

OPERATIONS BINDER

Bramblewood Comfort Systems, Inc.

Residential & light-commercial HVAC · Springfield, MO area (fictional)

Prepared for	Dale Kessler, Owner
Revenue	≈ \$2.04M (owner estimate, prior year)
Headcount	11 incl. owner + outside bookkeeper
Exit timeline	Owner plans to sell in ~24 months
Date	October 26, 2026
Version	v1.0 — draft for owner review

SAMPLE — fictional company. Bramblewood Comfort Systems and all people, vendors, and figures in this binder are invented to demonstrate the format. It was generated from the 52-minute voice-memo transcript included with this sample.

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1 Summary & How to Use This Binder

Bramblewood is an ~85% residential / 15% light-commercial HVAC contractor. About 60% of revenue is equipment replacement; the rest is service and a maintenance club. Day-to-day service runs without the owner. Replacement sales, pricing, discount approval, weekly numbers, banking, the city mechanical license, and several owner-held logins do not. This binder documents how the company runs today and lists what must move off the owner before a sale.

How to use this binder

- Start with the Owner-Dependency Register — it is the transition to-do list.
- Each SOP names a role, not a person; the Role Map shows who fills each role today.
- Steps marked OWNER are done only by the owner today and are the first candidates to delegate.
- Open Questions (last section) must be answered by the owner before this binder is final.
- Review quarterly; update the version number and date on the cover.

Top transferability risks

1. All replacement sales (~60% of revenue) are run and priced by the owner.
2. Pricing markup is partly kept 'in the owner's head'.
3. Owner is the sole bank signer and holds the city mechanical contractor license.
4. Housecall Pro owner account and Google Business Profile sit on the owner's personal accounts; domain ownership is unknown.
5. Warranty registrations have been missed, reducing some parts warranties from 10 to 5 years.

At a glance

12	18/79	5	9
SOPs documented	steps owner-only today	high-risk dependencies	open questions

2 Role Map

Roles are what the SOPs refer to. People fill roles today; a buyer can re-staff roles without rewriting procedures.

Role	Today	Reports to	Responsibilities	Backup	Dependency note
Owner / President	Dale Kessler Founder	—	• All replacement in-home estimates and pricing • Discounts over ~\$200; purchases over \$1,000 • Monday KPI review • Bank signer; city mechanical license holder • Supplier relationship (Ozark Comfort Supply)	None today	Single point of failure for sales, pricing, banking, licensing.
Office Manager	Tammy Ruiz 11 yrs	Owner	• Accounts payable • Equipment ordering, permits, install scheduling • Warranty registrations • AR follow-up at 30/60 days • License, cert & insurance renewal calendar • Club spiff tracking	CSR/ Dispatcher (scheduling only)	Holds most logins; natural successor for weekly numbers.
CSR / Dispatcher	Keisha Grant 3 yrs	Office Manager	• Answer and book calls • Run the dispatch board • Book replacement estimates	Office Manager	Calls owner to decide bumps in peak season.
Lead Service Tech	Marco Delgado 9 yrs (15 in trade)	Owner	• Complex and commercial calls • Callbacks • New-tech training and ride-alongs • Consolidates truck-stock usage	None	Owner sees as future Service Manager; possible license qualifier.
Service Technician (×2)	Jordan; Tyler Tyler ≈ 1 yr	Lead Service Tech	• Diagnostics and repairs • Collect payment on site • Offer maintenance club • Flag replacement leads	Lead Service Tech	—
Install Lead	Brent Hollis (not stated)	Owner	• Run install crew • Before/after photos, startup sheet • Enter serial numbers • Collect final payment (sometimes)	None	Paperwork gaps drive missed warranty registrations.
Installer (×2)	Luis; Cody (not stated)	Install Lead	• Equipment installation	—	—
Bookkeeper (outsourced)	Linda Park, Park Bookkeeping (not stated)	Owner	• QuickBooks Online (Thursdays) • Bank reconciliation • Runs payroll in Gusto	None	External; confirm engagement terms transfer.

3 Owner-Dependency Register

Everything that depends on the owner today, ranked by risk, with the proposed successor and target (months from binder date). This is the transition plan.

ID	Dependency	Today	Risk	Mitigation	Successor / target
OD-01	Replacement sales (in-home estimates)	Owner runs all 8–12/week in peak; ~45% close (owner estimate).	High	Hire/develop a Comfort Advisor; owner ride-alongs; written SOP-04; track close rate by person.	Comfort Advisor (new) Month 6 hire, Month 12 independent
OD-02	Pricing / markup	Spreadsheet on owner laptop; markup partly judgment.	High	Write markup rules into the price book; move file to shared drive; quarterly price review.	Office Manager + Comfort Advisor Month 3
OD-03	Discount & purchase approvals	Everyone calls owner for discounts > ~\$200 and purchases > \$1,000.	Medium	Written approval matrix with dollar limits per role.	Office Manager / Service Manager Month 2
OD-04	Weekly KPI review	Owner pulls numbers to a whiteboard each Monday.	Medium	Office Manager produces KPI sheet weekly (SOP-12); keep 24 months of history.	Office Manager Month 1
OD-05	City mechanical contractor license	Held by owner.	High	Confirm qualifier rules with the city/attorney; Lead Service Tech to evaluate testing. (Licensing advice excluded — confirm with counsel.)	Lead Service Tech (possible) Decide by Month 6
OD-06	Bank signing authority	Owner is the only signer.	High	Discuss secondary signer / approval workflow with bank and advisors.	(owner decision) Month 3
OD-07	Owner-held digital accounts	Housecall Pro owner login and Google Business Profile on owner's phone/personal Gmail; domain ownership unknown (web vendor may hold it).	High	Move to company-owned email; add Office Manager as admin; confirm domain registrant; company password manager.	Office Manager Month 1
OD-08	Peak-season dispatch decisions	Dispatcher calls owner to decide which calls get bumped.	Medium	Written priority rules in SOP-02; Lead Service Tech decides exceptions.	Lead Service Tech Month 1
OD-09	Collections over 90 days	Escalates to owner.	Low	Define 90-day action in SOP-07.	Office Manager Month 2
OD-10	Disputed callbacks	Owner has final say.	Low	Goodwill credit limits per role in SOP-10.	Lead Service Tech Month 3
OD-11	Key supplier relationship	Owner has a 20-year relationship with the Ozark Comfort Supply rep.	Medium	Introduce Office Manager and successor to rep; get dealer terms in writing.	Office Manager Month 6
OD-12	New-tech training	Two-week ride-along; checklist exists only in Lead Tech's head.	Medium	SOP-11 checklist; sign-off form.	Lead Service Tech Month 2

4 Systems & Vendors

No passwords are recorded here. Credentials belong in a company-owned password manager.

Systems & accounts

System	Category	Purpose	Account owner now	Admin after transition	Transfer notes
Housecall Pro	Field service / CRM	Booking, dispatch board, repair price book, proposals, invoicing, texts	Owner (owner login on phone)	Office Manager	Move owner account to company email; export job history.
QuickBooks Online	Accounting	Books, reconciliation	Owner + Bookkeeper	Bookkeeper / buyer	Confirm primary admin is a company email.
Gusto	Payroll (system only — no payroll advice)	Payroll run by bookkeeper	Bookkeeper	Bookkeeper / buyer	Add a second company admin.
Pricing spreadsheet	Pricing	Replacement pricing (equipment × markup + labor + kit + permit)	Owner laptop	Office Manager	Move to shared drive; see OD-02.
Google Business Profile	Marketing	Reviews, map listing, leads	Owner's personal Gmail	Company account	Add company owner; see OD-07.
Website + domain	Marketing	Leads	Riverbend Web (vendor) — domain registrant unknown	Company	Confirm registrant; move domain to company account.
VoIP phone system	Phones	Main line	Office Manager knows account	Office Manager	Record provider name and number ownership.
Manual J software	Sales tool	Load calcs on non-standard homes	Owner	Comfort Advisor	Name of product not stated.
Permit portals (city + county)	Compliance	Pull install permits	Office Manager	Office Manager	Confirm accounts are in company name.
Renewal calendar	Compliance	Business license, EPA certs, insurance dates	Office Manager	Office Manager	Export into binder appendix.

Vendors

Vendor	Category	Relationship owner	Terms	Transfer notes
Ozark Comfort Supply	Equipment distributor (primary brand)	Owner (rep: Gary, ~20 yrs)	(confirm in writing)	See OD-11.
Midstate Parts	Parts & filters	Office Manager	(confirm)	Weekly Friday order.
Park Bookkeeping (Linda Park)	Bookkeeping & payroll processing	Owner	Weekly (Thursdays)	Confirm engagement continues post-sale.

Vendor	Category	Relationship owner	Terms	Transfer notes
Riverbend Web	Website	Owner	Monthly	Domain ownership unknown — OD-07.
Hargrove Insurance	Insurance broker	Owner / Office Manager	(confirm)	—
Enterprise Fleet	Vehicle leases (2 vans)	Owner	(confirm)	Lease assignment rules (confirm).
Consumer financing lender program	Customer financing	Owner / Office Manager	(confirm)	Lender name not stated.
Indeed	Recruiting	Owner	Pay-per-post	—

5 Standard Operating Procedures

Each SOP names a role, a trigger, the steps, and how to check the work. Steps marked OWNER are done only by the owner today — see the Owner-Dependency Register.

SOP	Title	Role	Frequency	Owner-only steps
SOP-01	Inbound Call Intake & Booking	CSR / Dispatcher	All day	1
SOP-02	Dispatch & Daily Board	CSR / Dispatcher	Daily	1
SOP-03	Service Call (Diagnostic to Payment)	Service Technician	Per call	0
SOP-04	Replacement Estimate & Proposal	Owner (target: Comfort Advisor)	8–12 per week in peak (owner estimate)	7
SOP-05	Install Handoff & Installation Workflow	Office Manager + Install Lead	Per sold job	0
SOP-06	Maintenance Club: Sales, Renewals & Tune-Ups	Office Manager	Ongoing	0
SOP-07	Invoicing, Payments & Collections	Office Manager	Daily / weekly	2
SOP-08	Warranty Registration & Claims	Office Manager	Per install	0
SOP-09	Purchasing, Truck Stock & Inventory	Office Manager	Weekly	1
SOP-10	Callbacks & Customer Complaints	Lead Service Tech	As needed	1
SOP-11	New Technician Hiring & Onboarding	Owner (target: Lead Service Tech)	As needed	2
SOP-12	Weekly KPI Review	Owner (target: Office Manager)	Weekly	3

SOP-01

Inbound Call Intake & Booking

PURPOSE	ROLE	TRIGGER	FREQUENCY
Answer every call the same way and book it correctly the first time.	CSR / Dispatcher	Phone rings or web request arrives	All day
TOOLS	HANDS OFF TO	KPIS	SOURCE
Phone system, Housecall Pro	SOP-02 Dispatch	Calls booked ÷ calls answered; Club-member share of calls	Memo 2, 0:00–2:30

Steps

#	Step	Role
1	Answer: "Thanks for calling Bramblewood, this is [name]."	CSR
2	Capture name, address, phone, and the problem (no heat, no cool, noise, other).	CSR
3	Ask if they are a club member; members get priority and 15% off repairs.	CSR
4	Ask the approximate age of the system.	CSR
5	If caller reports a gas smell: tell them to leave the home and call the gas utility first. Do not troubleshoot.	CSR
6	Quote the diagnostic fee: \$89 standard, \$149 after hours; waived if the repair is done.	CSR
7	Book the job in Housecall Pro and place it on the dispatch board.	CSR
8	Confirm the automatic text confirmation was sent.	CSR
9	Discount requests over ~\$200: route to approver (today: owner).	OWNER today

Quality checks

- ☐ Every job has address, phone, problem type, member status.
- ☐ Fee quoted matches the fee table (move from sticky note into this SOP).

SOP-02

Dispatch & Daily Board

PURPOSE	ROLE	TRIGGER	FREQUENCY
Assign calls so the right tech arrives on time.	CSR / Dispatcher	Booked job	Daily
TOOLS	HANDS OFF TO	KPIS	SOURCE
Housecall Pro dispatch board	SOP-03 Service Call	Same-day completion rate; Jobs moved per week	Memo 2, 2:30–4:00

Steps

#	Step	Role
1	Assign north-side calls to Service Tech A and south-side calls to Service Tech B.	Dispatcher
2	Assign complex and commercial calls to the Lead Service Tech.	Dispatcher
3	Give club members priority on the board.	Dispatcher
4	Assign callbacks to the Lead Service Tech, or have Lead Tech call the original tech.	Dispatcher
5	Peak season: when the board is over capacity, decide which calls move (today: call owner).	OWNER today
6	Notify moved customers by phone and update the job time.	Dispatcher

Quality checks

- ☐ No unassigned jobs at 4 PM for next day.
- ☐ Every moved job has a customer contact note.

SOP-03

Service Call (Diagnostic to Payment)

PURPOSE	ROLE	TRIGGER	FREQUENCY
Deliver a consistent diagnostic visit, options, and payment on site.	Service Technician	Dispatched job	Per call
TOOLS	HANDS OFF TO	KPIS	SOURCE
Housecall Pro tablet + flat-rate repair price book	SOP-04 (replacement lead), SOP-06 (club), SOP-07 (invoice)	Average ticket; Club conversion rate	Memo 2, 4:00–9:00

Steps

#	Step	Role
1	Arrive, introduce yourself, confirm the problem with the customer.	Tech
2	Diagnose the system. Technical and safety procedures: per manufacturer instructions, code, and licensed-technician judgment — not documented here.	Tech
3	Present good-better-best repair options from the flat-rate price book.	Tech
4	If the system is 12+ years old or repair is over ~\$1,500, offer a replacement estimate visit.	Tech
5	Log the replacement lead so the CSR books it (SOP-04).	Tech
6	Collect payment: card on tablet, or check (photograph the check).	Tech
7	Members: offer renewal. Non-members: offer the club (\$199/yr, two tune-ups).	Tech
8	Close the job in Housecall Pro so the invoice sends automatically.	Tech

Quality checks

- ☐ Club offered on 100% of non-member calls (currently inconsistent).
- ☐ Check photos attached to job.

SOP-04

Replacement Estimate & Proposal

PURPOSE	ROLE	TRIGGER	FREQUENCY
Run in-home replacement estimates and produce priced proposals.	Owner (target: Comfort Advisor)	Replacement lead booked (tech turnover, website, Google, Home Show)	8–12 per week in peak (owner estimate)
TOOLS	HANDS OFF TO	KPIS	SOURCE
iPad + Housecall Pro proposal template, Pricing spreadsheet, Manual J software, Financing lender program	SOP-05 Install	Close rate (owner est. ~45%); Average replacement ticket	Memo 3, 0:00–6:30

Steps

#	Step	Role
1	CSR books a 90-minute estimate block.	CSR
2	Inspect ductwork, electrical, venting; photograph and measure.	OWNER today
3	Size the system; run a full Manual J for any non-standard home.	OWNER today
4	Price each option: equipment cost × markup + labor hours × rate + materials kit + permit.	OWNER today
5	Apply markup per written rules (rules not yet documented — see Open Questions).	OWNER today
6	Present three options on the iPad template; offer financing at the table.	OWNER today
7	On signature, collect a 30% deposit.	OWNER today
8	Hand off per SOP-05 (photos + notes to Install Lead, order to Office Manager).	OWNER today

Quality checks

- ☐ Every proposal has photos and measurements attached.
- ☐ Margin on each sold job matches markup rules.

SOP-05

Install Handoff & Installation Workflow

PURPOSE	ROLE	TRIGGER	FREQUENCY
Move a sold job to a completed, inspected install without lost details.	Office Manager + Install Lead	Signed proposal + deposit	Per sold job
TOOLS	HANDS OFF TO	KPIS	SOURCE
Housecall Pro, City and county permit portals, Manufacturer startup checklist	SOP-08 Warranty, SOP-06 Club	Days from sale to install; Inspection first-pass rate	Memo 3, 6:30–13:20

Steps

#	Step	Role
1	Seller posts photos and job notes to the Housecall Pro job (replaces texting the Install Lead).	Seller
2	Order equipment from Ozark Comfort Supply.	Office Manager
3	Pull permit (city portal for Springfield; separate county portal).	Office Manager
4	Schedule install date with the customer.	Office Manager
5	Install crew takes before photos, installs, takes after photos.	Install Lead
6	Perform startup per manufacturer checklist; complete the startup sheet.	Install Lead
7	Enter all serial numbers in Housecall Pro the same day.	Install Lead
8	Schedule inspection.	Office Manager
9	Collect final payment on site, or Office Manager invoices.	Install Lead / Office Manager
10	Enroll customer in first-year club free (current promotion).	Office Manager

Quality checks

- ☐ Serials entered before crew leaves site.
- ☐ Startup sheet + photos attached to job.
- ☐ Inspection passed and recorded.

SOP-06

Maintenance Club: Sales, Renewals & Tune-Ups

PURPOSE	ROLE	TRIGGER	FREQUENCY
Grow recurring revenue and keep members renewed.	Office Manager	Club sale, new install, or renewal date	Ongoing
TOOLS	HANDS OFF TO	KPIS	SOURCE
Housecall Pro, Spiff tracking sheet	SOP-12 KPIS	Active members; Renewal rate; Free-year → paid conversion	Memo 2, 7:00–8:30; Memo 3, 12:30

Steps

#	Step	Role
1	Club price: \$199/year, includes two tune-ups, priority service, 15% off repairs.	All
2	Techs offer the club on every non-member call.	Tech
3	Record each tech club sale on the spiff sheet (\$25 per sale).	Office Manager
4	Enroll new-install customers free for year one.	Office Manager
5	Schedule the two tune-ups per member per year.	CSR
6	Offer renewal on site at member visits.	Tech

Quality checks

- ☐ Member count reconciles with Housecall Pro list monthly.

SOP-07

Invoicing, Payments & Collections

PURPOSE	ROLE	TRIGGER	FREQUENCY
Get paid on every job and follow up consistently.	Office Manager	Job closed	Daily / weekly
TOOLS	HANDS OFF TO	KPIs	SOURCE
Housecall Pro, QuickBooks Online, Bank	SOP-12 KPIs	AR over 30 days (\$); Days sales outstanding	Memo 2, 9:00–10:30; Memo 4, 8:30

Steps

#	Step	Role
1	Invoice sends automatically when the job is closed in Housecall Pro.	System
2	Bookkeeper reconciles payments to the bank every Thursday.	Bookkeeper
3	At 30 days unpaid: Office Manager calls the customer.	Office Manager
4	At 60 days: send the collections letter.	Office Manager
5	At 90 days: decide next action (today: owner decides).	OWNER today
6	Pay vendors; bank payments require the sole signer (today: owner).	OWNER today

Quality checks

- ☐ AR aging reviewed weekly.

SOP-08

Warranty Registration & Claims

PURPOSE	ROLE	TRIGGER	FREQUENCY
Register every install within the manufacturer window to protect 10-year parts coverage.	Office Manager	Serial numbers entered (SOP-05)	Per install
TOOLS	HANDS OFF TO	KPIS	SOURCE
Housecall Pro, Manufacturer warranty portal	—	Registrations on time (%)	Memo 3, 10:00–11:30

Steps

#	Step	Role
1	Each Friday, list installs from the past 7 days with serials.	Office Manager
2	Register each unit; the manufacturer requires registration within 60 days or parts coverage drops from 10 to 5 years.	Office Manager
3	Chase any missing serials from the Install Lead the same day.	Office Manager
4	Save the registration confirmation to the job.	Office Manager
5	For warranty parts claims: process through the distributor (process not described — see Open Questions).	Office Manager

Quality checks

- ☐ Zero installs older than 45 days without a registration confirmation.

SOP-09

Purchasing, Truck Stock & Inventory

PURPOSE	ROLE	TRIGGER	FREQUENCY
Keep vans stocked without over-buying.	Office Manager	Weekly (Friday); equipment per sold job	Weekly
TOOLS	HANDS OFF TO	KPIS	SOURCE
Truck stock list, Midstate Parts, Ozark Comfort Supply	—	Parts spend ÷ service revenue	Memo 4, 2:30–4:00

Steps

#	Step	Role
1	Each tech records parts used on the truck stock list every Friday.	Tech
2	Lead Service Tech consolidates the lists.	Lead Tech
3	Office Manager orders replenishment from Midstate Parts.	Office Manager
4	Purchases over \$1,000 require approval (today: owner).	OWNER today
5	Count warehouse inventory at year end (consider quarterly).	Office Manager

Quality checks

- ☐ Truck stock list moved from laminated sheet to a digital form (recommended).

SOP-10

Callbacks & Customer Complaints

PURPOSE	ROLE	TRIGGER	FREQUENCY
Resolve repeat problems fast and consistently.	Lead Service Tech	Customer calls within 30 days on the same problem	As needed
TOOLS	HANDS OFF TO	KPIS	SOURCE
Housecall Pro (CALLBACK tag)	SOP-12 KPIS	Callback rate by tech	Memo 2, 10:30–12:45

Steps

#	Step	Role
1	CSR tags the job "CALLBACK" in Housecall Pro — every time.	CSR
2	No charge to the customer for a qualifying callback.	CSR
3	Lead Service Tech runs the callback, or calls the original tech first.	Lead Tech
4	Record root cause on the job.	Lead Tech
5	Disputes that escalate: final decision (today: owner).	OWNER today

Quality checks

- ☐ Callback tag used on 100% of callbacks (currently 'sometimes').

SOP-11

New Technician Hiring & Onboarding

PURPOSE	ROLE	TRIGGER	FREQUENCY
Make tech hiring and training repeatable without one trainer's memory.	Owner (target: Lead Service Tech)	Open tech position	As needed
TOOLS	HANDS OFF TO	KPIS	SOURCE
Indeed	—	Days to independent; 90-day retention	Memo 4, 4:00–5:30

Steps

#	Step	Role
1	Post the opening on Indeed.	OWNER today
2	Interview candidates.	OWNER today
3	Lead Service Tech does a one-day ride-along with finalists.	Lead Tech
4	Confirm EPA certification is on file; add renewal to the calendar.	Office Manager
5	New tech rides with the Lead Service Tech for two weeks.	Lead Tech
6	Lead Tech signs off before the new tech gets their own van (checklist to be written — Open Questions).	Lead Tech

Quality checks

- ☐ Signed onboarding checklist in each tech file.

SOP-12

Weekly KPI Review

PURPOSE	ROLE	TRIGGER	FREQUENCY
Produce the weekly numbers without the owner and keep a history buyers can review.	Owner (target: Office Manager)	Every Monday	Weekly
TOOLS	HANDS OFF TO	KPIS	SOURCE
Housecall Pro reports, Bank, KPI spreadsheet (new)	—	Revenue/week; Calls/week; Avg ticket; Club members; Close rate	Memo 4, 0:00–2:30

Steps

#	Step	Role
1	Pull weekly sales, call count, and average ticket from Housecall Pro.	OWNER today
2	Pull cash from the bank.	OWNER today
3	Record club member count, estimates run, and estimates closed.	OWNER today
4	Enter all figures in the KPI spreadsheet (replaces whiteboard) and keep every week.	Office Manager
5	Review with owner/manager team; note actions.	Owner

Quality checks

- ☐ 52 consecutive weeks of KPI history by month 12.

6 Open Questions for Owner Review

These items were missing or unclear in the recordings. Nothing was guessed; answer these during your review call and the binder will be updated.

#	Reference	Question	Answer
1	SOP-04 / OD-02	What markup rules do you apply, and when do you change them?	
2	SOP-04	Which Manual J software and which consumer-financing lender do you use?	
3	SOP-01 / OD-03	Exact discount approval threshold — is it \$200?	
4	SOP-07	What do you decide at 90 days past due (payment plan, collections agency, write-off)?	
5	SOP-08	How are warranty parts claims processed with Ozark?	
6	SOP-11	What does the Lead Tech check before a new tech gets a van? (We'll draft the checklist from a 10-min recording with him.)	
7	Systems	Who is the registrant of the website domain? Monthly costs and renewal dates for each system?	
8	Role map	Tenure for Install Lead, installers, and bookkeeper?	
9	Summary	Confirm last-year revenue (owner said ≈ \$2.04M; bookkeeper has the exact figure).	

7 Scope & Exclusions

This binder documents how the business operates. It does not contain or replace business valuation, legal, tax, payroll, licensing, or employment advice, or safety-critical technical procedures (gas, electrical, refrigerant). Items that touch those areas are flagged for the owner's licensed advisors.

Review cadence: quarterly, and before any buyer data-room upload. Update the version and date on the cover.