

# The Business Playbook

How to Build a Great Company  
from the Ground Up

**Crafted by**

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**Overview**

This playbook draws from Eric and Alex's rich experience successfully building multiple organizations and companies over the past 20 years. It's been developed to provide a robust framework for business owners aiming to scale their ventures and create companies that are built to last.



## Pursue a Mission and Vision

Align your business around a core passion and create a vision for the future.

- Identify what you excel at and develop your mission / vision around it.
- Lead by example and work harder than everyone else.
- Be passionate and love the work you do or you'll be tempted to quit.
- Stay focused on your core competencies; you can't boil the ocean.
- Continually champion your mission and vision to inspire those around you.



## Build a Great Team

Assemble a team of the absolute best people you can find.

- Be a great talent scout and recruit talented people in every role.
- Emphasize hiring A+ players who take pride in their work.
- Look for passion, strong work ethic, and a desire to learn and grow.
- Clearly define roles and responsibilities for each team member.
- Take time to find the right people - don't just settle to fill positions.



## Focus on Culture

Strive to make your company a best place to work.

- Develop and live by your company's core values.
- Make sure people feel valued and heard.
- Figure out what motivates your team and do more of it.
- Host team events and celebrate achievements.
- Feed your team food, and they will love you for it.
- Remove individuals who negatively impact the culture.



## Master Sales and Marketing

Build a great online presence and make sure you always answer the call.

- Clearly identify and understand your target customers.
- Establish a strong website and social media presence.
- Track your marketing efforts to know what's working and what's not.
- Actively manage your sales pipeline and document all interactions.
- Develop a repeatable sales process that works for your business.
- Leverage customer testimonials and reviews to build your credibility.



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## Deliver Exceptional Customer Experiences

Create customers for life by going above and beyond to exceed expectations.

- Be responsive, easy to work with, and professional at all times.
- Ensure clear, transparent communication throughout the entire process.
- Do right by your customers and treat them as you would want to be treated.
- Deliver high quality work worthy of referrals and 5-star reviews.
- Under promise and over deliver.



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## Implement Efficient Processes

Develop repeatable processes to streamline and scale your business.

- Be process oriented and find ways to do more with less.
- Streamline existing processes before throwing bodies at a problem.
- Make processes easy to follow and leverage automations where possible.
- Develop standard operating procedures for your most common tasks.
- Document your processes and train your team to ensure adoption.
- Continually review processes to identify areas for improvement.



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## Embrace Technology

Leverage the best technologies and create a connected ecosystem.

- Understand your needs and find the best solutions to address them.
- Empower your team with the tools and technologies needed for success.
- Simplify your tech stack for ease of use, management, and to lower costs.
- Setup integrations to eliminate duplicate efforts, save time, and reduce errors.
- Tap into support resources and get training for yourself and your team.



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## Know Your Numbers

Make smarter, data-driven decisions to build a better business and increase profits.

- Establish an annual budget with projected monthly revenues and expenses.
- Understand your costs to accurately price jobs and achieve your target profits.
- Use job costing to know how you're performing and course correct before it's too late.
- Track revenue, gross profit, net income, and cash flow to monitor financial health.
- Monitor Key Performance Indicators relative to your goals and industry benchmarks.
- Conduct regular financial reviews to improve planning and resource allocation.



## Build Your Partner Team

You can't do it all yourself; form partnerships to expand your capabilities.

- Accounting
- Banking / Finance
- Coaches
- HR / Staffing
- Insurance
- Legal
- Marketing
- Software / Technology
- Subcontractors
- Suppliers



## Continuously Improve

Never stop learning and always look for new ways to push your business forward.

- Actively solicit feedback and encourage the sharing of ideas.
- Challenge the status quo and never get complacent.
- Implement meetings, check-ins, and reviews to improve communication.
- Pursue education and development opportunities for you and your team.
- Build a network of peers to ask questions and share best practices.
- Champion a culture where the best idea always wins.

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## Now is the Time to Take Action

Adapt these strategies to fit your unique business and use this playbook as a guide to build a **scalable**, **resilient**, and **successful** enterprise.



**Eric Fortenberry**  
Founder & CEO, JobTread

Eric Fortenberry is a passionate entrepreneur who founded JobTread after serving as CEO for a General Contracting company where he built the first version of the software to remedy their broken processes.

JobTread has grown to help thousands of construction companies sell and manage billions of dollars in construction jobs. The company has received numerous awards including the #1 Construction Management Software and the #1 Construction Estimating Software by both Software Advice and GetApp.