

The Learning Plan

# Case Study



Building a business around the business: brand, operations, and systems for a trades company starting from zero

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| <b>INDUSTRY</b><br>Trades/Home Services | <b>DURATION</b><br>Multi-year | <b>ENGAGEMENT</b><br>Embedded Fractional |
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## The Situation

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A pool and landscaping company had excellent tradespeople and strong in-field delivery — but virtually nothing operating on the business side. No website. No brand credibility. No documented processes. No CRM. No financial visibility.

The founder was carrying the entire commercial and administrative operation without systems, and the field teams were working without consistent communication or information.

The gap wasn't in the craft. It was in everything else.



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## The Work

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### BRAND AND MARKET PRESENCE

- Built the company website from scratch
- Established brand credibility with visual identity, tone, and consistent external presence
- Co-created the full content library with sales and turned field expertise into marketable material

### OPERATIONS, PROCESS, AND FINANCIAL INFRASTRUCTURE

- Developed and documented administrative, permit, and office processes — converting informal practices into repeatable systems
- Implemented a CRM with forecasting capability, giving the business its first real pipeline visibility
- Brought in financial advisors to address cashflow management and expense tracking = the company's first structured financial oversight
- Worked with the founder to map the full project delivery process end-to-end, standardize a project schedule, and implement it consistently

### FIELD TEAM COMMUNICATION AND ALIGNMENT

The field teams were operating in an information vacuum — no standardized communication, no company-level visibility, no shared tools. Built the infrastructure to connect office and field:

- Established standardized communication and team chats
- Organized regular team meetings with structured company information sharing
- Implemented field-ready project communication, ensuring crews had what they needed before arriving on site



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## The Outcome

“ We consider them a vital part of our team. ”

A company with exceptional trade skills but no business infrastructure was transformed into one with a credible market presence, documented operations, financial visibility, and a field team that was informed and connected.

The founder went from carrying everything alone to running a business with systems that didn't depend on his memory.

Disciplines: Brand & Marketing | Website Build | Content Strategy | Operations Design | CRM Implementation | Financial Advisory | Process Documentation | Team Communication

