
DAY 6-7 WEEKEND	Read your totals. Circle the three biggest time wasters that are not the actual trade work.

WEEK 2 / DAYS 8 TO 14

Phone and schedule.

Goal. Get SOP #1 and SOP #2 running. Phone time should drop by Friday.

DAY 8 MONDAY	Pick your phone person. If you do not have one, sign up for an answering service today. Cost is \$200 to \$500 a month.
DAY 9 TUESDAY	Sit with your phone person for one hour. Walk through SOP #1. Print it. Tape it to their desk.
DAY 10 WEDNESDAY	Test the phone SOP. Call your own business three times that day from a phone they will not recognize. See if the rules hold.
DAY 11 THURSDAY	Pick your schedule person. Could be the same as phone if you are small.
DAY 12 FRIDAY	Sit with your schedule person for one hour. Walk through SOP #2. Pick where the schedule lives. Move it there.
DAY 13-14 WEEKEND	Look at your audit again. Has the phone time started to drop? It should be lower by Friday.

WEEK 3 / DAYS 15 TO 21

Field and decisions.

Goal. Get SOP #3 and the Decision Tree running. Team starts to handle problems without you.

DAY 15 MONDAY	Walk through SOP #3 with your field team. Stand-up meeting before they go out. Fifteen minutes.
DAY 16 TUESDAY	Run the morning meeting yourself. Show them how. Have your scheduler take notes.
DAY 17 WEDNESDAY	Scheduler runs the morning meeting. You watch. Say nothing. Bite your tongue if you have to.
DAY 18 THURSDAY	Print the Decision Tree from Part 4. Post it in the shop. Walk every team member through it.
DAY 19 FRIDAY	Test the Decision Tree. Have one team member bring you a fake "team handles" problem on purpose. See if they catch it.
DAY 20-21 WEEKEND	Quiet weekend. Do not call your team. Do not check the schedule. See how Saturday and Sunday go.

WEEK 4 / DAYS 22 TO 30

Test and go.

Goal. Take a half-day. Then a full day. Then book the real week off.

DAY 22 MONDAY	Half-day off. Leave at noon. Phone goes to your phone person. Do not check it. Note what happens.
DAY 23 TUESDAY	Full day off. Stay close to home. Do not check phone or text. End of day, read the scheduler's report.
DAY 24 WEDNESDAY	Back at the office. Review what broke on your day off. Fix the SOP if needed. Small fixes only.
DAY 25 THURSDAY	Half-day off. Drive an hour away. No phone. Listen to music. Eat a long lunch.
DAY 26 FRIDAY	Take the Friday Test on the next page. Score yourself. Be honest.
DAY 27-30 FINAL DAYS	If you scored 5 or higher, book your week off. Tell every key customer the dates. Update voicemail. Set out-of-office. Pack a bag. Leave town.

PART 6

The Friday Test.

Take this test every Friday for the rest of your business life. One point for each yes. The score tells you if the systems are holding or if you are slipping back into the work.

- | | | |
|---|--|--------------------------|
| 1 | Did the phone get answered all week without me? | ☐ |
| 2 | Did the schedule get built and run without me? | ☐ |
| 3 | Did at least one customer problem get handled without me? | ☐ |
| 4 | Did I drive past a job site fewer than three times this week? | ☐ |
| 5 | Did the team morning meeting happen without me? | ☐ |
| 6 | Did money get collected without me asking who paid? | ☐ |
| 7 | Did at least one full day go by where I did not check my work phone? | ☐ |

SCORE	WHAT IT MEANS
0 to 3	You are still the engine. Run the SOPs another week before testing again.
4 to 5	You are getting close. Run one more week. Test again Friday.
6 to 7	You can take the week off. Book it. Tell the team.

PART 7

Two ways forward.

You can do everything in this guide on your own. Many owners have. It works. It also takes time. Here is the honest side-by-side.

	DO IT YOURSELF	DONE WITH EAC
Time to install	30 days if you do every step	30 days. Same SOPs.
Cost	Free. This guide.	\$1,000 up front. \$3,000 on day 31 only if you have 10 hours back. 14-day refund window.
Risk	You stop halfway. Most owners do.	Low. We hold you to the schedule.
The SOPs	Generic. Built for the average owner.	Custom-fit to your team and your trade.
Weekly live session	None.	60 minutes a week with John and other owners.
Direct access	None.	Text John direct for the full 30 days.
Voice-Print of your business	Not included.	Built day one. Your team sounds like you on the phone.
Founders 50 rate locked	Not available.	Lifetime rate for the first 50 members.

WHO DIY IS RIGHT FOR. You like to build it yourself. You have 60 to 90 minutes a day for 30 days. You do not mind starting over if a piece does not click.

WHO EAC IS RIGHT FOR. You have tried before and stopped. You want someone watching the install. You want to take the week off this quarter, not next year.

ONE LAST THING

Build a business you do not need to retire from.

The reason you started this business was not to be a slave to a phone. It was to build something. To make money. To have a life.

You can have all three. You just need rules that work without you.

Do the 30 days. Take the week off. Then take another one. Then build the business you do not need to retire from.

READY TO TALK?

Book a 30-minute call.

We will look at your audit together. No pitch. No pressure. If Win Back Your Week is a fit, we will say so. If not, we will tell you that too.

winbackyourweek.com

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**We find the money your business
is already making but not keeping.**

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