

FIRST MOTION SYSTEMS

The First 90 Days of a Plumbing Business

How to build the marketing, operations and financial systems required to grow correctly

A practical guide for owner-operators preparing to build a profitable service company

Growth is not just more leads. It is the ability to turn demand into completed, profitable work without losing control of the customer experience, the schedule or the cash.

YOU HANDLE THE JOBS.

WE HELP WITH THE WORK AROUND THEM.

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Growth should create capacity, not chaos

A new plumbing company can win work quickly and still build an unhealthy business. Calls can go unanswered. Estimates can sit. Jobs can be scheduled without clear scope. Technicians can finish work without the documentation needed to invoice. Revenue can rise while cash and profit remain unclear.

The solution is a growth system: a connected set of marketing, intake, scheduling, job management, billing and reporting processes. Each part should answer a clear business question and hand clean information to the next part.

The 90-day objective

By the end of the first 90 days, the owner should be able to answer five questions with evidence:

1. Is demand repeatable, or was the first month driven by personal relationships and one-time jobs?
2. Are jobs priced profitably after labor, materials, travel, payroll burden and overhead?
3. Does cash arrive quickly enough to fund operations and future payroll?
4. Can the company deliver consistent quality without creating administrative chaos?
5. Is there enough recurring demand and cash to hire responsibly?

The central principle

Standardize first. Measure second. Automate third. A broken process does not become better when it is automated; it becomes faster and harder to see.

Build first	What it prevents	What it enables
One intake process	Missed details and slow replies	Faster booking and cleaner qualification
One job record	Scope confusion and lost photos	Accurate completion records and invoices
One pricing method	Guesswork and margin leakage	Repeatable estimating and job review
One weekly scorecard	Growth by instinct	Better decisions about marketing, pricing and hiring

Why early growth breaks trade businesses

The first constraint is rarely the owner's technical ability. It is the operating system around the work. More demand exposes every weak handoff between lead, job and cash.

Growth event	Without a system	Business consequence
More calls	The owner answers while driving or working	Slow response, lost jobs and distraction
More estimates	Quotes are built differently each time	Inconsistent pricing and weak follow-up
More jobs	Scope, approvals and notes live in texts	Callbacks, disputes and missed billing
More employees	Work depends on what the owner remembers	Low utilization and constant supervision
More marketing	Lead source and revenue are not connected	Budget moves toward activity, not results

What healthy growth looks like

- Every inquiry enters the same lead record, regardless of whether it came from a call, form, referral or advertisement.
- Every job has a written scope, authorization, schedule, completion record and payment status.
- The owner knows which services, customers and channels create contribution—not merely revenue.
- Routine reminders and handoffs happen automatically, while exceptions reach the owner for judgment.
- The first hire is triggered by sustained demand, capacity and cash—not owner exhaustion alone.

A useful way to think about automation

Routine work should move automatically. Owner judgment should stay in the loop when the scope changes, a permit or utility is involved, safety is at issue, the customer disputes completion, or an invoice would be based on incomplete information.

Example: An employee marking a task complete should not automatically trigger an invoice when the job could require a change order, final approval or documentation review. The system should prepare the next step and alert the owner when judgment is required.

Build one job-to-cash system

A growth system is strongest when the customer journey and the company's data follow the same path. Each stage below should have an owner, a required record and a next action.

Stage	Owner question	Minimum system requirement
Demand	Where did this opportunity come from?	Source captured for calls, forms, referrals and ads
Inquiry	Did we respond quickly and collect the right facts?	Lead record, contact details, service need and urgency
Qualification	Is this work we should pursue?	Service area, job type, decision-maker and timing
Estimate	Is the scope clear and approved?	Written scope, exclusions, price, authorization and follow-up date
Schedule	Who is doing what, where and when?	Assigned person, customer confirmation and job requirements
Service	What actually happened on site?	Time, materials, photos, notes and changes
Completion	Is the work complete and accepted?	Completion status, customer acknowledgment and exceptions
Invoice	Is the bill accurate and sent promptly?	Approved charges, payment terms and same-day workflow
Payment	Was cash collected?	Payment status, aging and follow-up sequence
Review	What should we improve or repeat?	Review request, referral prompt and job economics

The rule for every handoff

The next person—or the next automation—should never need to search through texts, email threads and memory to understand what happened. If the information is required to schedule, perform, bill or review the work, it belongs in the job record.

Foundation before acceleration

The first month is about becoming ready to operate, creating a dependable intake process and producing clean data from the first jobs. Do not confuse buying software with building a system.

Business and financial foundation

- Confirm licensing, insurance, bonding, tax, banking and bookkeeping requirements with qualified California professionals before performing or advertising regulated work.
- Separate business banking and payment processing from personal accounts.
- Create a chart of accounts that makes labor, materials, subcontractors, vehicles, software, marketing and owner draws visible.
- Define payment terms, deposits, material handling, after-hours pricing, travel zones and approval thresholds in writing.

Customer and operating foundation

- Set up one business phone number, one business email domain and one shared calendar.
- Create a standard inquiry form for calls and website leads.
- Create estimate, authorization, job-note, completion and invoice templates.
- Choose one field-service system and use it for every job from the beginning.

Marketing foundation

- Build or refine a mobile-first website with clear service-area and service-specific pages.
- Create and verify the Google Business Profile as a service-area business when appropriate.
- Ask every eligible customer for an honest review after successful completion.
- Start with relationships, referrals, property managers and local partners before adding broad paid demand.

First-month measure	What it tells the owner
Leads by source	Which relationships and channels are producing opportunities
Median response time	Whether demand is being handled while it is still active
Estimate-to-booking rate	Whether qualification, scope and pricing are working
Collected revenue	How much real cash the business produced
Days from completion to payment	Whether billing supports cash flow

Make the process repeatable

The second month is where the owner replaces assumptions with operating evidence. The goal is not simply to become busier. It is to learn which work should be repeated, which process steps are failing and where pricing needs to change.

Build demand deliberately

- Create dedicated pages for high-intent services such as emergency repair, water heaters, drain issues, repiping or property-management support—based on the work the company is actually equipped to deliver.
- Improve local search visibility with complete business information, service-area relevance, useful content and consistent reviews.
- Create a referral process for property managers, real estate professionals, restoration companies and adjacent trades.
- Follow up on unapproved estimates with a helpful, time-bound sequence rather than one manual reminder.

Build operational consistency

- Turn completed jobs into a starter price book using actual time, materials, complications and margin.
- Review jobs with callbacks, scope changes, long travel or slow payment and update the process.
- Define what can be scheduled without owner approval and what requires escalation.
- Create a weekly operating meeting, even if the owner is the only employee.

Weekly review question	Decision it should drive
Which lead sources produced collected revenue?	Continue, improve or stop a channel
Which job types produced the strongest contribution?	Change service focus or pricing
Where did jobs wait?	Fix intake, approval, scheduling or invoicing
Which work created callbacks or disputes?	Improve scope, documentation or training
What consumed owner time without creating value?	Standardize, delegate or automate

Add capacity with evidence

The third month is about deciding whether the company has earned the right to add payroll and paid demand. Marketing should expand only when the team can respond, schedule, perform and collect without damaging the customer experience.

When to test paid advertising

Paid search or social advertising can accelerate demand, but it should not be used to hide an unclear offer or broken intake process. Start with a narrow service, location and conversion goal. Track the lead through collected revenue, not just clicks or form submissions.

Before increasing ad spend	Evidence required
Clear offer	Specific service, location, customer and reason to choose the company
Conversion path	Fast mobile page, working form, tracked calls and clear next step
Response capacity	Someone can respond quickly during the advertised hours
Delivery capacity	The calendar can absorb new work without creating delays
Revenue attribution	Lead source can be connected to booked and collected revenue

When to prepare the first hire

- Document the tasks, service standards, escalation rules and job-closeout requirements before recruiting.
- Confirm workers' compensation, payroll registration, wage-and-hour procedures and new-hire reporting before the employee begins work.
- Build a simple onboarding scorecard: technical quality, documentation, customer communication, utilization, callbacks and safety.
- Treat the hire as a capacity investment with a measurable payback—not just relief for an exhausted owner.

The 90-day finish line

The company should end the period with a clean lead list, organized job records, current books, a reviewed price structure, visible marketing attribution, documented workflows and a deliberate decision to hire now, prepare for hiring, or wait.

Buy software when the business earns the need

The best early software stack is the smallest one the company will use consistently. Add tools when a measurable constraint appears, not because a platform has more features.

Timing	Capability	Purchase trigger	Examples
Start now	Field service	The first real jobs need scheduling, estimates, notes, invoices and payments	Jobber or Housecall Pro
Start now	Accounting	The business needs separate books, reconciliation and job-level visibility	QuickBooks Online
Start now	Business identity	The company needs domain email, calendar and shared files	Google Workspace
Start now	Business phone	Calls and texts must be separated from the owner's personal number	Google Voice or Quo
When needed	Call attribution	Multiple campaigns or channels make phone-source reporting unclear	CallRail
Before hiring	Payroll	A W-2 employee has a confirmed start date	Payroll service plus accountant review
With a field team	Photo documentation	Several technicians or property stakeholders need organized site records	CompanyCam or field-service tools
At scale	Enterprise operations	Dispatch complexity, multi-location reporting or call-center needs justify migration	ServiceTitan or comparable platform

Selection criteria

- Can the owner and future field team use it from a phone without extra administrative work?
- Does it preserve a clean record from lead through payment?
- Can data be exported or connected to reporting later?
- Does it replace a current problem, or merely create another system to maintain?
- Will the team actually adopt it every day?

Pricing note

Vendor pricing and plan features change frequently. Confirm current costs, user limits, contracts, payment-processing fees and integrations directly with each provider before purchasing.

Do not hire because the owner is busy for one week

A first field hire creates fixed obligations before it creates dependable capacity. The decision should be based on sustained demand, contribution, backlog, cash and process readiness.

Hiring gate	Evidence to look for
Sustained demand	At least six weeks of demand that can support roughly 120–140 billable technician hours per month, or signed recurring volume
Contribution	Expected technician revenue leaves at least 35% after loaded direct field costs under the company's actual model
Backlog	About two weeks of scheduled work without unacceptable customer delays
Cash reserve	Eight to twelve weeks of loaded payroll and field overhead available—not dependent on unpaid invoices
Process readiness	Job-to-cash steps, pricing, documentation and escalation rules are written and being used
Compliance readiness	Payroll, workers' compensation, employment procedures and reporting requirements are confirmed

Loaded labor is more than the wage

A technician's economic cost can include employer payroll taxes, workers' compensation, insurance, vehicle, fuel, tools, uniforms, paid travel, training, nonbillable time, overtime, callbacks and benefits. Compare revenue with the full loaded field cost, not with the hourly wage alone.

The owner should know

- Expected billable hours per paid hour.
- Effective collected revenue per technician hour.
- Direct field cost and contribution per technician hour.
- How many weeks of payroll the company can fund without new collections.
- Which job types the technician can perform without owner involvement.

Measure the business from lead to cash

A useful dashboard does not display every available number. It gives the owner enough evidence to decide what to improve next.

Business question	Primary metric	Why it matters
Are we creating demand?	Qualified leads by source	Separates useful opportunities from raw activity
Are we responding fast enough?	Median first-response time	Shows whether the company is losing active buyers
Are estimates working?	Estimate-to-booking rate	Tests qualification, scope, trust and pricing
Is the schedule productive?	Billable hours and utilization	Shows how much paid time creates revenue
Are jobs profitable?	Contribution by job type	Identifies services to grow, reprice or stop
Is cash healthy?	Collected revenue and days to payment	Prevents invoices from being mistaken for available cash
Is quality consistent?	Callbacks and customer issues	Protects reputation and reveals training needs
Is marketing paying back?	Collected revenue by source and acquisition cost	Connects budget decisions to business outcomes

A 30-minute weekly review

1. Compare the week's leads, booked jobs, completed jobs, invoices and collections.
2. Identify the single largest bottleneck between inquiry and payment.
3. Review one strong job and one weak job for pricing, scope, time and documentation.
4. Choose one process change, assign an owner and review it the following week.
5. Update the cash view before approving new software, advertising or payroll commitments.

The purpose of analytics

Analytics should not merely describe what happened. It should explain what the owner should investigate, why the number matters and which decision the evidence supports.

Automate the predictable, escalate the exceptional

Automation works best after the manual process has clear inputs, owners and exception rules. Begin with repetitive communication and administrative handoffs where the next action is known.

Automation	What it does	Human control to keep
Missed-call text-back	Acknowledges the caller and collects basic job details	Emergency and safety escalation
Lead routing	Creates a lead, captures source and assigns follow-up	Qualification for unusual work
Estimate follow-up	Reminds customers and creates a task when they respond	Discounts, scope changes and objections
Appointment reminders	Sends confirmations, arrival windows and preparation notes	Schedule exceptions and access issues
Job closeout	Prompts for photos, notes, materials and completion status	Review when scope or approval changed
Invoice workflow	Prepares or sends approved invoices and payment reminders	Final approval for exceptions and disputes
Review request	Invites satisfied customers to leave honest feedback	Suppress when an issue remains unresolved
Weekly reporting	Summarizes leads, jobs, cash and exceptions	Owner selects the corrective action

A practical maturity path

1. Manual but documented: the owner can explain the process and follow it consistently.
2. System-assisted: templates, required fields and reminders reduce memory-based work.
3. Automated handoffs: routine events trigger the next action without re-entry.
4. Exception-led management: the owner sees only what requires attention and receives an operating summary.

The test before automating

If the wrong action would create a safety issue, an inaccurate invoice, a customer dispute or a compliance problem, the workflow needs an approval step or a defined exception path.

Build the growth system around the work

First Motion helps service businesses connect demand generation, lead response, operating workflows and analytics so the owner can grow with more visibility and less administrative drag.

First Motion capability	What we help build	Business outcome
Demand generation	Conversion-focused websites, local SEO, answer-engine visibility and targeted ad campaigns	More qualified opportunities in the services and locations the company wants
Lead capture and response	Forms, call workflows, missed-call response, qualification and booking handoffs	Faster response and fewer opportunities lost
Operations automation	Scheduling, reminders, job-closeout, follow-up, invoicing handoffs and exception alerts	Less repetitive administration and more consistent execution
Analytics and reporting	Connected marketing, sales, operational and financial data with clear business logic	Better decisions about spend, pricing, capacity and growth
Ongoing optimization	Weekly or monthly review of results, bottlenecks and next actions	A system that improves as the company learns

Request a 90-Day Growth System Assessment

We will map how demand enters your business, how work moves from inquiry to payment, what information is missing and which improvements should come first. You will leave with a prioritized roadmap built around your actual services, team and growth goals.

Website: <https://firstmotionsystems.com>

Book a conversation: <https://calendly.com/chris-firstmotionsystems/30min>

Email: chris@firstmotionsystems.com

Phone: 831-915-0778

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Sources and important limitations

This guide is an operating framework, not legal, tax, accounting, insurance or employment advice.

Requirements and vendor pricing can change. Confirm decisions with qualified professionals and current provider documentation.

California Contractors State License Board. C-36 Plumbing Contractor classification; licensing, bond and contractor-law guidance. <https://www.cslb.ca.gov/>

California Employment Development Department. Employer registration and new-hire reporting guidance. <https://edd.ca.gov/>

California Department of Industrial Relations. Workers' compensation and employer requirements. <https://www.dir.ca.gov/>

Internal Revenue Service. Employer Social Security and Medicare tax guidance. <https://www.irs.gov/>

U.S. Small Business Administration. Break-even, cash-flow and employer planning resources. <https://www.sba.gov/>

Google Business Profile. Service-area business and Local Services Ads eligibility guidance. <https://support.google.com/business/>

Jobber and Housecall Pro. Field-service product capabilities and current plan information. <https://www.getjobber.com/> | <https://www.housecallpro.com/>

QuickBooks. Accounting and payroll product information. <https://quickbooks.intuit.com/>

ServiceTitan. Plumbing business benchmark and operating-content references. <https://www.servicetitan.com/>

Planning ranges

Any revenue, utilization, backlog, contribution or cash-reserve ranges in this guide are planning assumptions intended to support disciplined decision-making. They are not guarantees or universal industry benchmarks. Replace them with the company's actual data as early as possible.