

Cleaning Business Scaling & Franchising — Workbook

This workbook turns the course into action for your cleaning company. You will score your readiness to scale, model your route economics, build out a management layer, and pressure-test whether branches or franchising is the right path. Work through one section per module, then complete the action plan and fill in the included templates with your real numbers.

Breaking the Owner-Operator Ceiling

Diagnose where your company is stuck and rebuild the structure so it no longer depends on you.

Exercise: Map Your Five Owner Jobs

List every role you personally perform in the business right now. Then mark which of the five owner jobs each one belongs to and estimate the hours per week you spend on it.

- Which of the five owner jobs (cleaning, quality control, dispatch, customer communication, sales) consumes the most of your week?

- Which job, if delegated first, would free your highest-value hour?

- What is the single task you are most afraid to hand off, and why?

- Which growth wall are you currently stuck behind: Delivery, Coordination, or Replication?

Worksheet: Future-State Accountability Chart

Define the seats your company needs at its next stage, not the people you have today. For each seat, name the three to five outcomes it owns and who currently sits in it.

Seat name (e.g. Operations Manager)

Three to five outcomes this seat owns

Person currently in the seat (may be you)

Target hire-by date

First seat to fill next

Checklist: Scaling Readiness Pre-Flight

- Core cleaning procedures are documented and trainable, not only in my head
- Gross margin per job is at least 30 to 40 percent after labor and supplies
- Net margin after overhead is at least 10 to 20 percent
- I have at least two to three months of operating expenses in reserve
- No single client is more than 15 to 20 percent of revenue
- Recurring revenue is above 70 percent of total revenue

[] The business can run at least one week without me touching dispatch or quality

Systemizing Routes and Field Operations

Engineer crew profitability through density, software, and quality systems that survive turnover.

Worksheet: Route Density and Drive-Time Audit

Pick one crew and track a full week. Record jobs completed, billable cleaning hours, and total drive time per day. Compute the drive-time ratio (drive time divided by billable time) and identify your worst day.

Crew name and home territory zip codes

Jobs completed per day

Billable cleaning hours per day

Total drive time per day

Drive-time ratio (drive time divided by billable time)

Two jobs that fall outside the cluster and should be surcharged or declined

Exercise: Field-Service Software Selection

Decide which platform fits your segment. Compare two candidates against the features that actually move the needle, then pick one to trial.

- Is your business primarily residential maid service or commercial janitorial, and which platforms fit that segment?
- Which two platforms (e.g. Jobber, Housecall Pro, Swept, ZenMaid, Aspire) will you compare?
- Which three features matter most to you: geofenced clock-in, recurring scheduling, in-app checklists, auto-charged payments, or automated reminders?
- What is the current gap between when you complete a job and when you get paid, and how would auto-charging cards on file change it?

Checklist: SOP and Quality System Build

- [] Written checklist created for each room type: kitchen, bathroom, bedroom, common area, specialty
- [] Short demonstration video recorded for high-skill tasks like streak-free glass and grout
- [] Standard supply caddy layout documented so every crew is stocked identically
- [] Closing checklist confirmed in the app before crews leave each job
- [] Supervisor inspection scorecard created with a clear pass threshold of about 90 percent
- [] Repeated low scores tied to a defined retraining process

Building the Management Layer and People Engine

Stand up the hiring funnel, supervision tier, pay design, and KPIs that let crews run without you.

Worksheet: Always-On Hiring Funnel Plan

Design a recruiting pipeline you run continuously, even when fully staffed. Define each stage and the metric you will track for it.

Sourcing channels (Indeed, Facebook groups, referral bonus, adjacent jobs)

Screening method and key disqualifiers (transportation, availability, reliability)

Working interview: paid trial shift length and which team lead runs it

First-week onboarding plan using SOPs

Referral bonus amount and the tenure required to pay it

Target number of candidates kept in the pipeline at all times

Exercise: Design Your Management Layer

Plan the supervision tier you need at your next crew count. Use a span of control of roughly one supervisor per four to six crews.

- How many crews will you run at your next stage, and how many supervisors does that require?
 - Who on your team is the strongest internal candidate for first supervisor, and what management training do they need?
 - How will you reduce that supervisor's hands-on cleaning load so they have time to inspect and lead?
 - What advancement path (cleaner to team lead to supervisor) will you advertise to your crews?
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Checklist: Compensation and KPI Dashboard Setup

- Chosen a pay structure: hourly base plus quality bonus, per-job, or a hybrid
- Team-lead premium defined for crew leaders
- Retention bonuses set at 90 days, 6 months, and 1 year
- Revenue per crew-hour calculated and benchmarked
- Client churn or retention rate tracked monthly
- Inspection score, rework rate, and drive-time ratio added to a weekly dashboard
- A short weekly review meeting scheduled with the management layer

Expansion Models: Branches, Licensing, and Franchising

Decide how to replicate and prepare the economics and documents an expansion path requires.

Exercise: Choose Your Expansion Path

Weigh company-owned branches, licensing, and franchising against your capital, control needs, and how systematized you already are. Be honest about whether your model runs without you yet.

- Has your home market run profitably for 90 days without you touching daily dispatch and quality?

- How much of your own capital can you put toward expansion, and does that favor branches or franchising?

- How much ongoing control do you need over each location's quality and brand?

- If you are considering licensing, have you confirmed with franchise counsel that it would not legally qualify as an unregistered franchise?

Worksheet: Franchisor Money Model

Model the economics of becoming a franchisor. Use realistic cleaning benchmarks for fees and royalties, then project your recurring royalty base at different unit counts.

Initial franchise fee (commonly 15,000 to 50,000 dollars)

Ongoing royalty percentage (often 5 to 10 percent)

Marketing fund percentage (often 1 to 3 percent)

Average annual revenue per unit

Annual royalty per unit (unit revenue times royalty percent)

Projected royalty base at 5, 10, and 20 units

Estimated upfront cost to build the franchise system (legal, training, support)

Checklist: Pre-Franchise Readiness

- Operated at least one unit profitably that I do not personally run day to day
- Operations manual and training academy built from existing SOPs
- Unit-level economics prove a typical owner-operator can earn a good living
- Franchise attorney engaged to draft the FDD and franchise agreement
- Decided whether to include an Item 19 Financial Performance Representation
- State registration requirements identified for target expansion states
- Franchisee support infrastructure (training, field support, technology) planned

Your Action Plan

1. Score your business on the seven readiness dimensions and fix any dimension below 3 before adding crews or locations
2. Delegate the cleaning route first, then quality control and dispatch, in that order, to free your highest-value hours
3. Run a one-week route density audit on your busiest crew and tighten the drive-time ratio toward 15 percent or below
4. Select and trial one field-service platform matched to your segment, prioritizing geofenced clock-in or auto-charged payments
5. Document your top 20 recurring tasks as room-level checklists with short videos and launch a weekly inspection scorecard
6. Stand up an always-on hiring funnel with a paid working-interview step and structured first-week onboarding
7. Promote or hire your first field supervisor and reduce their cleaning load to give them real time to manage
8. Build a six-metric weekly dashboard and hold a short weekly review with your management layer
9. Prove a second location run by a manager before committing to franchising, and build your operations manual from your SOPs
10. Engage a franchise attorney to assess the FDD path only once your model demonstrably runs without you

