
BALANCE TO BASELINE



BLUEPRINT PILLAR WORKBOOK

Plan - Budgeting, Standards, Leadership, Workforce & Benchmarks

Interior Climate Solutions
Meet the baseline. Not more. Not less.
Be In Balance.

The Balance to Baseline™ Framework - © 2026 Kirk E. Barrett / Cimbrian, Inc.

The Balance to Baseline Approach

Balance to Baseline is an operating philosophy that assigns a measurable standard (a baseline) to every activity in the company and holds the entire organization accountable to meeting that standard. Not exceeding it recklessly. Not falling short of it quietly. Meeting it. Consistently. Predictably. In balance.

The Employee-Up Principle: This workbook is built on a fundamental belief: the people who do the work are the best people to document the work. Management does not write your SOPs. YOU do. You are the expert in your process. You know the steps, the shortcuts, the pitfalls, and the nuances that no manager sitting in an office could capture. When you document your process, you own it. When you own it, you take pride in it. When you take pride in it, you improve it. That is Balance to Baseline.

How This Workbook Works

This workbook contains task worksheets for every baseline that must be established within the BLUEPRINT Pillar. For each task:

1. **A Process Owner is assigned.** This is the employee who currently performs or is closest to this work. They own the documentation.
2. **Items to Define are listed.** These are the specific decisions, metrics, values, or standards that must be established. Fill in the “Baseline Value / Decision” column.
3. **An SOP Framework is provided.** For every process, the owner documents the step-by-step procedure using the standard template. This becomes the official SOP.
4. **Management reviews and approves.** The owner presents their completed worksheet to peers and leadership. Feedback is incorporated. The SOP is published to the central repository.
5. **The owner maintains it forever.** When the process changes, the owner updates the SOP. Ownership can be transferred, but the principle remains: the person who does the work owns the documentation.

Completing a Task Worksheet

Step 1 - Read the task description. Understand what baseline needs to be established and why it matters to the business.

Step 2 - Fill in ownership. Management assigns the Process Owner (employee) and the Reviewer (manager). Set a target completion date.

Step 3 - Answer every question in the Items to Define table. Be specific. Write numbers, not feelings. “48 hours” not “quickly.” “85%” not “high.” If you don’t know the answer, write your best estimate and flag it for discussion.

Step 4 - Document the SOP. Using the framework provided, write the step-by-step process as if you were teaching a brand-new hire who has never done this before. If they can follow your steps and produce the right result, your SOP is good.

Step 5 - Present and get approved. Share your completed worksheet with your team and your manager. Accept feedback. Revise. Get the final sign-off. Your SOP is now official.

The BLUEPRINT Pillar: Plan - Budgeting, Standards, Leadership, Workforce & Benchmarks

The Blueprint Pillar is the foundation of Balance to Baseline. Without accurate planning, every downstream activity is compromised. Inaccurate budgets produce inaccurate quotes, which produce unmet expectations, which produce unpaid invoices.

Blueprint ensures that before any work is sold, scheduled, or executed, the plan is solid. This pillar establishes the flat-rate pricing architecture, the SOP library, the leadership cadence, the staffing plan, and the performance benchmarks that every other pillar depends on.

B-to-Baseline areas in this pillar:

- **Budget to Baseline:** Company-wide budgeting, flat-rate books, revenue targets, and financial planning.
- **Baseline to Baseline:** SOPs for every process - the anchor of the entire system.
- **Board to Baseline:** Leadership alignment, meeting cadence, and decision-making discipline.
- **Bring to Baseline:** HR, hiring, onboarding, payroll, and benefits administration.
- **Benchmarks to Baseline:** Performance standards and KPIs for every role.

Task Index

#	Task	B-to-Baseline Area	Owner	Status
1	Build Flat-Rate Tasks Book (PM Services)	Budget to Baseline		
2	Build Flat-Rate Tasks Book (Break/Fix Services)	Budget to Baseline		
3	Build Flat-Rate Jobs Book & Parts Kits	Budget to Baseline		
4	Set Annual Revenue Targets by Service Line & Zone	Budget to Baseline		
5	Define Technician Utilization Targets	Budget to Baseline		
6	Document All SOPs - Master Process Inventory	Baseline to Baseline		
7	Create Customer-Specific Portal SOPs	Baseline to Baseline		
8	Establish Leadership Meeting Cadence & Dashboard	Board to Baseline		
9	Build Staffing Plan (135 to 200 Technicians)	Bring to Baseline		
10	Design Onboarding Checklist by Role	Bring to Baseline		
11	Establish Payroll & Benefits Baselines	Bring to Baseline		
12	Define KPIs by Role	Benchmarks to Baseline		

TASK 1: Build Flat-Rate Tasks Book (PM Services)

Define standard time budgets for every Preventative Maintenance task type. This is the foundation of accurate quoting and scheduling. The employee who estimates or dispatches PM work should own this.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What are all PM task types? (Major PM, Minor PM, Spring PM, Fall PM, Filter-Only, Belt Inspection, etc.)	
2	What is the standard hour budget for each PM type by equipment category (RTU, split, package unit, VRF)?	
3	Does hour budget vary by tonnage? If so, what are the tiers (under 5 ton, 5-10 ton, 10-25 ton, 25+ ton)?	
4	What is the standard hour budget for multi-unit sites (e.g., 10 RTUs - is it 10x single unit or is there an efficiency factor)?	
5	What travel time assumptions are built into the budget vs. billed separately?	
6	What is the standard filter change time per unit type?	
7	What seasonal adjustments exist (Spring vs. Fall PM scope differences)?	
8	What documentation/checklist is required for each PM type?	
9	What is the baseline quote turnaround for PM work (hours from request to quote submitted)?	
10	Who approves deviations from the flat-rate Tasks Book?	

SOP Documentation Framework:

The employee who owns this process documents it below. This becomes the official SOP. You do the work - you write the steps. Management supports, but YOU own it.

Process Name	
Purpose (Why does this process exist?)	
Trigger (What starts this process?)	
Inputs (What do you need before starting?)	
Step-by-Step Procedure	1. 2. 3. 4. 5. 6. 7. 8.
Tools / Systems Used	
Output (What is produced?)	
Handoff (Who gets it next?)	
Baseline Standard (How do we know it was done right?)	
Common Mistakes to Avoid	
Time Budget (How long should this take?)	

Notes / Additional Context:

TASK 2: Build Flat-Rate Tasks Book (Break/Fix Services)

Define standard time budgets for diagnostic and break/fix service calls. These are the reactive calls where a tech must diagnose, potentially quote parts, and either fix on-site or schedule a return.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What are the standard Service Request Codes (SRCs) for break/fix work?	
2	What is the standard diagnostic time budget by equipment type?	
3	What is the standard time budget for common repairs (contactor replacement, fan motor, capacitor, refrigerant charge, etc.)?	
4	What is the baseline for same-day diagnostic submission to the quoting team?	
5	What is the hour budget for emergency vs. standard break/fix calls?	
6	What is the minimum billable time for a service call (e.g., 1-hour minimum)?	
7	How is travel time budgeted for break/fix vs. built into the rate?	
8	What documentation must the tech submit after a diagnostic-only visit?	
9	What are the SLA response time baselines by priority level (emergency, urgent, standard)?	
10	How do we handle break/fix on equipment not under our maintenance contract?	

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Notes / Additional Context:

TASK 3: Build Flat-Rate Jobs Book & Parts Kits

Define complete job packages (labor + Parts Kits) for the top 30 most common repairs and installations. Cross-reference parts to preferred distributors with negotiated pricing.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What are the top 30 repair/install jobs by frequency?	
2	For each job: what is the labor hour budget?	
3	For each job: what parts are in the Kit (part numbers, quantities)?	
4	For each Kit: who is the preferred distributor by zone (SW, N&E, SE)?	
5	For each Kit: what is the negotiated parts cost?	
6	For each Kit: what is the total quoted price (labor + parts + margin)?	
7	What is the process when a job doesn't have an existing Kit (custom quote procedure)?	
8	How often are Kits reviewed and updated (quarterly, semi-annually)?	
9	Who owns Kit maintenance and accuracy?	
10	What is the target percentage of quotes that use Kits vs. custom (e.g., 70% Kit-based)?	

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Time Budget (How long should this take?)	

Notes / Additional Context:

TASK 4: Set Annual Revenue Targets by Service Line & Zone

Establish revenue targets broken down by service line (PM, Break/Fix, Install/Project) and by zone (Southwest, North & East, Southeast, Subcontracting).

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What is the total company revenue target for the fiscal year?	
2	How does revenue break down by service line (PM %, Break/Fix %, Install/Project %)?	
3	What is the revenue target for each zone?	
4	What are monthly milestones by zone and service line?	
5	What is the revenue-per-technician target?	
6	What is the target number of jobs per tech per day by service type?	
7	How is subcontracting revenue tracked vs. direct service revenue?	
8	What capital expenditures are budgeted to support revenue targets?	
9	What is the hiring ramp needed to achieve targets (current 135 to target 200 techs)?	
10	What quarterly review cadence and variance threshold triggers corrective action?	

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Common Mistakes to Avoid	
Time Budget (How long should this take?)	

Notes / Additional Context:

TASK 5: Define Technician Utilization Targets

Set the billable utilization rate target for technicians and the supporting ratios for administrative staff.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What is the target billable utilization rate for technicians (e.g., 85%)?	
2	How is billable time defined (on-site + travel, or on-site only)?	
3	How many available hours per tech per week (40? 45?)?	
4	What non-billable time is budgeted (training, truck stock, meetings, admin)?	
5	What is the target dispatcher-to-technician ratio (e.g., 1:15)?	
6	What is the target Service Manager-to-technician ratio (e.g., 1:10)?	
7	What is the target CSR-to-portal workload ratio?	
8	How is utilization tracked (daily, weekly)?	
9	What is the minimum acceptable utilization before triggering a corrective conversation?	
10	What seasonal utilization adjustments are expected (summer peak vs. winter)?	

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Common Mistakes to Avoid	
Time Budget (How long should this take?)	

Notes / Additional Context:

TASK 6: Document All SOPs - Master Process Inventory

Create a master inventory of every repeatable process in the company. Identify which have documented SOPs and which do not. Assign owners. This is the master task that drives all other SOP documentation across every pillar.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	List every repeatable process across all departments (use categories: Sales, Dispatch, Field Operations, Quoting, Purchasing, Invoicing, Collections, HR, Training, IT).	
2	For each process: does a documented SOP currently exist? (Yes/No)	
3	For each process without an SOP: who is the employee best positioned to document it?	
4	What is the priority order for SOP creation (revenue-critical first)?	
5	Where will SOPs be stored (central repository - SharePoint, Google Drive, internal wiki)?	
6	What is the SOP template format (use the framework in each task worksheet)?	
7	What is the review cycle for SOPs (semi-annual)?	
8	How are SOPs version-controlled?	
9	How are new hires trained on applicable SOPs?	
10	What is the target date to have all critical SOPs documented?	

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Baseline Standard (How do we know it was done right?)	
Common Mistakes to Avoid	
Time Budget (How long should this take?)	

Notes / Additional Context:

TASK 7: Create Customer-Specific Portal SOPs

Document portal procedures for each major property management customer. Every CSR and Dispatcher must know the specific login, SLA, status update, NTE, and invoicing requirements for each portal.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	List every customer portal we use (CBRE, Vixxo, Cushman & Wakefield, Public Storage, Fexa/Dollar General, others).	
2	For each portal: what is the job acceptance SLA?	
3	For each portal: what status updates are required and at what frequency?	
4	For each portal: what is the NTE threshold before requiring increase approval?	
5	For each portal: what is the NTE increase request procedure?	
6	For each portal: what invoice format and documentation is required?	
7	For each portal: what are the penalty clauses for SLA violations?	
8	For each portal: who has login credentials and how are they managed?	
9	For each portal: what is the work order close-out procedure and documentation?	
10	Who is the backup if the primary portal operator is unavailable?	

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Tools / Systems Used	
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Baseline Standard (How do we know it was done right?)	
Common Mistakes to Avoid	
Time Budget (How long should this take?)	

Notes / Additional Context:

TASK 8: Establish Leadership Meeting Cadence & Dashboard

Define the weekly leadership meeting structure, agenda, and dashboard metrics that ensure the five-pillar framework is reviewed consistently.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What day/time is the weekly leadership meeting?	
2	Who is required to attend (GM, Zone Managers, Controller, Service Managers, HR)?	
3	What is the standard agenda structure (review each pillar with metrics)?	
4	What dashboard tool will be used (GoogleSheets, Power BI, Excel, ICSNext (recommended))?	
5	What are the top 3 metrics reviewed for each pillar weekly?	
6	What is the escalation protocol when a metric is below baseline?	
7	How are action items tracked and followed up?	
8	What is the quarterly review format (deeper dive vs. weekly cadence)?	
9	How are baseline metrics communicated to all employees monthly?	
10	Who owns dashboard maintenance and data accuracy?	

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Common Mistakes to Avoid	
Time Budget (How long should this take?)	

Notes / Additional Context:

TASK 9: Build Staffing Plan (135 to 200 Technicians)

Create the 12-month rolling staffing plan aligned to revenue targets and zone expansion. Include technicians, dispatchers, CSRs, SMs, and administrative support.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What is the target headcount by role by zone by quarter?	
2	What is the current headcount vs. target by zone?	
3	What is the average time-to-fill for a technician position?	
4	What are the primary recruiting channels by zone (trade schools, referrals, job boards)?	
5	What is the referral bonus structure?	
6	What is the annual turnover rate by zone and by role?	
7	What is the cost-per-hire by role?	
8	What is the truck stock and equipment cost per new technician (\$90K+)?	
9	What training capacity exists per zone per quarter (how many new hires can we absorb)?	
10	What is the trigger to begin recruiting (e.g., when utilization exceeds 90% for 4 consecutive weeks)?	

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Trigger (What starts this process?)	
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Tools / Systems Used	
Output (What is produced?)	
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Baseline Standard (How do we know it was done right?)	
Common Mistakes to Avoid	
Time Budget (How long should this take?)	

Notes / Additional Context:

TASK 10: Design Onboarding Checklist by Role

Create a comprehensive onboarding checklist for each role type. No employee is dispatched solo or given live responsibilities until every item is checked off.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What items must be completed before a tech's first solo dispatch? (List all: truck stock loaded, tools issued, uniform fitted, portal credentials, SOP training, Balance to Baseline training, ride-along days, safety certifications)	
2	What items must be completed before a dispatcher goes live?	
3	What items must be completed before a CSR handles portal calls?	
4	What is the truck stock loading procedure and verification process?	
5	How many ride-along days are required for new techs (with SM)?	
6	What Balance to Baseline philosophy training is required in week 1?	
7	What are the 30/60/90-day milestone checkpoints for each role?	
8	Who signs off on onboarding completion?	
9	What is the process if onboarding items are incomplete at the milestone date?	
10	How is onboarding completion tracked as an HR baseline metric?	

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Output (What is produced?)	
Handoff (Who gets it next?)	
Baseline Standard (How do we know it was done right?)	
Common Mistakes to Avoid	
Time Budget (How long should this take?)	

Notes / Additional Context:

TASK 11: Establish Payroll & Benefits Baselines

Define the standards for payroll accuracy, processing timeliness, and benefits administration.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What is the acceptable payroll error rate (target: <0.5%)?	
2	What is the payroll processing and verification procedure before release?	
3	What is the deadline for timecard submission by technicians?	
4	What is the deadline for manager timecard approval?	
5	What is the payroll dispute resolution procedure and timeline?	
6	When must benefits changes be processed relative to effective date (target: 30 days ahead)?	
7	What is the open enrollment timeline and communication plan?	
8	What is the process for life event benefits changes?	
9	How are payroll and benefits errors tracked and reported?	
10	Who audits payroll accuracy monthly?	

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Baseline Standard (How do we know it was done right?)	
Common Mistakes to Avoid	
Time Budget (How long should this take?)	

Notes / Additional Context:

TASK 12: Define KPIs by Role

Establish the specific key performance indicators for every role in the company. These become the foundation for the bonus structure and performance reviews.

Process Owner (Employee)	Name: _____ Role: _____
Reviewer / Manager	Name: _____ Role: _____
Date Assigned	____/____/____
Target Completion	____/____/____
Status	☐ Not Started ☐ In Progress ☐ Draft Complete ☐ Reviewed ☐ Approved

Items to Define, Decide, or Document:

#	Question / Item to Define	Baseline Value / Decision
1	What are the top 5-8 KPIs for technicians? (See Bonus to Baseline tables for reference)	
2	What are the top 5-6 KPIs for dispatchers/CSRs?	
3	What are the top 5-7 KPIs for Service Managers?	
4	What are the top 6-8 KPIs for Zone Managers?	
5	What are the top 4-5 KPIs for the Quoting/Estimating team?	
6	What are the top 4-5 KPIs for the Purchasing team?	
7	What are the top 4-5 KPIs for Billing/Collections?	
8	What are the top 4-6 KPIs for HR?	
9	What is the reporting cadence for each KPI (daily, weekly, monthly)?	
10	What tool or system will track and display KPI performance?	
11	What is the threshold for "at baseline" vs. "below baseline" for each KPI?	

12	How are individual KPIs communicated to each employee?	
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