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Client Management SOPs

SOPs 001 through 007 cover the client-facing decisions that generate the highest volume of owner interruptions in landscape companies. From onboarding a new client to managing a cancellation threat, each procedure embeds Decision Rights, escalation criteria, and cadence connections so your Account Manager can operate with confidence and your owner can stay out of the weeds.

SOP #	Title	Primary Template
SOP-001	New Client Onboarding	Template 2 (Client Tiering)
SOP-002	Property Walkthrough	Template 2, Template 11 (Quality)
SOP-003	Service Scope Changes	Template 4 (Change Orders)
SOP-004	Pricing Deviations	Template 3 (Pricing)
SOP-005	Contract Renewal	Template 3 (Pricing)
SOP-006	Client Complaint Resolution	Template 9 (Complaints & Credits)
SOP-007	At-Risk Client Protocol	Template 9 (Complaints & Credits)

Calibrated for \$6M-\$10M landscape operations. Adjust thresholds up or down for your revenue stage.

SOP-001 | New Client Onboarding

Purpose

Every new client sets the tone for the entire relationship. Without a structured onboarding process, Account Managers improvise, details get missed, and the owner gets pulled in to fix first impressions. This SOP ensures every new client receives a consistent, professional onboarding experience with clear ownership at every step.

Primary Roles: Account Manager, Ops Manager

Related Templates: Template 2 (Client Tiering), Template 4 (Change Orders)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Client tier assignment	Account Manager	Revenue threshold, contract type, referral source, and strategic value.	Client requests Tier 1 service level but revenue does not qualify.	Owner: weekly new client summary.
Service scope and pricing	Account Manager	Approved rate card. 45% gross margin minimum. Standard contract terms.	Client requests custom pricing, scope outside rate card, or discount.	Owner: weekly sales report.
Contract terms beyond standard	Owner	Non-standard liability, payment terms, or scope commitments.	N/A - Owner-level.	A/M coordinates all client communication.

Step-by-Step Procedure

PHASE 1: PRE-START (WITHIN 48 HOURS OF SIGNED CONTRACT)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Account Manager	Assign client tier based on criteria: Tier 1: Top 20% revenue or strategic Tier 2: Standard maintenance clients Tier 3: Seasonal or one-time Document in CRM with tier justification.	Client expects Tier 1 treatment but qualifies as Tier 2. Owner decides tier override.	New clients reported at Monday Standup.
2	Account Manager	Build client profile in CRM: contact info, property address, gate codes, irrigation details, HOA requirements, special instructions, photos of property. Attach signed contract and scope document.	Client has non-standard requirements not in contract. Flag before first service.	CRM completeness checked at Monthly Decision Review.
3	Account Manager	Send welcome communication to client: confirm service start date, crew day, A/M contact information, and what to expect on first visit. Phone call for Tier 1; email for Tier 2/3.	Client raises concerns or requests changes before first service.	Client communication logged in CRM.

PHASE 2: INTERNAL HANDOFF (BEFORE FIRST SERVICE)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
4	Account Manager	Brief Ops Manager on new client: tier, property specifics, special instructions, and any client sensitivities. O/M assigns crew and route placement.	Route capacity issue. New client requires specific crew skill set not available.	Wednesday Ops Review: new client integration.
5	Ops Manager	Brief assigned Crew Leader: property access, tier expectations, quality standard (9/10 for Tier 1, 8/10 for Tier 2), photo requirements. Provide property map if complex.	Crew Leader identifies scope concern after reviewing property details.	Crew Leader briefing part of daily dispatch.

PHASE 3: FIRST SERVICE AND FOLLOW-UP

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
6	Crew Leader	Complete first service to full quality standard. Walk property before and after. Document with photos (required for all tiers on first visit). Complete Property Service Form. Note any scope concerns.	Property conditions do not match contract scope. Access issues. Safety concerns.	End-of-day report to Ops Manager.
7	Account Manager	Follow up with client within 24 hours of first service. Phone call for Tier 1. "How did everything look? Anything we should adjust?" Document feedback in CRM.	Client dissatisfied with first service. Redo authority applies per SOP-006.	Friday Close-Out: new client feedback. Monday: adjustments.
8	Account Manager	Schedule 30-day check-in on calendar. Review: quality scores, crew feedback, client satisfaction. Confirm tier assignment is appropriate. Close onboarding in CRM.	Client has complained within first 30 days. Escalate per SOP-006 criteria.	30-day review at Monthly Decision Review agenda.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Onboarding completion (all 8 steps)	----- %	100%	CRM checklist	Monday
First-service follow-up within 24 hours	----- %	100% Tier 1 90% Tier 2/3	CRM activity log	Friday
30-day client satisfaction	----- %	> 90% satisfied	A/M check-in log	Monthly
New client complaints (first 60 days)	----- /mo	< 2 per month	KPI Dashboard	Wednesday

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By



SOP-002 | Property Walkthrough

Purpose

Property walkthroughs are where promises meet reality. Without a structured approach, the Account Manager walks a property, makes mental notes, and hopes the crew interprets them correctly. This SOP creates a documented, repeatable walkthrough process that connects directly to the Property Service Form and quality standards.

Primary Roles: Account Manager, Crew Leader

Related Templates: Template 2 (Client Tiering), Template 11 (Quality Issues)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Walkthrough schedule	Account Manager	Tier 1: monthly. Tier 2: quarterly. Tier 3: as needed or upon complaint.	Tier 1 walkthrough missed for 2 consecutive months.	Owner: monthly visit compliance report.
Quality standard adjustment	Account Manager + Ops Mgr	Based on walkthrough findings. Adjust crew instructions, time allocation, or scope.	Quality score below tier standard for 2 consecutive visits.	Owner: informed via Wednesday Ops Review.
Scope change from walkthrough	Account Manager	Within rate card. Documented and signed by client. No contract modification.	Change exceeds \$500 or modifies base contract terms.	O/M informed of scheduling impact.

Step-by-Step Procedure

PHASE 1: WALKTHROUGH PREPARATION

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Account Manager	Pull property history before walkthrough: last 3 quality scores, any complaints, crew notes, previous walkthrough findings. Print or pull up Property Service Forms.	No quality scores on file. Crew has not been completing forms.	Walkthrough schedule reviewed at Monthly Decision Review.
2	Account Manager	Walk property systematically using the 10-point Quality Checklist as your guide. Photograph: problem areas, improvement opportunities, and things done well. Note irrigation, drainage, turf health.	Safety hazard discovered (trip hazard, dead tree, standing water). Flag immediately to O/M.	Photos stored in CRM property file.

PHASE 2: DOCUMENTATION AND ACTION

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Account Manager	Score property against tier standard: Tier 1: 9/10 minimum. Tier 2: 8/10. Document findings and action items. Categorize: crew action, scope change, or client conversation needed.	Score 2+ points below tier standard. Systemic issue requiring O/M root cause analysis.	Wednesday Ops Review: properties below standard.
4	Account Manager	Brief Ops Manager on findings requiring crew action. O/M communicates to Crew Leader with specific instructions. If enhancement opportunity identified, present proposal to client within 7 days.	Enhancement proposal exceeds rate card or requires custom pricing.	Enhancement revenue tracked on A/M Role Card metrics.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Tier 1 monthly visit compliance	----- %	100%	CRM visit log	Monthly
Tier 2 quarterly visit compliance	----- %	> 90%	CRM visit log	Monthly
Enhancement proposals from walkthroughs	----- /mo	Trending up	Sales pipeline	Monthly
Average quality score (walkthrough)	----- /10	> 8.5 average	Property Service Forms	Wednesdays

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

SOP-003 | Service Scope Changes

Purpose

Scope changes are one of the most common sources of owner interruptions. A client asks for something extra, the crew is not sure if they should do it, and the question travels up the chain. This SOP gives your people clear criteria for what they can approve on the spot, what needs documentation, and what requires owner involvement.

Primary Roles: Account Manager, Crew Leader

Related Templates: Template 4 (Change Orders)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Minor on-site adjustment (<15 min)	Crew Leader	Does not change service time by more than 15 min. No contract impact.	Client requests contract scope changes.	A/M informed of any client-facing change.
Standard enhancement change order	Account Manager	Approved rate card. Documented and signed by client.	Change order exceeds \$500 or modifies base contract terms.	O/M informed of scheduling impact.
Contract-altering change order	Owner	Material change to scope, pricing, or service agreement.	N/A - Owner-level.	All parties informed in writing.

Step-by-Step Procedure

PHASE 1: REQUEST INTAKE

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Crew Leader or A/M	Receive scope change request from client. Determine request type: A) Minor on-site adjustment (<15 min) B) Enhancement within rate card C) Contract-altering modification Type determines authority and next step.	Client is insistent that crew perform work beyond their authority. Crew Leader calls A/M.	Scope requests logged in CRM for pattern analysis.
2	Crew Leader	FOR TYPE A ONLY: Make the adjustment if it meets all criteria. Does not exceed 15 min. No contract impact. Document on Property Service Form. Inform A/M of any client-facing change.	Adjustment would take more than 15 min or creates scheduling impact for next property.	Monday Standup: flag recurring minor requests by client.

PHASE 2: PROPOSAL AND APPROVAL

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Account Manager	FOR TYPE B: Price using approved rate card. Confirm 45% gross margin minimum. Prepare change order document. Present to client for signature. Document signed change order in CRM.	Client requests pricing below rate card. Total change order exceeds \$500.	Enhancement revenue on weekly sales report.
4	Account Manager	FOR TYPE C: Document the request fully. Brief Owner with: current contract terms, requested change, revenue impact, and recommendation. Owner decides. A/M communicates outcome to client.	N/A - Owner-level. Legal review needed if liability or payment terms affected.	Owner: weekly sales report and contract tracker.

PHASE 3: IMPLEMENTATION

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
5	Account Manager	Brief Ops Manager on approved scope change. O/M adjusts crew assignment, route time, and materials if needed. Confirm implementation date with client.	Scope change requires resources beyond current crew capacity or subcontractor.	Wednesday Ops Review: scope changes and scheduling impact.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Change orders processed within 48 hours	_____ %	> 90%	CRM pipeline	Wednesday
Enhancement revenue from scope changes	\$_____ /mo	Trending up	Sales report	Monthly
Scope changes escalated to owner	_____ /mo	< 3 per month	KPI Dashboard	Wednesday
Change order margin	_____ %	> 45% gross	Job costing	Monthly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By



SOP-004 | Pricing Deviations

Purpose

Pricing decisions are where owner dependency is most visible. Every discount request, every competitive bid response, every margin exception routes to the owner because nobody else has the authority or criteria to make the call. This SOP gives your Account Manager clear pricing authority with guardrails that protect your margins.

Primary Roles: Account Manager, Owner

Related Templates: Template 3 (Client Pricing)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Enhancement pricing (standard)	Account Manager	Approved rate card only. 45% gross margin minimum.	Client requests discount below rate card.	Owner: weekly sales report.
Contract renewal - no price change	Account Manager	Client in good standing. No cost increase required.	Client disputes pricing or competitor is actively bidding.	Owner: renewal tracker.
Competitive bid / discount approval	Owner	Review margin impact and strategic account value.	N/A - Owner-level.	A/M informed of outcome and reasoning.

Step-by-Step Procedure

PHASE 1: PRICING REQUEST ASSESSMENT

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Account Manager	Identify pricing situation type: A) Standard enhancement - use rate card B) Renewal with no price change C) Client requesting discount D) Competitor actively bidding Type determines authority level.	Type C or D: Owner involvement required. Do not commit to pricing before approval.	Pricing requests logged for weekly sales report.
2	Account Manager	FOR TYPE A/B: Verify criteria are met. Rate card pricing with 45% margin minimum. Client in good standing (current on payments, no open disputes). Process normally.	Margin calculation falls below 45%. Client has outstanding balance > 60 days.	Renewal tracker updated weekly.

PHASE 2: OWNER-LEVEL PRICING DECISIONS

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Account Manager	FOR TYPE C/D: Prepare pricing brief: current contract value, requested discount, margin impact at requested price, client history, competitive intelligence, and A/M recommendation. Present to Owner.	N/A - Owner is the decision maker here. A/M provides data and recommendation.	Wednesday Ops Review or same-day if urgent competitive situation.
4	Owner	Review margin impact and strategic value. Decide: approve discount, counter-offer, hold pricing, or let client leave. Document reasoning for future reference. A/M communicates decision to client.	N/A - Owner-level.	Decision documented in CRM. Pricing patterns at Monthly Decision Review.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Average gross margin on enhancements	----- %	> 45%	Job costing report	Monthly
Renewal rate (no price change)	----- %	> 85%	Renewal tracker	Monthly
Discount requests escalated to owner	----- /mo	Track only	CRM log	Wednesday
Revenue lost to competitor pricing	\$----- /mo	Trending down	Lost client log	Monthly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

SOP-005 | Contract Renewal

Purpose

Contract renewals should be a system, not a scramble. Most landscape companies start thinking about renewals 30 days before expiration and then wonder why clients leave. This SOP starts the renewal process 90 days out and gives your Account Manager clear authority for standard renewals while escalating competitive or at-risk situations early enough to act.

Primary Roles: Account Manager, Owner

Related Templates: Template 3 (Client Pricing)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Standard renewal - no price change	Account Manager	Client in good standing. No cost increase required. No open complaints.	Client disputes pricing or mentions competitor.	Owner: renewal tracker weekly.
Renewal with price increase	Account Manager	Increase within approved range (cost-of-living or material cost pass-through).	Client pushes back on increase or requests negotiation.	Owner: informed before client communication.
At-risk renewal / competitive situation	Owner	Tier 1 account. Competitor actively bidding. Client expressing dissatisfaction.	N/A - Owner-level.	A/M provides complete client file and history.

Step-by-Step Procedure

PHASE 1: 90-DAY PRE-RENEWAL

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Account Manager	Pull renewal list 90 days before expiration. Review each account: complaint history, quality scores, payment status, tier, and competitive intelligence. Categorize: Green (auto), Yellow (attention), Red (at-risk).	Red accounts: brief Owner immediately. Do not wait for the 60-day mark.	Renewal pipeline reviewed at Monthly Decision Review.
2	Account Manager	FOR GREEN ACCOUNTS: Prepare renewal document with current or adjusted pricing. Send to client with cover letter. Phone call for Tier 1; email for Tier 2/3. Follow up within 14 days if unsigned.	Green account signals dissatisfaction during renewal outreach. Reclassify to Yellow.	Renewal status on weekly report.

PHASE 2: 60-DAY ACTIVE MANAGEMENT

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Account Manager	FOR YELLOW ACCOUNTS: Schedule meeting. Address concerns. Present value: quality scores, response times, reliability data. Propose solutions for any open issues before renewal.	Yellow account requests discount or mentions competitor. Escalate per SOP-004 criteria.	Wednesday Ops Review: yellow account status.
4	Owner	FOR RED ACCOUNTS: Owner reviews full client file. Makes direct contact. Determines strategy: enhanced service, price adjustment, or managed exit. A/M executes the agreed strategy.	N/A - Owner-level.	At-risk accounts briefed to Owner weekly per A/M Role Card.

PHASE 3: 30-DAY CLOSE

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
5	Account Manager	Final follow-up on all unsigned renewals. For non-renewals: conduct exit conversation. Document reason for loss in CRM. Notify O/M to remove from schedule. Update revenue forecast.	Large account (> 5% of revenue) not renewing. Owner informed immediately.	Friday Close-Out: renewal wins and losses. Monthly: retention rate.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Client retention rate (rolling 12-month)	----- %	> 85%	KPI Dashboard	Monthly
Renewal process started 90 days out	----- %	100%	Renewal tracker	Monthly
Average days to signed renewal	----- days	< 45 days	CRM pipeline	Monthly
Non-renewal exit interviews completed	----- %	100%	CRM log	Monthly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By



SOP-006 | Client Complaint Resolution

Purpose

Eliminate the 27-Minute Problem from your complaint resolution process. Every client complaint that lands on the owner's desk when it did not need to costs your company time, money, and credibility. When your Account Manager knows exactly what they own, what criteria to apply, and when to escalate, complaints get resolved faster, clients feel heard sooner, and you stop being the bottleneck.

Primary Roles: Account Manager, Ops Manager

Related Templates: Template 9 (Complaints & Credits), Template 11 (Quality Issues)

THE RULE:

If a complaint can be resolved within the criteria below, it gets resolved today. Not tomorrow. Not after the owner weighs in. Today. The criteria exist so your people do not need permission. They need clarity.

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
First complaint - credit up to \$200	Account Manager	Valid complaint. Documented. Recent visit within 7 days, photo evidence.	Credit > \$200 or 2nd credit to same client < 60 days.	Owner: weekly client report.
Recurring complaint (3+ in 90 days)	Acct Mgr + Ops Mgr	Root cause analysis. Review crew, quality history, service frequency.	Pattern does not resolve after two corrective actions.	Owner informed of findings and proposed plan.
At-risk account / cancellation threat	Owner	Tier 1 or strategic account. Revenue or relationship at risk.	N/A - Owner-level.	A/M coordinates all follow-up communication.

Step-by-Step Procedure

PHASE 1: INTAKE (WITHIN 60 MINUTES)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Account Manager	Acknowledge complaint within 60 min. Phone preferred; email if unreachable. "I hear you. Let me look into this and get back to you by [specific time today]." Do not promise a specific outcome.	Client threatening cancellation or using words like "done," "leaving," or "lawyer." Go to Step 7.	Monday Standup if weekend complaint. Log in CRM.
2	Account Manager	Determine complaint type: A) Quality (missed area, poor cut, debris) B) Service (skipped visit, late, wrong day) C) Communication (not notified of change) D) Damage (property, irrigation, landscape)	Type D with potential liability: inform O/M and Owner immediately.	Track type for pattern analysis at Wednesday Ops Review.

PHASE 2: INVESTIGATION (WITHIN 4 HOURS)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	A/M + Ops Mgr	Verify complaint. Pull Property Service Form. Contact Crew Leader for their account. If quality-related, O/M visits within 24 hrs. Document with photos and service history.	Crew confirms issue known and not reported: now a performance issue. 2nd complaint same crew in 30 days.	O/M brings crew patterns to Wednesday review.
4	Account Manager	Check CRM complaint history: Complaints in last 90 days? Credits issued? When? How much? This determines your authority level.	3+ complaints in 90 days: Recurring. Authority shifts to A/M + O/M jointly. Previous credit <60 days.	90-day trend feeds Monthly Decision Review data.

PHASE 3: RESOLUTION (SAME BUSINESS DAY)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
5	Account Manager	FIRST COMPLAINT (A/M authority): Apply criteria: Valid + documented + visit within 7 days + photo evidence. Options: a) Redo within 48 hrs b) Credit up to \$200 c) Redo + partial credit. Call client. Document in CRM.	Credit > \$200. Client rejects resolution. Client requests contract change. Elevate to Owner.	Credit total on weekly report. Friday Close-Out: win or miss.
6	A/M + Ops Mgr	RECURRING (joint authority): Root cause: crew issue, routing issue, or expectation mismatch? Build corrective plan with 30-day review. A/M presents to client. O/M implements.	Systemic root cause. Corrective action needs budget. Pattern persists after two actions.	30-day review at Monthly Decision Review.

PHASE 4: AT-RISK / CANCELLATION (OWNER-LEVEL)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
7	Owner	A/M briefs Owner with complete file. Owner contacts client within 24 hours. Determines retention strategy. A/M coordinates all follow-up.	N/A - Owner-level. Legal language: involve counsel first.	A/M briefs Owner on at-risk weekly. Quarterly Assessment.

PHASE 5: CLOSING THE LOOP

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
8	Account Manager	Follow up within 7 days of resolution. If satisfied: close in CRM. If not: return to Step 4, reassess.	New complaint within 14 days on same property: treat as recurring.	Friday Close-Out: Client Pulse. Track satisfaction.
9	Ops Manager	Update KPI Dashboard: resolution time, complaints/week, monthly credit total. If crew issue: coaching within 5 days.	Resolution time > 8 hrs. Flag at Wednesday Ops Review.	Dashboard before Wednesday review. Crew coaching weekly.

Decision Authority Quick Reference

ACCOUNT MANAGER I OWN	A/M + OPS MANAGER WE OWN TOGETHER	OWNER I ELEVATE
<ul style="list-style-type: none"> • First complaint resolution • Service credit up to \$200 • Redo scheduling (within 48 hrs) • Client follow-up within 7 days • CRM documentation 	<ul style="list-style-type: none"> • 3+ complaints in 90 days • Root cause analysis • Corrective action plan • Crew reassignment • 30-day pattern review 	<ul style="list-style-type: none"> • Credit exceeding \$200 • 2nd credit same client <60 days • Cancellation threat • Tier 1 at-risk account • Legal or contract risk

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Complaint resolution time	_____ hrs	< 8 hours	KPI Dashboard (#5)	Wednesday
Complaints per week	_____ /wk	Trending down	KPI Dashboard (#2)	Wednesday
Monthly credit total	\$_____	Trending down	A/M Role Card	Monthly
Escalations to owner (complaint-related)	_____ /wk	< 2 per week	KPI Dashboard (#1)	Wednesday
Client retention (rolling 12-month)	_____ %	> 85%	KPI Dashboard	Monthly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

SOP-007 | At-Risk Client Protocol

Purpose

By the time a client says "I am thinking about leaving," you have already lost weeks of opportunity to save the relationship. This SOP creates an early warning system that identifies at-risk clients before they reach the cancellation conversation and gives the owner a structured playbook for retention or managed exit.

Primary Roles: Owner, Account Manager

Related Templates: Template 9 (Complaints & Credits)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
At-risk identification	Account Manager	Any of: 3+ complaints in 90 days, missed payments, competitor contact, verbal dissatisfaction.	escalate to Owner All at risk identifications automatically.	Owner: briefed weekly per A/M Role Card.
Retention strategy	Owner	Tier 1 or strategic account. Retention cost vs. lifetime value analysis.	N/A - Owner-level.	A/M executes agreed strategy. All communication coordinated.
Managed exit decision	Owner	Retention cost exceeds value. Relationship is unsalvageable. Client is consistently unprofitable.	N/A - Owner-level.	A/M manages transition. O/M adjusts schedule.

Step-by-Step Procedure

PHASE 1: EARLY WARNING IDENTIFICATION

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Account Manager	Monitor for at-risk signals: - 3+ complaints in 90 days - Payment delinquency > 60 days - Client mentions competitor by name - Verbal dissatisfaction or tone change - Declined enhancements 3x Flag in CRM as "At-Risk" immediately.	All at-risk flags go to Owner. No exceptions. This is not A/M authority to manage alone.	At-risk accounts briefed to Owner weekly (A/M Role Card: "I Always").
2	Account Manager	Prepare at-risk brief for Owner: - Complete complaint and credit history - Annual revenue and contract terms - Quality scores and service history - Competitive intelligence (if known) - A/M assessment and recommendation	N/A - preparing for Owner review.	Brief ready before weekly at-risk update to Owner.

PHASE 2: OWNER ENGAGEMENT

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Owner	Review at-risk brief. Make direct contact with client within 48 hours of identification. Listen first. Assess: Is this recoverable? What would it take to retain?	Client uses legal language or formally requests cancellation. Involve counsel if needed.	Wednesday Ops Review: active at-risk accounts. Quarterly Assessment: all outcomes.
4	Owner	Choose strategy: A) Enhanced service (crew upgrade, additional visits, priority routing) B) Price adjustment (per SOP-004) C) Executive relationship (regular Owner check-ins) D) Managed exit (see Step 6) Document strategy in CRM.	Retention strategy requires investment > \$2,000/year in additional service cost.	Retention cost tracked against client lifetime value at Quarterly Assessment.

PHASE 3: EXECUTION AND RESOLUTION

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
5	Account Manager	Execute retention strategy: Coordinate with O/M on service changes. Communicate plan to client with specific commitments and timeline. Schedule 30-day and 60-day check-ins. Document all touchpoints in CRM.	Client dissatisfaction continues despite retention efforts. Return to Step 3.	30/60-day check-ins on A/M calendar. Friday Close-Out: client pulse.
6	Owner + A/M	IF MANAGED EXIT: A/M communicates professionally. Offer 30-day transition. Conduct exit interview: what would have kept you? Document reasons. O/M removes from schedule. Update revenue forecast.	Client disputes final invoice or demands refund. Owner handles.	Exit data feeds Monthly and Quarterly reviews for pattern analysis.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
At-risk identification (days before cancellation)	_____ days	> 60 days early	CRM flags	Weekly
At-risk save rate	_____ %	> 50%	CRM outcomes	Monthly
Owner response time to at-risk flag	_____ days	< 48 hours	CRM activity log	Weekly
Exit interviews completed	_____ %	100%	CRM log	Monthly
Revenue protected (saved accounts)	\$_____	Track only	CRM outcomes	Quarterly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

THE CLIENT MANAGEMENT PRINCIPLE:

Every SOP in this section exists to answer one question: Does the Account Manager have the clarity, criteria, and authority to handle this without calling the owner? If yes, the system is working. If no, refine the criteria. Do not add more approvals. Add more clarity.



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Field Operations SOPs

SOPs 010 through 015 cover the daily field decisions that drive productivity, quality, and safety. These are the highest-frequency decisions in a landscape company and the ones most likely to generate a phone call to the owner at 6 AM. Each procedure gives your Ops Manager and Crew Leaders clear authority to act within defined criteria so the operation runs whether the owner is available or not.

SOP #	Title	Primary Template
SOP-010	Daily Crew Dispatch	Template 5 (Crew Assignments)
SOP-011	Weather Delay Protocol	Template 6 (Schedule Changes)
SOP-012	Quality Inspections	Template 11 (Quality Issues)
SOP-013	Property Damage Response	Template 8 (Safety), Template
SOP-014	Irrigation Break Handling	Template 1 (Equipment)
SOP-015	Site Safety Incident	Template 8 (Safety Incidents)

Calibrated for \$6M-\$10M landscape operations. Adjust thresholds up or down for your revenue stage.

SOP-010 | Daily Crew Dispatch

Purpose

Daily crew dispatch is the single highest-volume decision in a landscape company. Route assignments, crew deployment, and last-minute changes generate more owner interruptions than any other process. This SOP puts routing authority squarely in the Ops Manager's hands with clear criteria for skill matching, drive time, and Tier 1 priority.

Primary Roles: Ops Manager, Crew Leaders

Related Templates: Template 5 (Crew Assignments & Routing)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Daily routing & assignment	Ops Manager	Balance drive time, skill match, Tier 1 priority. Crew leaders informed by 6 AM.	Key account needs specific crew and crew is unavailable.	Crew leaders daily. A/M on Tier 1 changes.
Mid-day crew swap	Ops Manager	Driven by call-out or emergency. Maintain Tier 1 coverage first.	Swap affects multiple routes or creates service gap.	A/M & crew leaders notified immediately.
Daily task assignment within crew	Crew Leader	Assign based on skill, efficiency, development needs.	Performance issue requiring formal conversation.	N/A: standard daily leadership.

Step-by-Step Procedure

PHASE 1: PRE-DAY SETUP (BY 5:45 AM)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Ops Manager	Review next-day routes (prepared Friday). Check for call-outs, equipment issues, weather changes since Friday prep. Adjust assignments if needed. Confirm all crews have equipment.	Multiple call-outs leave route uncovered. Key account crew leader called out.	Friday: prep next week routes before leaving. Monday Standup: confirm.
2	Crew Leaders	Brief crew before leaving shop. Confirm route, property priorities, Tier 1 requirements. Pre-check equipment per daily checklist. Depart on time.	Equipment failure preventing departure. Crew member no-show at shop.	End-of-day numbers reported to O/M.

PHASE 2: MID-DAY MANAGEMENT

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Ops Manager	Monitor progress by midday check-in. If crew is behind, assess cause: scope creep, conditions, or efficiency. Redeploy resources if Tier 1 at risk.	Multiple routes behind. Tier 1 property will be missed today.	Wednesday review: mid-day intervention frequency and causes.
4	Crew Leaders	Complete all properties to quality standard. Walk property before and after service. Document Tier 1 with photos. Report end-of-day numbers to O/M. Prep for tomorrow before leaving.	Property cannot be serviced (access, safety). Client present requesting contract changes.	Escalation count to O/M tracked on KPI Dashboard.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Routes completed on schedule	----- %	> 90%	Scheduling system	Wednesday
Drive time efficiency	----- min/stop	Trending down	GPS / routing data	Monthly
Mid-day redeployments	----- /wk	< 3 per week	O/M daily log	Wednesday
Crew departure time	----- AM	By 6:30 AM	Shop check-in	Daily

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

SOP-011 | Weather Delay Protocol

Purpose

Weather delays are the most frequent source of schedule disruption in landscape operations. Without a clear protocol, every rain day generates a cascade of phone calls to the owner about what to reschedule, who to notify, and which clients take priority. This SOP pushes those decisions to the Ops Manager with clear criteria for when the owner needs to get involved.

Primary Roles: Ops Manager, Account Manager

Related Templates: Template 6 (Schedule Changes), Template 5 (Crew Assignments)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Rain delay - same-day adjustment	Ops Manager	Push to next available day. Tier 1 priority. Notify clients of 2+ day delays.	Rain extends beyond 2 consecutive days.	A/M and Crew Leaders by end of day.
Call-out / no-show coverage	Ops Manager	Redistribute to maintain critical routes first, then by client tier.	No coverage available and Tier 1 account is affected.	A/M notified on any Tier 1 impact.
Multi-day schedule rebuild	Owner + Ops Mgr	Collaborate. Assess revenue impact. Coordinate client communication.	N/A - collaborative decision.	All staff and affected clients informed.

Step-by-Step Procedure

PHASE 1: WEATHER ASSESSMENT (BY 5:30 AM)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Ops Manager	Check weather by 5:30 AM. Decision: Go, Delay, or Cancel. If Delay: set reassessment time. Notify all crew leaders by 6:00 AM. Activate weather protocol communication tree.	Forecast shows 3+ consecutive rain days: notify Owner for multi-day rebuild.	Monday Standup: review weather outlook for week.
2	Ops Manager	Reprioritize schedule using Tier system: Tier 1 accounts get first available slot. Tier 2 pushed by one service cycle. Document all changes in scheduling system.	Tier 1 account will miss contractual service window. A/M needs to make proactive call.	Wednesday review: assess week recovery. Friday: wins/misses.

PHASE 2: CLIENT COMMUNICATION (WITHIN 2 HOURS)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Account Manager	Notify Tier 1 clients of any delay by phone. Tier 2 clients: email/text notification. Language: "Due to weather, your service is rescheduled to [date]. No action needed on your part."	Client expresses frustration about repeated delays: track for pattern analysis.	Friday Close-Out: client pulse on weather response.
4	Ops Manager	Assign indoor/shop work for idle crews: equipment maintenance, vehicle cleaning, training modules, shop organization. Track non-billable hours by crew.	Rain day extends to 3+ days: assess overtime needs for catch-up week.	Wednesday review: non-billable hours and recovery plan.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Weather decision time	_____ min	< 30 min by 5:30 AM	O/M daily log	Wednesday
Tier 1 notification time	_____ hrs	< 2 hours	CRM activity log	Wednesday
Schedule recovery days	_____ days	< 3 days post-event	Scheduling system	Friday
Non-billable rain hours	_____ hrs	Trending down	Payroll report	Monthly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

SOP-012 | Quality Inspections

Purpose

Quality in a landscape company is not a feeling. It is a number. Without a structured inspection process tied to specific standards, "quality" means whatever the owner thought it meant the last time they drove by a property. This SOP connects the Property Service Form, the 10-point Quality Checklist, and the tier-based scoring system into an inspection process that runs without the owner in the truck.

Primary Roles: Ops Manager, Crew Leaders

Related Templates: Template 11 (Quality Issues & Rework)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Property fails quality check	Crew Leader	Fix before leaving if below standard. Track rework hours by crew.	Rework impacts other scheduled clients this day.	A/M and O/M informed immediately.
Systemic quality pattern	Ops Manager	Root cause analysis. Crew reassignment or retraining protocol.	Pattern persists after two corrective actions.	Owner informed of findings and corrective plan.
Quality standard adjustment	Ops Mgr + A/M	Based on walkthrough data, client feedback, and seasonal conditions.	Standard change affects multiple clients or contract commitments.	Owner: informed via Wednesday Ops Review.

Step-by-Step Procedure

PHASE 1: ON-SITE QUALITY CHECK (EVERY PROPERTY)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Crew Leader	Before leaving any property, walk the 10-point Quality Checklist: mowing, edging, blowing, trimming, beds, debris, scalping, gates, equipment marks, curb appeal. Score against tier standard.	Score below tier standard and rework would cause next property to be late.	Quality scores reported end-of-day to O/M.
2	Crew Leader	If below standard: fix before leaving. Document rework time on Property Service Form. Take photo of completed work for Tier 1 properties. Note root cause of quality miss.	Cannot complete rework due to equipment failure or weather change.	Rework hours tracked on KPI Dashboard.

PHASE 2: OPS MANAGER FIELD INSPECTIONS

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Ops Manager	Visit minimum 6 properties per week (per Role Card). Score independently. Compare O/M score to Crew Leader score. Identify calibration gaps. Coach Crew Leader on-site if gap > 1 point.	Crew Leader consistently scoring 2+ points above O/M score (over-reporting quality).	Wednesday Ops Review: property scores and crew calibration.
4	Ops Manager	If crew shows pattern of quality misses (3+ properties below standard in 2 weeks): conduct root cause analysis. Is it training, equipment, time allocation, or attitude? Build corrective plan.	Pattern persists after two corrective actions. Crew reassignment or formal performance conversation needed.	Monthly Decision Review: crew quality patterns. Criteria adjustments.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Average property quality score	----- /10	> 8.5 average	Property Service Forms	Wednesday
Rework hours per crew per week	----- hrs	Trending down	KPI Dashboard	Wednesday
O/M field inspections per week	----- /wk	> 6 per week	O/M visit log	Wednesday
Crew-to-O/M score calibration gap	----- pts	< 0.5 points	Inspection comparison	Wednesday

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

SOP-013 | Property Damage Response

Purpose

Property damage is the field situation most likely to generate panic, bad decisions, and an immediate call to the owner. A broken window, a damaged irrigation head, a scraped fence. Without a clear protocol, crew members either hide the damage or freeze. This SOP gives them a structured response that protects the client relationship and limits liability.

Primary Roles: Crew Leader, Ops Manager, Account Manager

Related Templates: Template 8 (Safety), Template 9 (Complaints & Credits)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Minor damage (cosmetic, < \$200 estimated repair)	Crew Leader	Document immediately with photos. Notify A/M same day. Do not attempt repair unless qualified.	Any structural damage. Client is present and upset. Damage to vehicle, building, or utility.	A/M notified same day. O/M informed via end-of-day report.
Moderate damage (\$200-\$1,000 estimated)	Account Manager	Contact client within 4 hours. Arrange repair through approved vendor. A/M approval < \$500	Repair estimate > \$500. Client demands immediate resolution beyond A/M authority.	Owner: weekly client report. O/M: same day.
Major damage / liability risk	Owner	Any structural damage, utility strike, vehicle damage, or potential injury. Insurance notification required.	N/A - Owner-level. All major damage escalates immediately.	All parties informed within 1 hour. Insurance carrier notified.

Client demands

Step-by-Step Procedure

PHASE 1: IMMEDIATE RESPONSE (ON-SITE)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Crew Leader	STOP. Secure the area if safety concern. Photograph the damage from multiple angles BEFORE touching anything. Document: what happened, what equipment was involved, who was operating.	Any injury: go to SOP-015 immediately. Utility strike (gas, electric, water): evacuate and call 911.	End-of-day report to O/M includes all damage incidents.
2	Crew Leader	Notify Ops Manager immediately by phone. Provide: property address, description, photos, and damage estimate if possible. Do NOT attempt repair unless qualified and specifically authorized.	Cannot reach O/M: call A/M directly. Cannot reach anyone: document and continue route.	O/M logs in daily incident tracker.

PHASE 2: CLIENT COMMUNICATION AND RESOLUTION

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Account Manager	Contact client within 4 hours of incident. Own it. Do not blame the crew. Language: "We damaged [item] during service today. We are going to make this right. Here is what happens next." Schedule repair or provide credit.	Client is extremely upset, threatens legal action, or damage exceeds \$500. Escalate to Owner.	Friday Close-Out: damage incidents as misses. Lessons learned.
4	Ops Manager	Conduct crew debrief within 24 hours. Root cause: operator error, equipment malfunction, site condition, or training gap? Document in incident file. Implement preventive measure.	Same crew causes damage 2x in 30 days: formal performance conversation. Equipment malfunction: remove from rotation.	Wednesday Ops Review: open damage incidents. Monthly: damage trends.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Property damage incidents per month	_____ /mo	Trending down	Incident tracker	Monthly
Client notification within 4 hours	_____ %	100%	CRM activity log	Wednesday
Damage cost per month	\$_____ /mo	Trending down	Incident tracker	Monthly
Repeat damage (same crew, 30 days)	_____ /mo	Zero	Incident tracker	Monthly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

SOP-014 | Irrigation Break Handling

Purpose

Irrigation breaks during service are inevitable. A mower clips a head, a string trimmer catches a line, or you uncover a pre-existing leak. The question is not whether it will happen but whether your crew knows exactly what to do when it does. This SOP prevents a \$15 sprinkler head from becoming a \$500 water damage claim.

Primary Roles: Crew Leader, Ops Manager

Related Templates: Template 1 (Equipment Purchases), Template 12 (Equipment Breakdown)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Minor break (head, riser, lateral line - crew can fix)	Crew Leader	Parts on hand or available within 30 min. Crew has skill. Repair < \$150 in parts. Fix time < 30 minutes.	Repair exceeds 30 min or parts > \$150. Main line or backflow involved.	O/M notified via text. A/M notified if client is present.
Moderate break (zone line, valve, complex repair)	Ops Manager	Authorized repair up to \$500. Approved vendor if crew cannot complete. Same-day or next-day resolution.	Repair estimate > \$500. Multiple zones affected. Property flooding risk.	Owner: weekly equipment report. A/M: same day if client-facing.
Major break (main line, backflow, water intrusion)	Owner	Shut water off immediately. Call approved irrigation sub. Insurance notification if property damage risk.	N/A - Owner-level.	All parties notified within 1 hour. Client contacted by A/M immediately.

Step-by-Step Procedure

PHASE 1: IMMEDIATE RESPONSE

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Crew Leader	Identify break severity. If water is flowing: shut off zone valve or main shut-off immediately. Do not leave water running while you assess. Photograph the break before repair.	Cannot locate shut-off. Water flowing toward building or hardscape. Call O/M immediately.	All irrigation incidents logged on Property Service Form.
2	Crew Leader	FOR MINOR BREAKS: Repair on-site if parts available and within criteria. Test zone after repair. Photograph completed repair. Document on Property Service Form with time spent.	Repair taking > 30 min. Parts not available. Break is more extensive than initially assessed.	Repair cost tracked for weekly equipment report.

PHASE 2: ESCALATED REPAIRS

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Ops Manager	FOR MODERATE BREAKS: Dispatch approved irrigation vendor or reassign qualified crew. Authorize repair up to \$500. Confirm resolution timeline. Notify A/M for client communication.	Estimate > \$500. Multiple zones affected. Vendor unavailable same day.	Wednesday Ops Review: open irrigation repairs.
4	Account Manager	Notify client of the situation and timeline. If crew-caused: own it per SOP-013. If pre-existing: document and present repair proposal as enhancement. Follow up after repair is complete.	Client disputes that break was pre-existing. Repair cost disputed. Escalate to Owner.	Enhancement proposals from irrigation discoveries tracked.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Irrigation breaks per month	_____/mo	Trending down	Incident tracker	Monthly
On-site repair rate (crew-fixed)	_____%	> 60%	Property Service Forms	Wednesday
Average repair cost	\$_____/incident	Trending down	Equipment report	Monthly
Enhancement revenue from irrigation finds	\$_____/mo	Trending up	Sales pipeline	Monthly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

SOP-015 | Site Safety Incident

Purpose

Safety is the one area where authority is absolute and non-negotiable. Any crew member, at any time, can stop work for any safety concern without asking permission. Period. This SOP covers the response protocol when a safety incident occurs, from a minor cut to a serious injury, and ensures every incident is documented, reported, and reviewed.

Primary Roles: Crew Leader (Absolute Authority), Ops Manager,

Related Templates: Owner Template 8 (Safety Incidents)

ABSOLUTE AUTHORITY:
Any crew member who believes a condition is unsafe has absolute authority to stop work. No approval required. No questions asked. Ever. This authority cannot be overridden by any manager, any client, or any schedule pressure. Report as soon as safe to do so.

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Stop work - unsafe condition	Crew Leader (Absolute)	ANY condition believed unsafe. No approval required. Ever.	Never - stopping is always authorized. Always report.	O/M and Owner informed as soon as safe to do so.
Injury response	Ops Manager	Follow incident protocol. Ensure medical attention. Document same day.	Any injury requiring medical attention beyond first aid.	Owner informed immediately. I/R same day.
Equipment safety removal	Crew Leader	Remove from rotation if any safety check fails. No approval required.	Removal affects next-day crew deployment.	O/M notified. Owner if client loss at risk.

Step-by-Step Procedure

PHASE 1: IMMEDIATE RESPONSE (FIRST 15 MINUTES)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Crew Leader	STOP ALL WORK. Assess the situation. If injury: ensure medical attention first. Call 911 if needed. Do not move injured person unless immediate danger. Secure the scene.	Any injury beyond basic first aid: call 911 and O/M simultaneously. Do not delay medical care for any reason.	All safety incidents reported same day regardless of severity.
2	Crew Leader	Once scene is secure and any injured person is receiving care: Call Ops Manager immediately. Provide: location, what happened, who is involved, current status. Do not leave the scene.	Cannot reach O/M: call Owner directly. This is the one situation where direct-to-Owner is always appropriate.	O/M logs in incident tracker within 1 hour.

PHASE 2: DOCUMENTATION AND NOTIFICATION

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Ops Manager	Arrive on-site if possible. If not, manage by phone. Document everything: photos, witness statements, timeline. Complete incident report same day. Secure any involved equipment.	Serious injury: Owner notified immediately. Insurance carrier notified same day. Legal counsel if potential liability.	Wednesday Ops Review: open safety incidents. All incidents reviewed.
4	Ops Manager	Notify Owner with complete incident report. If worker injury: ensure workers comp process is initiated same day. If property/client impact: coordinate with A/M for client communication.	OSHA-reportable incident. Media involvement. Legal claim threatened.	Owner briefed same day. Insurance carrier notified per policy.

PHASE 3: REVIEW AND PREVENTION

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
5	Ops Manager + Owner	Conduct incident review within 72 hours. Root cause analysis: Was it preventable? Training gap? Equipment failure? Process failure? Site condition? Document findings and corrective action.	Incident reveals systemic safety issue affecting multiple crews or sites.	Monthly Decision Review: all safety incidents. Quarterly: safety audit.
6	Ops Manager	Implement corrective action: training, equipment change, process update, or site-specific protocol. Communicate to all crews within 5 days. Update relevant SOPs if needed.	Corrective action requires significant investment or policy change.	Friday Close-Out: safety as standing agenda item.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Safety incidents per month	----- /mo	Zero (goal)	Incident tracker	Monthly
Incident report completed same day	----- %	100%	Incident tracker	Weekly
Root cause review within 72 hours	----- %	100%	Incident file	Weekly
Days since last reportable incident	----- days	Trending up	Safety board	Daily
Stop-work authority exercised (no blame)	----- /mo	Track only (never punish)	Incident tracker	Monthly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

THE FIELD OPERATIONS PRINCIPLE:

Every SOP in this section exists to keep the operation moving without the owner in the truck. Your Ops Manager owns the daily rhythm. Your Crew Leaders own the quality standard and safety authority. When the criteria are clear and the authority is real, your field teams stop calling and start deciding. That is the goal.



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Financial Control SOPs

SOPs 020 through 024 cover the financial decisions that most frequently bottleneck at the owner level. Credits, invoice disputes, budget variances, subcontractor approvals, and equipment purchases all share the same pattern: someone needs to spend money or authorize a cost, and nobody knows how much they are allowed to approve without a phone call. These SOPs put dollar thresholds, approval criteria, and escalation triggers in writing so your managers protect your margins while keeping the operation moving.

SOP #	Title	Primary Template
SOP-020	Credit Authorization	Template 9 (Complaints & Credits)
SOP-021	Invoice Disputes	Template 3 (Pricing)
SOP-022	Budget Variance Response	Template 10 (Budget Variances)
SOP-023	Subcontractor Approval	Template 13 (Subcontractor Use)
SOP-024	Equipment Purchase	Template 1 (Equipment Purchases)

Calibrated for \$6M-\$10M landscape operations. Adjust thresholds up or down for your revenue stage.

SOP-020 | Credit Authorization

Purpose

Credits are where margin leaks hide. Without a structured authorization process, credits get issued reactively, inconsistently, and without documentation. Some Account Managers give away too much. Others give away nothing and lose clients. This SOP creates a consistent credit framework with clear dollar thresholds, documentation requirements, and pattern tracking.

Primary Roles: Account Manager, Owner

Related Templates: Template 9 (Complaints & Credits)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Service credit up to \$200	Account Manager	Valid complaint. Documented in CRM. Recent visit within 7 days. Photo evidence.	Credit > \$200 or 2nd credit to same client < 60 days.	Owner: weekly client report with credit summary.
Credit \$200-\$500	Ops Manager + A/M	Joint review. Root cause identified. Client history reviewed. Documentation complete.	Credit > \$500 or pattern of credits to same client (3+ in 90 days).	Owner: informed before credit issued. Weekly report.
Credit exceeding \$500	Owner	Full client file review. Revenue impact analysis. Retention value assessment.	N/A - Owner-level.	A/M documents outcome and reasoning in CRM.

Step-by-Step Procedure

PHASE 1: CREDIT REQUEST ASSESSMENT

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Account Manager	Receive credit request or identify need. Verify: Is the complaint valid? Pull Property Service Form and photos. Check CRM for credit history: how many credits in last 90 days? Total credit dollars this client YTD?	3+ credits to same client in 90 days regardless of amount. Pattern triggers joint A/M + O/M review.	Credit requests logged in CRM immediately. Weekly credit summary for Owner.
2	Account Manager	Determine credit amount needed. If under \$200 and criteria met: process at A/M authority level. Apply credit to next invoice. Document: reason, amount, resolution. Notify client of credit applied.	Credit would exceed \$200. 2nd credit to this client within 60 days. Either condition: escalate.	Monthly credit total tracked on A/M Role Card metrics.

PHASE 2: ESCALATED CREDIT APPROVAL

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	A/M + Ops Mgr	FOR \$200-\$500: Joint review of situation. Confirm root cause is identified. Review client history and revenue value. Agree on credit amount and any corrective action to prevent recurrence. Document joint decision in CRM.	Cannot agree on amount. Root cause is systemic. Credit > \$500 needed.	Wednesday Ops Review: escalated credits. Criteria calibration.
4	Owner	FOR > \$500: Review complete client file. Assess: Is this a retention play or a legitimate service failure? What is the client worth annually vs. credit amount? Decide and document reasoning. A/M communicates to client.	N/A - Owner-level. Legal review if client threatens action over service quality.	Monthly Decision Review: credit patterns and threshold adjustments.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Monthly credit total	\$_____	Trending down	A/M Role Card	Monthly
Credits per client (90-day rolling)	_____	< 2 per client	CRM report	Wednesday
Average credit amount	\$_____	Trending down	CRM report	Monthly
Credits issued without documentation	_____ /mo	Zero	CRM audit	Monthly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

SOP-021 | Invoice Disputes

Purpose

Invoice disputes are a relationship test disguised as a billing question. Handle them quickly and fairly, and you strengthen the client relationship. Let them linger, and you lose the client, the revenue, and your reputation. This SOP gives your Account Manager a clear process for resolving disputes at their level while protecting your cash flow.

Primary Roles: Account Manager, Owner

Related Templates: Template 3 (Client Pricing)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Billing error (company mistake)	Account Manager	Error is verifiable in system. Correct and reissue invoice. No approval needed for corrections.	Error pattern across multiple clients suggests systemic billing issue.	Owner: informed via weekly A/R aging report.
Scope dispute (client disagrees with charges)	Account Manager	Review contract, change orders and service records. Present documentation to client. Resolve within 14 days.	Client disputes contract terms themselves. Dispute > \$1,000. Client withholds payment.	Owner: informed before any contract modification.
Payment plan or write-off	Owner	Client > 60 days past due. Collection efforts documented. Revenue impact assessed.	N/A - Owner-level.	A/M provides complete A/R history and client context.

Step-by-Step Procedure

PHASE 1: DISPUTE INTAKE AND VERIFICATION

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Account Manager	Receive dispute from client or identify from A/R aging report. Categorize: A) Billing error (our mistake) B) Scope dispute (client disagrees) C) Payment issue (client cannot/will not pay) Pull all supporting documentation.	Client withholds payment on multiple invoices. Balance exceeds \$2,000 past due.	A/R aging reviewed at Wednesday Ops Review.
2	Account Manager	FOR TYPE A: Verify error. Correct invoice. Reissue and notify client with apology. Document error type for process improvement. If pattern: flag to O/M for billing process review.	Same billing error type occurring 3+ times in 60 days: systemic issue.	Billing errors tracked for Monthly Decision Review

PHASE 2: DISPUTE RESOLUTION

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Account Manager	FOR TYPE B: Present documentation to client. Contract, signed change orders, service records, Property Service Forms. Language: "Here is what we agreed to and here is what we delivered." Negotiate resolution within 14 days.	Client disputes contract terms. Dispute > \$1,000. Client threatens to leave over billing issue.	Open disputes on weekly A/R report. Friday Close-Out: client pulse.
4	Owner	FOR TYPE C: Review complete A/R file. Options: payment plan, partial write-off, collections, or managed exit. Consider: client value, relationship, and precedent being set. A/M executes agreed approach.	N/A - Owner-level. Legal counsel if balance exceeds \$5,000 and collection is needed.	Monthly Decision Review: A/R aging and write-off patterns.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Invoice disputes resolved within 14 days	_____ %	> 90%	CRM / A/R system	Wednesday
A/R > 60 days as % of revenue	_____ %	< 5%	A/R aging report	Wednesday
Billing errors per month	_____ /mo	Trending down	A/R system	Monthly
Revenue written off per quarter	\$_____	Trending down	Financial reports	Quarterly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

SOP-022 | Budget Variance Response

Purpose

Budget variances are the early warning system for profitability problems. A 10% labor overage in week three becomes a 15% margin miss by month end if nobody acts. This SOP gives your Ops Manager clear criteria for when a variance is normal (seasonal, one-time) and when it requires investigation and corrective action, keeping the owner focused on strategic decisions instead of chasing weekly numbers.

Primary Roles: Ops Manager, Owner

Related Templates: Template 10 (Budget Variances)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Job variance within 10%	Ops Manager	Identify cause. Document in weekly ops report. No action if seasonal or one-time.	Variance exceeds 10% or is structural (not seasonal).	Owner sees in Wednesday dashboard review.
Company margin miss 2+ months	Owner	Review revenue, labor, equipment spend, and overhead drivers.	N/A - Owner-level.	O/M & Controller present root cause and 30-day plan.
Budget reallocation or spending freeze	Owner	Structural cost issue identified. Revenue shortfall or margin compression.	N/A - Owner-level.	All managers informed of changes to spending authority.

Step-by-Step Procedure

PHASE 1: WEEKLY VARIANCE MONITORING

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Ops Manager	Review job-level profitability weekly. Compare actual labor hours, materials, and subcontractor costs to estimates. Flag any job with variance > 10%. Categorize: seasonal, one-time, or structural.	3+ jobs with > 10% variance in same category (labor, materials, etc.). Trending in wrong direction 3 consecutive weeks.	Dashboard updated before Wednesday Ops Review. KPI #3: OT spend vs. budget.
2	Ops Manager	For structural variances: investigate. Is it crew efficiency? Scope creep? Estimating error? Material price change? Document findings and corrective action. Implement within current authority.	Corrective action requires spending (new equipment, additional crew, training) or affects client pricing.	Wednesday Ops Review: variance discussion. Friday: corrective action status.

PHASE 2: ESCALATED VARIANCE RESPONSE

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Owner + Ops Mgr	FOR COMPANY-LEVEL MARGIN MISS: O/M and Controller present root cause analysis to Owner. Review: labor as % of revenue, overhead trends, equipment costs, and revenue per hour. Build 30-day corrective plan together.	Margin miss persists after 30-day plan. Cash flow impact on operations or payroll.	Monthly Decision Review: P&L walkthrough. Quarterly Assessment: trend analysis.
4	Owner	If structural issue confirmed: decide on response. Options: spending freeze on discretionary items, rate card adjustment, crew restructuring, overhead reduction, or revenue acceleration plan. Communicate changes to all managers.	N/A - Owner-level.	All managers briefed on spending changes. Monday Standup: reinforce priorities.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Jobs within 10% of estimate	_____ %	> 80%	Job costing report	Wednesday
Overtime spend vs. budget	_____ %	+/- 10%	KPI Dashboard (#3)	Wednesday
Labor as % of revenue	_____ %	< 45%	Financial reports	Monthly
Revenue per labor hour	\$_____	Trending up	KPI Dashboard (#4)	Wednesday

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

SOP-023 | Subcontractor Approval

Purpose

Subcontractors extend your capacity but also extend your risk. Every sub on a client property represents your brand. Without a structured approval process, the Ops Manager either waits for the owner to approve every sub-request or makes the call alone without documentation. This SOP creates an approved vendor list with clear spending authority at each level.

Primary Roles: Ops Manager, Owner

Related Templates: Template 13 (Subcontractor Use)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Approved sub - under \$5,000	Ops Manager	On approved list. Insurance current. Scope documented. Cost < 10% of internal estimate.	Cost > \$5,000 or involves Tier 1 client.	Owner: weekly subcontractor report.
New sub or spend over \$5,000	Owner	Verify references, insurance, and prior track record. Full scope documentation required.	N/A - Owner-level.	O/M coordinates execution and monitors quality.
Emergency sub (same-day need)	Ops Manager	Approved list only. Document after the fact within 24 hours. Spend limit: \$2,500 emergency authority.	Emergency spend > \$2,500. No approved sub available for the scope needed.	Owner: notified same day by text. Full documentation within 24 hours.

Step-by-Step Procedure

PHASE 1: SUB REQUEST AND APPROVAL

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Ops Manager	Identify need for subcontractor. Check approved vendor list first. Verify: insurance current? Scope match? Availability for timeline needed? Get written estimate before committing.	No approved sub available for scope needed. Need to vet a new vendor. Owner approval required for new vendors.	Subcontractor usage reported in Wednesday Ops Review.
2	Ops Manager	FOR APPROVED SUB UNDER \$5,000: Authorize the work. Document: scope, timeline, cost, and property. Provide sub with quality expectations and client communication protocol. Monitor execution.	Sub cost exceeds estimate by > 15%. Quality does not meet standard. Sub misses timeline.	Weekly subcontractor report to Owner. Cost tracked against job budget.

PHASE 2: NEW VENDOR AND LARGE SPEND APPROVAL

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Owner	FOR NEW VENDOR: Review references, insurance certificates, portfolio/past work. Conduct phone reference check (minimum 2). Approve or deny for approved list. Set initial spending limit for new vendor.	N/A - Owner-level. Legal review if contract terms are non-standard.	Approved vendor list reviewed quarterly. New additions noted at Monthly Review.
4	Owner	FOR SPEND > \$5,000: Review scope, estimates (minimum 2 for > \$10,000), client context, and timeline. Approve, modify, or find alternative. O/M manages execution and quality monitoring.	N/A - Owner-level.	Large sub projects on Wednesday Ops Review until complete.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Subcontractor spend vs. budget	\$_____	Within 10%	Job costing report	Wednesday
Approved vendor insurance compliance	_____ %	100% current	Vendor file	Quarterly
Sub quality issues per month	_____ /mo	< 1 per month	Incident tracker	Monthly
Emergency sub requests per month	_____ /mo	Trending down	O/M daily log	Monthly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

SOP-024 | Equipment Purchase

Purpose

Equipment purchasing is where some of the biggest dollars in a landscape company flow through the fewest controls. A crew leader buys supplies, an ops manager approves a repair, and a rental shows up on the credit card statement. Without clear thresholds at each level, spending either bottlenecks at the owner (who approves every \$75 purchase) or runs unchecked. This SOP establishes a tiered spending authority that allows the operation to move while protecting the budget.

Primary Roles: Crew Leader, Ops Manager, Owner

Related Templates: Template 1 (Equipment Purchases, Repairs & Rentals)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Field supplies & minor materials	Crew Leader	Must support active job. Under \$150/day. Approved vendor only.	Single purchase exceeds \$150.	Weekly summary to Ops Manager.
Repairs & rentals (up to \$1,500)	Ops Manager	Repair if < \$1,500 and < 40% of replacement value. Equipment < 5 years old. Rental within budget.	Repair > \$1,500 or same asset repaired twice within 60 days.	Owner: weekly equipment report.
Capital purchases above threshold	Owner	Review repair history, useful life, budget availability. Compare lease vs. buy.	N/A - Owner-level.	Ops Mgr/Accounting informed after decision.

Step-by-Step Procedure

PHASE 1: DAILY FIELD PURCHASING

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Crew Leader	Purchase field supplies as needed: fuel, trimmer line, blades, small parts. Approved vendors only. Under \$150/day. Keep all receipts. Document on daily log. Return receipts to O/M end of day.	Single purchase > \$150. Vendor not on approved list. Unusual or recurring purchase pattern.	Receipt reconciliation weekly. O/M reviews spending patterns.
2	Ops Manager	Review weekly field purchase receipts. Look for: spending patterns, unapproved vendors, unusual items, budget tracking. Address issues with Crew Leaders directly. File receipts for accounting.	Monthly field spending exceeding budget by > 15%. Unapproved vendor usage.	Wednesday Ops Review: equipment and supply spending.

PHASE 2: REPAIR AND RENTAL DECISIONS

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Ops Manager	FOR REPAIRS: Apply the 40% rule. If repair cost < 40% of replacement value AND equipment < 5 years old: repair. If not: flag for replacement consideration. Authorize repairs up to \$1,500.	Repair > \$1,500. Same equipment repaired 2x in 60 days. Equipment is critical to next-day ops.	Repair vs. replace decisions on weekly equipment report.
4	Ops Manager	FOR RENTALS: Verify need and timeline. Rental within approved budget. Document: reason, duration, cost, and which job/route requires it. Return rental on time to avoid overage.	Rental extends beyond original timeline. Total rental cost approaching purchase price.	Active rentals tracked on Wednesday Ops Review.

PHASE 3: CAPITAL PURCHASE APPROVAL

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
5	Ops Manager	Prepare capital purchase request for Owner: equipment needed, repair history on current asset, 2+ quotes, lease vs. buy analysis, budget impact, and timeline. Present at Wednesday Ops Review or Monthly Decision Review.	N/A - preparing for Owner decision.	Capital requests at Wednesday Ops Review or Monthly Decision Review.
6	Owner	Review request. Consider: budget availability, timing (season start vs. mid-season), fleet age and replacement cycle, financing options. Approve, defer, or find alternative. O/M executes approved purchase.	N/A - Owner-level.	Capital purchases tracked on equipment asset register. Quarterly fleet review.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Monthly equipment spend vs. budget	\$_____	+/- 10%	Equipment report	Wednesday
Field purchase compliance (approved vendors, < \$150)	_____ %	> 95%	Receipt audit	Monthly
Repair vs. replace decisions documented	_____ %	100%	Equipment report	Monthly
Equipment downtime days per month	_____ days	Trending down	O/M daily log	Monthly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

THE FINANCIAL CONTROL PRINCIPLE:

Every SOP in this section exists to answer one question: Does the person spending the money know exactly how much they are authorized to spend, under what conditions, and when the decision leaves their hands? If yes, the operation keeps moving, and the budget stays protected. If not, you either bottleneck every purchase at the owner or lose control of spending. Clear thresholds eliminate both problems.



Leadership Infrastructure SOPs

SOPs 030 through 034 are the meta-layer of your operating system. These are not about a specific client situation or field event. They are about how your leadership team hires, coaches, measures, escalates, and reviews decisions across the entire company. If the other SOPs are the engine, these are the maintenance schedule that keeps it running. Skip these and the rest of the system slowly degrades. Run these consistently and the framework gets stronger every month.

SOP #	Title	Primary Template
SOP-030	Hiring Approval Process	Template 7 (Hiring & Termination)
SOP-031	Crew Leader Coaching Cadence	Template 14 (Training)
SOP-032	KPI Dashboard Review	All Templates (cross-cutting)
SOP-033	Decision Escalation Protocol	All Templates (cross-cutting)
SOP-034	Monthly Decision Review	All Templates (cross-cutting)

Calibrated for \$6M-\$10M landscape operations. Adjust thresholds up or down for your revenue stage.

SOP-030 | Hiring Approval Process

Purpose

Hiring is where growth meets discipline. In a labor-short industry, the pressure to fill seats fast leads to bad hires, budget overruns, and the owner rubber-stamping every req because there is no criteria for who can approve what. This SOP separates seasonal crew hiring (Ops Manager authority) from management hires (Owner authority) with clear documentation and budget guardrails at each level.

Primary Roles: Ops Manager, Owner

Related Templates: Template 7 (Hiring & Termination)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Seasonal crew hire	Ops Manager	Within approved headcount budget. Documents a real gap. Position has been posted per standard process.	Hire exceeds approved headcount or budget. Candidate requires above-standard compensation.	Owner: weekly staff update.
Termination (crew level)	Owner	Full HR documentation complete. Policy violation on record. Progressive discipline followed.	N/A - Owner-level. Legal counsel if exposure exists.	HR file updated. O/M informed immediately.
Management hire	Owner	Position budgeted. Full interview process complete. Minimum 2 candidates interviewed.	N/A - Owner-level.	Ops Manager informed immediately.

Step-by-Step Procedure

PHASE 1: POSITION JUSTIFICATION

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Ops Manager	Identify staffing need. Document: what gap this hire fills, impact on routes if not filled, revenue supported by position, and budget availability. For seasonal: verify headcount budget. For management: prepare position profile.	Hire would exceed approved headcount budget. Position is new (not a backfill). Either requires Owner approval before posting.	Staffing needs reviewed at Monday Standup. Headcount budget at Monthly Decision Review.
2	Ops Manager	FOR SEASONAL CREW: Post position per standard channels. Screen candidates against minimum requirements. Conduct working interview (trial day). Make hire decision within authority. Complete all onboarding documentation.	Cannot fill position after 3 weeks of posting. Need to adjust compensation or source from new channels. Budget impact.	Open positions on Wednesday Ops Review until filled.

PHASE 2: MANAGEMENT HIRES AND TERMINATIONS

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Owner	FOR MANAGEMENT HIRES: Review position profile and budget impact. Approve posting. Participate in final interview round. Minimum 2 candidates before decision. Make offer with O/M input on operational fit and team dynamics.	N/A - Owner-level. Legal review of offer terms if non-standard compensation or non-compete involved.	Management hires at Monthly Decision Review. Onboarding plan at Wednesday Ops Review.
4	Owner	FOR TERMINATIONS: Review complete HR file. Confirm progressive discipline followed. Verify documentation is complete. Consult legal counsel if any exposure risk. O/M coordinates logistics (final pay, equipment return, crew reassignment).	N/A - Owner-level. Immediate termination (safety, theft, violence) skips progressive discipline but still requires Owner.	Termination debrief at next Wednesday Ops Review. Staffing impact assessed.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Time to fill (seasonal crew)	_____ days	< 14 days	Recruiting tracker	Wednesday
Time to fill (management)	_____ days	< 45 days	Recruiting tracker	Monthly
New hire 90-day retention rate	_____ %	> 75%	HR records	Quarterly
Headcount vs. approved budget	_____ / _____	Within budget	Payroll report	Monthly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

SOP-031 | Crew Leader Coaching Cadence

Purpose

Crew Leaders are the front line of your Decision Rights system. They are the people making 50+ micro-decisions per day on every property. If they are not being coached, calibrated, and developed weekly, the criteria in your matrix drift, and the quality of field decisions degrades. This SOP turns coaching from a sporadic event into a weekly system that builds crew leader judgment over time.

Primary Roles: Ops Manager

Related Templates: Template 14 (Training & Development)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Weekly coaching conversation	Ops Manager	Every Crew Leader, every week. 15-20 minutes. Focused on decisions made that week.	Crew Leader misses 2 consecutive coaching sessions without valid reason.	Owner: crew leader development progress on O/M Role Card.
Authority expansion for Crew Leader	Owner + Ops Mgr	Crew Leader demonstrates consistent judgment over 90+ days. Criteria mastery verified through decision audit.	N/A - joint decision at Monthly or Quarterly Review.	All managers informed of expanded authority. Role Card updated.
Crew Leader performance issue	Ops Manager	Documented pattern of poor judgment, quality misses, or criteria violations. Coaching has not resolved.	Formal performance conversation or PIP required. Owner informed.	Owner: informed before any formal performance action.

Step-by-Step Procedure

PHASE 1: WEEKLY COACHING SESSION (15-20 MINUTES)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Ops Manager	Prepare for coaching by reviewing: Crew Leader quality scores this week, escalation count, rework hours, OT usage, and any customer feedback (positive or negative). Identify 1-2 decisions to discuss.	No data available because Crew Leader has not been completing Property Service Forms or daily reports.	Coaching sessions are part of O/M Role Card "I Always" list. Weekly, non-negotiable.
2	Ops Manager	Conduct coaching conversation: 1) "What decisions did you make this week that you want to talk about?" 2) Review 1-2 decisions against criteria. Within matrix? Good call or miss? 3) "Anything you escalated that you think you could have handled?" 4) One specific thing to work on next week.	Crew Leader consistently unable to articulate their decision reasoning. May indicate training gap or confidence issue.	Coaching notes logged by O/M. Patterns feed Monthly Decision Review criteria adjustments.

PHASE 2: DEVELOPMENT AND AUTHORITY EXPANSION

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Ops Manager	Track development over 90-day cycles. Monitor: escalation frequency trending down, quality scores stable or improving, decision quality (correct calls vs. misses), and crew member feedback. Prepare authority expansion recommendation when earned.	Crew Leader is not progressing after 90 days of consistent coaching. May need role reassessment.	Quarterly Framework Assessment: "Who is ready for expanded authority?"
4	Owner Ops Mgr +	FOR AUTHORITY EXPANSION: Review O/M recommendation with evidence. Decision audit: sample 10 decisions from last 90 days. If judgment is consistent with criteria: approve expansion. Update Role Card. Conduct handoff conversation for new authority (per Handoff Conversation Guide).	Decision audit reveals inconsistency. Hold expansion and coach for another 90 days.	Authority expansions at Monthly or Quarterly Review. Handoff conversation within 1 week of approval.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Coaching sessions completed per week	----- /wk	100% (all CLs)	O/M coaching log	Wednesday
Crew Leader escalation frequency (trending)	----- /wk	Trending down	KPI Dashboard	Wednesday
Authority expansions granted (quarterly)	-----	Track only	Quarterly Review	Quarterly
Crew Leader 90-day retention rate	----- %	> 85%	HR records	Quarterly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

SOP-032 | KPI Dashboard Review

Purpose

The KPI Dashboard is the nervous system of your operating framework. Without a disciplined review process, it becomes a spreadsheet nobody looks at. This SOP ensures the dashboard gets updated before every Wednesday Ops Review and that the data drives actual decisions rather than just decorating a whiteboard.

Primary Roles: Ops Manager, Owner

Related Templates: All Templates (cross-cutting)

THE DASHBOARD RULE:
If this dashboard doesn't fit on one page, it is too complex. Start with the 5 core metrics. Add more over the first 90 days only if your team has mastered the first five. The Ops Manager owns data entry. You review it on Wednesday.

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Dashboard data entry and accuracy	Ops Manager	Update all 5 core metrics before Wednesday review. Data must be verifiable.	Data is missing or inaccurate 2 consecutive weeks.	Owner: reviews at Wednesday Ops Review.
KPI target adjustment	Owner + Ops Mgr	Based on 90-day trend data. Adjustments at Monthly or Quarterly Review only.	N/A - joint decision.	All managers informed of new targets.
Adding new metrics to dashboard	Owner	Only when team has mastered current metrics. Dashboard must still fit one page.	N/A - Owner-level.	Announced at Monthly Decision Review. O/M implements.

Step-by-Step Procedure

PHASE 1: WEEKLY DATA COLLECTION (MONDAY-TUESDAY)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Ops Manager	Collect data for all 5 core metrics: 1) Escalation frequency to owner 2) Client complaints per week 3) Overtime spend vs. budget 4) Revenue per labor hour 5) Complaint resolution time Plus any additional metrics added.	Cannot collect accurate data for a metric. Source system is unreliable. Flag to Owner for process fix.	Data collection is part of O/M Role Card "I Always" list. Updated before Wednesday.
2	Ops Manager	Enter data into dashboard. Compare to prior week and Day 90 target. Identify: which metrics moved in the right direction, which moved wrong, and which are flat. Prepare 1-2 talking points for Wednesday review.	Metric trending in wrong direction 3 consecutive weeks. Prepare root cause for Wednesday discussion.	Dashboard posted where team sees it daily. Physical board or shared screen.

PHASE 2: WEDNESDAY OPS REVIEW (DASHBOARD SEGMENT - 10 MIN)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Owner + Ops Mgr	Review dashboard together. "What moved? What did not?" For each metric off target: O/M presents hypothesis on cause. Owner asks: "What would you change?" Agree on 1-2 actions for the week.	Multiple metrics off target simultaneously. May indicate systemic issue rather than individual process failure.	This is the Dashboard Review segment of the Wednesday Ops Review (10 min of 30).
4	Ops Manager	Document agreed actions from review. Implement during remainder of week. Report results at next Wednesday review. If action did not move the metric: escalate to Monthly Decision Review for deeper analysis.	Same metric off target 4+ consecutive weeks despite corrective action. Structural issue requiring Owner-level intervention.	Friday Close-Out: did the action work? Monday Standup: carry forward if not.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Dashboard updated before Wednesday	----- %	100%	O/M compliance	Wednesday
Metrics trending toward target	----- / 5	> 3 of 5	Dashboard	Wednesday
Action items from review completed	----- %	> 80%	O/M action log	Wednesday
Dashboard reviewed every Wednesday	----- %	100% (no skips)	Meeting log	Weekly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By



SOP-033 | Decision Escalation Protocol

Purpose

Escalation is the release valve of the Decision Rights system. Without a clear protocol, people either escalate everything (owner bottleneck) or escalate nothing (leading to expensive mistakes). This SOP defines the universal escalation rules that apply across every other SOP in the playbook. It answers the question every employee has: "When exactly does this stop being my problem and start being someone else's?"

Primary Roles: All Roles

Related Templates: All Templates (cross-cutting)

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Standard escalation (within SOP criteria)	Role defined in each SOP	Follow the specific SOP escalation triggers. Each SOP defines its own thresholds.	Defined per SOP. See individual procedure.	Per SOP info flow requirements.
Situation not covered by any SOP	Next level up in chain	When no SOP exists for the situation: escalate with complete context. Do not guess.	Any novel situation not addressed by existing criteria.	Document for future SOP development at Monthly Review.
Emergency escalation (bypass chain)	Directly to Owner	Safety, legal exposure, media involvement, or client threatening immediate action.	Life safety. Legal threat. Media. Client at front door. Theft or fraud.	All parties informed after situation is stabilized.

Step-by-Step Procedure

PHASE 1: STANDARD ESCALATION (90% OF SITUATIONS)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Any Role	Recognize escalation trigger from the relevant SOP. Before escalating, gather: what happened, what you have already done, what decision is needed, and your recommendation. Never escalate a question. Escalate a situation with a recommendation.	Cannot identify which SOP applies. Go to Step 3 (novel situation protocol).	Escalation count tracked on KPI Dashboard metric #1.
2	Next Level Up	Receive escalation. Assess within your authority level. If within your criteria: make the decision and communicate back. If outside your criteria: escalate again with your recommendation added. Document the decision made.	Decision requires authority beyond your level. Add your recommendation and escalate to Owner.	Wednesday Ops Review: Decision Debrief. Were escalations handled correctly?

PHASE 2: NOVEL SITUATION (NO SOP EXISTS)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Any Role	Situation is not covered by any existing SOP. Do not improvise a major decision. Escalate to your direct manager with: complete context, options you see, and your recommended action. Document everything for future reference.	Cannot reach direct manager and situation requires immediate action. Use best judgment, document, fully debrief ASAP.	Monday Standup: flag novel situations. Monthly Review: should this become an SOP?
4	Owner or Ops Mgr	Resolve the novel situation. After resolution, ask: "Will this happen again?" If yes: assign someone to draft SOP criteria for this situation type. Add to next Monthly Decision Review for formal adoption into the playbook.	N/A - this is the resolution step.	Monthly Decision Review: new SOP proposals. Criteria Evolution Log updated.

PHASE 3: EMERGENCY ESCALATION (BYPASS CHAIN)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
5	Any Role	EMERGENCY situations bypass the normal chain. Go directly to Owner for: <ul style="list-style-type: none"> - Any life safety situation - Legal threat or lawsuit - Media involvement or public incident - Client at the office demanding action - Theft, fraud, or criminal activity Call. Do not text. Do not email.	Cannot reach Owner. Call the next senior person available. For life safety: call 911 first, then Owner.	All emergency escalations reviewed at next Wednesday Ops Review. Process improvements implemented.

Decision Authority Quick Reference

ACCOUNT MANAGER I OWN	A/M + OPS MANAGER WE OWN TOGETHER	OWNER I ELEVATE
<ul style="list-style-type: none"> • Handle at my level per SOP • Escalate with recommendation • Document novel situations • Use emergency bypass for safety • Never escalate a bare question 	<ul style="list-style-type: none"> • Receive and resolve per SOP • Add recommendation if re-escalating • Track escalation patterns • Coach under-escalation and over-escalation • Flag novel situations for SOP development 	<ul style="list-style-type: none"> • Resolve Owner-level escalations • Receive emergency bypasses • Decide on novel situation SOPs • Calibrate escalation criteria monthly • Track escalation frequency as KPI #1

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Escalation frequency to owner (all types)	----- /day	< 8 per day	KPI Dashboard (#1)	Wednesday
Escalations with recommendation	----- %	> 90%	O/M tracking	Wednesday
Novel situations identified	----- /mo	Track only	Monday Standup log	Monthly
Emergency escalations	----- /mo	Track only (never discourage)	Incident tracker	Monthly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By



SOP-034 | Monthly Decision Review

Purpose

The Monthly Decision Review is where the framework evolves. Without it, your SOPs become static documents that drift further from reality every month. This is the 60-minute session where you celebrate decisions made well, learn from decisions that missed, adjust criteria that no longer fit, and expand authority where it has been earned. Skip this meeting and the system decays. Run it consistently and your company gets smarter every month.

Primary Roles: Owner, Ops Manager, Account Manager

Related Templates: All Templates (cross-cutting)

THE REVIEW PRINCIPLE:
This meeting is not about catching mistakes. It is about calibrating the system. When a decision goes wrong, the question is not 'who messed up?' The question is, 'Did the criteria give them what they needed to make the right call?' If not, fix the criteria. Do not blame the person.

Decision Rights Matrix

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Criteria adjustment (any SOP)	Owner + Ops Mgr	Based on 30-day data. Threshold no longer fits current revenue, staffing, or market conditions.	N/A - scheduled review.	All affected roles informed within 1 week. Role Cards updated if applicable.
Authority expansion for any role	Owner	90+ days of consistent judgment. Decision audit confirms readiness. O/M recommendation.	N/A - scheduled review.	Handoff conversation within 1 week. Role Card updated.
New SOP adoption	Owner	Novel situation documented. Likely to recur. Criteria drafted and reviewed.	N/A - scheduled review.	New SOP distributed to all affected roles within 2 weeks.

Step-by-Step Procedure

PHASE 1: PREPARATION (WEEK BEFORE REVIEW)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
1	Ops Manager	Prepare review packet: - 30-day KPI trends (all dashboard metrics) - Escalation pattern analysis - 2-3 decisions to spotlight (wins) - 1 decision to learn from (miss) - Any criteria adjustment proposals - Authority expansion recommendations	Data not available for review. O/M must have dashboard current and complete before scheduling the review.	Review scheduled first week of each month. Calendar hold set 12 months in advance.
2	Account Manager	Prepare client-facing review data: - Client retention rate (rolling 12-month) - Complaint trends and resolution times - At-risk account status update - Credit total and patterns - Renewal pipeline status	Significant client retention drop or complaint spike. Flag to Owner before the review meeting.	A/M data integrated into review packet 3 days before meeting.

PHASE 2: THE REVIEW MEETING (60 MINUTES)

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
3	Owner (leads)	DASHBOARD REVIEW (15 min): Walk through 30-day KPI trends. Compare to Day 90 targets. What improved? What did not? Quantify improvement in hours and dollars where possible.	Multiple metrics trending wrong. May need to extend this segment or schedule a separate deep dive.	This is a monthly meeting. Do not skip. Do not reschedule without a new date.
4	Owner (leads)	SPOTLIGHT WINS (10 min): Name 2-3 decisions that went well. Who made them? What criteria did they use? Public recognition builds confidence and reinforces the system.	No wins to spotlight. This itself is a signal that the framework needs attention.	Wins shared with broader team at next Monday Standup.

PHASE 2 CONTINUED: REVIEW MEETING

Step	Who Owns This	What You Do	Escalation Trigger	Cadence Connection
5	Owner (leads)	SPOTLIGHT LESSON (10 min): One decision that did not go well. Was it a criteria gap, a confidence gap, or a process failure? No blame. Just diagnosis. What would fix it?	Pattern of same lesson type recurring month after month. Structural issue needs deeper intervention.	Lesson informs criteria adjustments in next segment.
6	Owner + Ops Mgr	CRITERIA ADJUSTMENTS (15 min): Review any SOP criteria that no longer fit. What needs to change? What should the new threshold be? Document in the Criteria Evolution Log of affected SOP. Update Role Cards if authority changes.	Major criteria change affects multiple SOPs or requires retraining. Schedule implementation plan.	Criteria changes communicated within 1 week. Role Cards updated. Handoff conversation if needed.
7	Owner	ESCALATION PATTERNS + CLARITY (10 min): Are decisions escalating that should not be? Are decisions NOT escalating that should? Clarity check: "1-10, how clear are you on what you own?" Below 7 = action before next month.	Clarity score below 7 for any role. Schedule re-handoff conversation within the week.	Escalation patterns feed next month review cycle.

KPI Targets

Metrics	Baseline	Day 90 Target	Where It Lives	Cadence
Monthly Review completed on schedule	----- %	100% (no skips)	Calendar / meeting log	Monthly
Criteria adjustments made per review	-----	Track only	Criteria Evolution Logs	Monthly
Authority expansions granted per quarter	-----	Track only	Quarterly Review	Quarterly
Team clarity score (1-10 average)	----- /10	> 8 average	Review meeting notes	Monthly
Owner decision hours per week (trending)	----- hrs	Trending down toward < 8 hrs/wk	Owner time log	Monthly

Criteria Evolution Log

Date	What Changed	Old Criteria	New Criteria	Approved By

THE LEADERSHIP INFRASTRUCTURE PRINCIPLE:

These five SOPs are the operating system for the operating system. Hiring puts the right people in the chairs. Coaching develops their judgment. The dashboard measures whether the system is working. The escalation protocol keeps decisions flowing correctly. And the Monthly Review keeps the whole framework evolving. Run these consistently, and every other SOP in the playbook gets stronger every month. Skip them, and the binder collects dust. You know how that story ends.