Tool 09: The system calendar

Purpose

Keep each fix from sliding back. For "no system" and leak 8 (Feast or famine). Chapters 16, 18 and 19.

Inputs

- Your current fix and any tools you've completed; add tasks as you finish more.
- A calendar (paper or phone) and one named person for each task. Several locations: one calendar per location, or a location column.
- Your trade's busy and slow months for your city (chapter 18 and Appendix B).

Steps

Part A: The system calendar (chapter 19)

Every week (30 minutes)

1. Review the missed-call log and check that every missed call about a potential job was returned within your stated callback time (chapter 9).
2. Check that every job finished this week got the review request at the agreed milestone, sent by the person responsible, the same way every time. Catch up on any that were missed. No incentives, and no asking only the happy customers. Count requests sent and reviews received, by platform.
3. Reply to new reviews, good and bad.
4. Add 3 to 5 job photos with job type and town.
5. Follow up every open quote older than a few days.

Every month (one hour)

6. Fill in tool 08, the monthly numbers.
7. Check your Google Business Profile: hours, services, photos, any edits Google or others made. This is an audit; one named person handles Google's edit notifications as they arrive, within Google's 4 days (chapter 12).
8. Run the after-hours self-call once (tool 02, part C), and test every contact route on the route log (tool 02, part B). Monthly is our practical judgment, not a tested interval. Retest any route after a change to the site, phones or staff.
9. Check your newest review date and 30-day count against your own last month.
10. Booked jobs and cost per booked job by source (chapters 3 and 17).
11. Check the past-customer calendar is on track: thank-yous, check-ins, reminders (part B).
12. Map position: your three main searches from the same spots as last month, searched in person (chapter 12). If you use a grid tool instead, ask three things of it: does it search from the points it shows, on the same day each month? Does it use your searches as homeowners type them? Does it show the three names above you at each point, not only a score?

Every quarter

13. Re-check the trust-source match: site, Google profile, BBB, state license (tool 03, part B).
14. Review lead sources: keep, cut or set a stop date on anything rented (chapter 17).
15. Export the customer list to a file you own (chapters 2 and 16).
16. Re-run the Leak Check (tool 01). Note which leak is now first.

Twice a year

17. Search your business name logged out. Note page one (tool 03, part A; chapter 7).
18. The AI check with two AI tools, same prompt, same city (tool 03, part D). Record who is named and which sources are linked.
19. Re-run the ownership inventory for anything that changed (tool 04).
20. Re-check the directories and lists in your service-and-town searches, and your place on each (chapter 14).

Before each season (from your trade's pattern)

21. Before the busy season: plan how calls get caught when you can't answer, raise the bar on which jobs you take, line up capacity (part C).
22. Before the slow season: past-customer reminders, maintenance-plan renewals, any rented channel switched on with a stop date (part C).

Part B: The past-customer calendar (chapter 16)

Put it on one page. The office runs it. The owner checks it once a month.

When	What	Who
Day of the job	Leave two cards.	Tech or crew lead
At the agreed milestone	At the agreed milestone, the person responsible sends the request, the same way every time. No pressure, and no telling them what to say (chapter 5).	Person responsible (tech, crew or project lead)
Within 1 day	Thank-you text or email, with warranty details	Office
2 to 4 weeks	"How's everything working?" check-in	Office
Each season	One useful seasonal reminder to the whole list	Office
Before the slow season	Plan renewals, tune-up reminders, inspection offers (chapter 18)	Office
Before warranty ends	Reminder and offer of an inspection	Office
Every quarter	Export the customer list to a file you own (chapter 2)	Owner
Every month	Count repeat and referral calls in the call log (chapter 3)	Owner

Part C: The slow-season calendar (chapter 18)

Fill this in once a year from your own call log, then check it against your trade's pattern in chapter 18.

When	What	Who
6 weeks before busy season	Test answering and after-hours coverage; fix Google hours	Owner and office
4 weeks before busy season	Line up subs and referral partners; set the job filter	Owner
Busy season	Pause rented leads when full (owner); protect plan customers (office)	Owner and office
End of busy season	Set money aside; note what you missed	Owner
6 weeks before slow season	Plan renewals, reminders, inspection offers to past customers	Office
4 weeks before slow season	Offer dates for planned work; decide on rented sources and stop dates	Owner
Slow season	Pages, listings, photos, training	Owner and office

How to read the result

- When an item is missed, deal with the customer first. Then find the cause: time, access, authority, information or capacity. Fix the process, reassign the task, or defer it to a written date. A solo shop defers with a written date too (chapter 19).
- The intervals are a **rule of thumb, untested**. They follow how fast each thing changes: calls every day, reviews every week, listings every month, name searches and AI answers more slowly.

Limits

- The calendar keeps work steady. It doesn't create demand in a month when nobody searches for your trade.
- Twice-yearly AI checks are snapshots; compare patterns, not single answers.
- Seasonal patterns come from search volumes, not from booked jobs.

Next action

- Put items 1 to 22, and the rows in parts B and C, into the calendar with a name next to each. Then return to your current leak's chapter.

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