The Head-Start Checklist

20 things to set up that put you ahead of other new contractors.

Most new contractors start with a registration, a truck and a phone. The ones who grow faster get these 20 things done early.

How to use it: check off each item as you get it done. Stuck on one? Let me know. The consultation is FREE!

1 Get your paperwork lender-ready

You will be losing to competitors that offer financing. It is hard to obtain financing partners, but not impossible.

- [ ] Make sure your registration, bond and insurance all show your exact business name.
- [ ] Get a certificate of insurance you can send the same day.
- [ ] Get your EIN and keep a signed W-9 ready.

> If you want to offer financing day ONE, **scroll to the bottom.**

2 Set up banking and payments

Choose the right bank, ideally without monthly fees.

- [ ] Set up card and bank (ACH) payments.
- [ ] Separate business from personal accounts.
- [ ] Put a deposit and payment schedule in writing for every job, and bill with invoices or payment links.

> I will help you find a perfect bank for your business for free. **Scroll to the bottom.**

3 Look established online

Homeowners prefer businesses that have a well-designed website. Stand out from the crowd!

- [ ] Build a website with your services, service area and registration number.
- [ ] Add an estimate request form to your website.
- [ ] Get a business email on your own domain (you@yourcompany.com).
- [ ] Verify your Google Business Profile and start collecting reviews.

> I will mock up your ideal website for free, and explain how to make it into reality. **Scroll to the bottom.**

4 Keep your ads legal

Washington can fine contractors for both of these.

- [ ] Put your registration number on your website, cards, flyers and ads. Washington requires it on advertising that shows your name or address.
- [ ] Take “bonded and insured” off your ads. Washington doesn’t allow that claim based on the bond and insurance you need to register.

5 Line up your supply

Don’t pay more than you need to for supplies.

- [ ] Open an account with a building-supply distributor.
- [ ] Work out your cost per square, window or foot, so every quote has your margin built in.

> Ask about the FREE margin calculator.

6 Get certified by manufacturers

Certified installers are preferred by homeowners! It doesn't cost to get certified.

- [ ] Apply to a manufacturer's contractor program for the products you sell.
- [ ] Get enhanced manufacturer warranties.
- [ ] Showcase your certifications on your website.

> I will review your business for FREE, recommend distribution and the right certifications, and explain when and how to negotiate your supply prices! **Scroll to the bottom.**

7 Set up your sales system

A good sales system is the biggest difference between a successful business and a failing one!

- [ ] Write down your sales process, from first call to signed contract.
- [ ] Put every lead and follow-up in a CRM.
- [ ] Send estimates and contracts for e-signature.

> People who say they don't have a sales system don't realize that they do, it's just not good. Free review included. **Scroll to the bottom.**

FREE CONSULTATION

Stuck on any of these?

Book a free 20-minute consultation and we'll explain how to get every item on this list.

On the call, we'll explain

- [x] How to get approved for financing as a new company
- [x] How to open a supply account and get into manufacturer programs
- [x] How to set up your website, email and Google profile the right way
- [x] Which items to do first, so you can start making more money sooner!

BOOK YOUR FREE CONSULTATION

Text FREE to 253/257-8653

Every week you can't offer financing, the bigger jobs go to someone who can. Tell us what you've checked off, and we'll explain how to get the rest.

Rather have it done for you? RUFKO can set up any item on this list.

RUFKO isn't a lender, broker or law firm. Financing programs set their own requirements, and they change. Washington's contractor advertising rules are in RCW 18.27.100.