

HANGING UP YOUR BOOTS AND HIRING LEADERSHIP



 Housecall Pro

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PART ONE

FOSTERING A SCALABLE MENTALITY

SECTION ONE

The thing about control

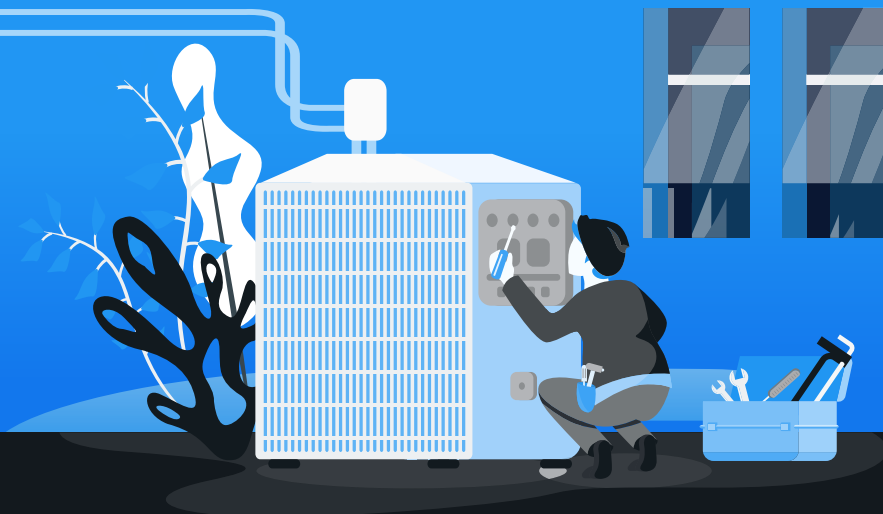
Control. It's probably why you started your own business in the first place. You wanted control over your time and your earnings. You wanted to control the way things get done. But as your business grows, maintaining this control is one of the trickiest bits to figure out. You can't do everything yourself.

It starts with those first hires: help in the office and the field. Someone else is talking to and even serving your customers instead of you.

Soon there are multiple people in the office and multiple techs in the field and, if you want to work on your business instead of in it, you'll need others to supervise your expanding team. Delegating more and more responsibility to others, it can feel as though control over your business is slipping through your fingers.

But people aren't the only reason you may feel a lack of control. The company itself can have power over you. Talking about a typical business owner in his book [The E-Myth Revisited](#), Michael E. Gerber writes:

The business that was supposed to free him from the limitations of working for somebody else actually enslaves him. Suddenly the job he knew how to do so well becomes one job he knows how to do plus a dozen others he doesn't know how to do at all.



WHAT YOU CAN DO

According to Gerber, “if your business depends on you, you don’t own a business—you have a job.” Is it possible then to truly have control over your business? We think so. But if you recognize yourself in any of what we just outlined, it’ll probably take some shifts in your perspective. That’s what this guide is about.

In short, here’s what we propose:

- Lead your company through a clear vision and values that keep all team members on the same page about what’s important.
- Build a management practice that helps you get the most out of each employee and maximizes your time to work on the business.
- Maintain control by systematizing everything.
- Create an organizational structure that inspires team members (who already fit your company culture and values) to keep growing with the company.
- Train these individuals to be leaders.

In what follows, we’ll detail each of these steps and how they can help you move away from being the boots on the ground and become the visionary that scales a truly great company.



SECTION TWO

Hone your company's vision and values

Per Brooks Petrus, COO of Housecall Pro, “Leadership is your ability to create a vision and marshal people towards that outcome. “It’s easier to trust employees that share your vision and values which, in turn, makes it easier to turn over responsibilities to them. When someone truly understands the purpose behind your business, they’ll act and make decisions through that same lens.

Every employee should be able to tell you the company’s core values, mission, or vision. They should be a part of your hiring process and found in your operation’s manual and even on your wall.



FOR EXAMPLE

Housecall Pro’s mission is to “**unlock the potential of every pro.**” And the company’s core values are:

- 1 **Champion the Pro**
- 2 **Fearless innovation**
- 3 **Do the work**
- 4 **Enjoy the journey**
- 5 **People matter**

Anyone who comes to work at Housecall Pro understands that they’re not just building and selling software. They’re creating tools and communities that enable pros to succeed. This drives each decision made internally.

Systematize everything

Beyond the vision, you can create control without doing everything yourself using systems and standards.

✓ Write up everything in an operations manual

Everything about how your company operates should be written out, such as:

- How to respond to customer inquiries
- How a service call flows
- What happens after a service call
- How your books are maintained

Use this manual when onboarding new employees and when issues arise on the job, encourage your team to consult it before asking you or other management.

[LEARN MORE ABOUT WRITING AN OPERATIONS MANUAL OR EMPLOYEE HANDBOOK HERE](#)

You can get creative. This manual doesn't have to be the standard thirty-page Word document, or you can have other materials that accompany it.

Some of our pros maintain a series of videos to demonstrate their processes. Others use private Facebook groups for their employees to keep these videos and documents and have a place to easily update their team.

✓ Keep track of exceptions

Operations consultant Erica Quigley explained that many companies can let exceptions to the rule get in the way of documenting and enforcing operational standards.

"Eighty percent of whatever you're doing is usually one way, but the reason people think it's different all the time is because they let all of these exceptions to their process overwhelm them, and these exceptions take more time than they're used to," she explained.

For Erica, a big part of helping a business run more efficiently is spotting these exceptions and building the exceptions into their regulated processes. You'll start to see that many of these exceptions are actually pretty common and can be prepared for.

✓ Encourage recommendations

Bolster your team's confidence and nurture their leadership tendencies by encouraging recommendations about how your business is run. Some owners make time in team meetings for brainstorming. Others use an idea box or just an open door policy.

Encourage them to consider whether their ideas align with the company's overall vision and values, as well as understand where these changes would fit into the operations manual.

✓ Test it out: take a day off

How do you know whether your systems are working? Everyone should be able to take a day off (including you) without things falling apart. Well-running systems make everyone replaceable in the short term. If you're constantly getting calls about how to handle situations, then your written-out operations aren't detailed enough or you haven't factored in enough common exceptions to the rules.

Besides making it easier for you to step away from micromanaging and finally be able to work on your business, the other advantage of these operational systems is that they help provide a consistent experience for your customers. They improve the quality of your service and help your business stand apart.



Be smart about how you manage your team

Learn how you can use in-app chat, drag-and-drop calendar scheduling, quick dispatching, and other simple Housecall Pro features to keep your techs organized. Book a demo and learn more about Housecall Pro's all-in-one home service business software now.

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Maintain a management practice

You have your vision and goals. You have your operational manual written out. So now your growing team is aware of what drives the company and the standards they should abide by. The structure is in place that provides invaluable direction to your team.

Management could be seen as simply overseeing this structure: making sure that your team abides by the operational standards, meets their performance goals, and continues to do what they need to do. But Brooks has a loftier vision. He believes that “management is the processes and practices that help people unlock their potential.”

Management practices are those that inspire. For instance, a practice of consistently reminding your team of the vision of the company and how they play an invaluable part in it — that’s inspiring. Here are a few practices recommended by Brooks and Mel Fairleigh, the Senior Vice President of People at Housecall Pro:

1 Show interest in their well-being

Find ways that demonstrate you care about your employees. “If you have that care,” Brooks explained, “and if you’re invested in their lives, then they’re going to do extraordinary things. Not for you, but with you.”

A place to start is taking an active interest in the long-term career goals of each employee. Help them set goals for themselves and create a strategy to meet those goals. (We’ll also talk about how creating and sharing an organizational chart with your team can help with this.)

2 Prioritize one-on-ones

“The one-on-one is the single most important thing you can do as a manager, and showing up is 80% of the deal,” Brooks explained.

One-on-one meetings are the foundation off of which everything else works: a clear time to provide feedback, demonstrate your investment, and help folks advance and stay invested in the company. Make the time to sit down with each employee individually at least once a quarter.

3 The surprising result of a good management practice: more time

Here’s how maintaining a management practice ends up saving you time in the long run according to Brooks:

*I know a lot of these ideas may just seem like, when do I have time for that? I’m trying to build a business! **You have all the time in the world to do this part right because if you can go from 40% productivity to two times that and get 70-80% of their engagement and productivity a day, you’ve won.***

Good management inspires employees to be more productive, and a productive team means less work for you.



PART TWO

HIRING AND CREATING LEADERS

There will come a point when you cannot manage your entire team by yourself. This is true in the office and the field. Another bottleneck can happen when you promote people with no management experience. Just like you need to learn and practice management skills, so do they.

Create an organizational chart ASAP

Start planning out management roles long before you need them and share them with your team. By plotting out future roles that your team can aspire to, you can help them start preparing for those roles before they are promoted. An organizational chart also becomes a part of the larger vision for your company. If one of your goals is to open a second location, for instance, what structure would you need to make this happen?

There will be techs, dispatchers, or office assistants that will dream of running this new location or shoot even higher to be the company's COO. (And if you don't have ambitious team members, this may be a [hiring issue](#).)



INCLUDE A LIST OF RESPONSIBILITIES AND PERFORMANCE STANDARDS

Your organizational chart shouldn't just be a list of job titles. Truly envision (and share) what these roles do. What skill sets would someone need to be promoted to service or office manager? What performance standards will govern the success of these positions?

As you begin to plot out this structure, you'll also start to see how the right set of leaders can do more than just take the responsibility off your hands. There are probably areas where you are weaker than others. How can you find individuals that share your vision for the company who can complement your strengths and weaknesses or who simply enjoys tasks you hate and put off? An office manager with a head for numbers; a service manager with a knack for training.

ORGANIZATIONAL STRUCTURE OVER TIME

In terms of structure, one of the biggest changes as your company grows will be the number of people and specific positions that report directly to you.

On an [episode of the Home Service Expert podcast](#), Terry Nicholson, the Chief Success Officer of Praxis S-10, broke down his thoughts on management structures. According to Terry, a business owner can generally handle about five direct reports which are enough to encompass the main components of your business: operations, administration, sales, marketing, and training.

As your company expands, your number of direct reports should grow smaller so that there are fewer bottlenecks are waiting for multiple levels of approval.

By the time your company reaches maturity, you might end up having a Chief Finance Officer, Chief Operations Officer, and Chief Technology Officer. "The fewer reports you have, the better your company usually will perform if you implement the right principles," Terry explained.



SECTION TWO

When to hire and when to promote internally

As you build out your ideal structure, one of the tough questions becomes knowing when to promote internally and when to hire someone who already has experience in that role.

[Contracting Coach Tony Booth](#) recommends **promoting within whenever possible**. Your team needs goals to strive for, and an important goal for many is climbing the company ladder. “If your culture’s built around supporting your people, then you should be training them to get there.”

When you’re bringing in external talent, your team can easily take offense and it can hurt company morale. But in certain circumstances, external leadership may be necessary. When you’re looking at new opportunities (such as larger commercial contracts or new service lines), most likely these opportunities will be new to your entire team, as well. You’ll want someone with experience in this new field to help ease your company into it.

When considering an internal hire to take on these new opportunities, Tony warns, can you weather the mistakes they’ll potentially make? And can you afford the time it will take for your service or project manager to learn the ins and outs of this new venture?

Unless one of your team members has come to you with previous experience in this area, and they have great people and project management skills, this may be a good opportunity to consider an external hire. When you must hire externally, take extra efforts to maintain your team’s morale and keep them motivated. Offer new growth opportunities. Tony also mentions a third solution: outsourcing. There are times when a consultant can supplement your existing team without the need to hire a full-time employee.



SECTION THREE

Training managers, supervisors, and other leaders

Someone can have terrific technical and people skills and still have no clue how to be a good manager. When you promote internally, most likely you're rewarding technical competence and trustworthiness, not the recognition of leadership skills.

A common mistake for newly promoted managers or supervisors is to do everything themselves instead of helping the team learn how to be more self-sufficient. A tech turned manager will struggle with delegating and will be constantly putting out fires.

Some of this is just a habit. They've spent their career up to this point in positions that required them to focus on their own work, not someone else's. This is a perspective switch you can train. But some of this is also confidence. Their peers are now reporting to them.

BUILD THEIR CONFIDENCE IN LEADING

- Anytime you see your new leader training or delegating in a positive way, reinforce it with good feedback.
- Don't assume they know what their new position calls for. Have casual conversations about what leadership means, how you see it, how they see it, and how you've become a better manager or leader yourself.
- You'll likely experience a downturn in productivity as your team gets used to new management. Tell your new manager you expect this so that it doesn't feel like a failure.

OFFER MANAGEMENT TRAINING EARLY

Trade organizations like [PHCC](#) and [ACCA](#) as well as for-profit organizations like [Praxis S-10](#), offer management training programs and resources. If techs and office staff are interested in moving up the company, get them into these programs before they're up for a new position.

SET PRIORITIES

Back to that organizational chart you created, **what are the performance standards you chose per position?** These are the priorities that a manager or supervisor should strive for. Talk to them about how these performance standards fit into the company's long term plans. Encourage big picture thinking and seeing themselves and each employee that reports to them as a part of this plan.

Absolute Duct and Chimney Cleaning

Since [Absolute Duct and Chimney Cleaning](#) was founded in 2015, the company's annual revenue has **increased by an average of 38% each year** with an increase of 42% in 2019. They've grown to a team of ten, not including owners Joe and Christy Quero, and this year, they are planning on doubling their team.



1 They show their team the possibilities

Joe and Christy keep an organizational chart in place for everyone to see and imagine where they want to be. Included on this chart are the key performance indicators (KPIs) that they will be looking for when they hire for each position:

So during your process, if you can show these KPIs, then we'll consider hiring you for this position," Joe said. "We'd prefer to hire everybody from within so that we don't lose morale. People see these indicators, and it allows people to say, 'Hmm, I think we can do that. I feel like my strength is this. Okay, let me shoot for this position maybe not in a year, but in two years.

For instance, each day dispatch is expected to make 10 outbound calls to property management companies and contractors — people that the company partners with. Out of those calls, the goal is to schedule one luncheon meeting a week.

Meanwhile, techs strive for a certain amount of 5-star reviews a week and a certain amount of dollars sold in upsells. **Promotion doesn't rely solely on meeting production KPIs.** There are also specific characteristics they write into the job descriptions. "Somebody could be a good worker, but a horrible manager because they're not relatable with the team or the clients," Joe explained.

SUCCESS STORY: ABSOLUTE DUCT AND CHIMNEY CLEANING (CONT'D)

2 They personalize their positions based on the talent they have

The organizational chart with its specific metrics offers Joe's team something to aspire to, but it's not a rigid structure that can't be changed based on an individual's specific goals and skill sets.

For instance, one team member worked his way up from a technician helper position to a lead technician in less than a year, and he is now a field manager. "We noticed that he's able to build good relationships with the team in the field and he's able to encourage and give good morale," Joe explained.

But one of the expectations Joe had of field managers was to close new customers which were not this person's strength. "He's not hitting those KPIs, but he's doing much better over here with these KPIs," Joe realized, "so maybe I'm asking too much of him." Joe's solution was to hire a separate salesperson and take those responsibilities off of his field manager's shoulders. "That really helped him be even better at his position because he wasn't pulled from two different directions."

Joe also encourages his team to **envision their own ideal career** and strives to **build a business that can make these career goals happen**. Once a year, they pay their team to come in and make their own dream boards.

"We throw some magazines out and ask, What are your personal dreams?" Joe said. "And then we compare the year over year. What changed? And they have to verbalize it. If you can verbalize the positive affirmation of your visions, then you will start to notice how you could take the first steps to materialize it."

3 Their team has a say in the company's evolving vision

The entire team meets weekly to not only talk about performance and operations but also big picture topics such as the vision of the business. For example, they run new company goals by the entire team. "We leave space if they want to put something new out there, and we say, 'Hey, what do you guys think? How would this positively affect our business? How would this change your life in a positive way?' So we build our team's meetings around character."

To reaffirm this mindset that everyone has a say and a role to play in building the business, Joe never refers to anyone as an employee. **They are always team players.**

MAJOR ACTION ITEMS FROM THIS GUIDE

- ✓ Write or share **company's vision and values**.
- ✓ Create **operations manual** and **share with team**.
- ✓ Set up **one-on-ones** with team members.
- ✓ Create **organizational chart** and **share with team**.
- ✓ Find **leadership/management training programs** for interested employees.



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