



FLOORING CONTRACTOR BUSINESS KIT

The Flooring **Contractor** Operations Playbook

The system a flooring company runs on, from the first phone call to the review request: lead handling, estimate visits, estimates that don't leak money, scheduling, job paperwork and the walkthrough.

10 chapters

Price book: 113 items

Estimating workbook

14 editable job forms



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What's inside

Use it as a whole system or take one chapter at a time. The Estimating Workbook and the Job Forms Pack in this kit put each chapter to work.

01 The system at a glance

The customer journey, the pipeline stages, and which document does what

02 Leads: fast, organized, qualified

What to capture, how fast to answer, the qualification questions and next actions

03 The estimate visit

Arrive prepared, inspect and educate, measure, and what to check on site

04 Estimates that don't leak money

The price book, line items, minimums, adjustments, terms and the final check

05 Closing and follow-up

Closing on site, deposits and the follow-up cadence that wins quiet leads back

06 From sale to start

Materials first, scheduling, the pre-start call and the field sheet

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Kickoff, daily updates, change orders and protecting the home

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Short messages for every step, from first reply to review request

About this guide

This guide was written by Vision Flooring LLC, a flooring company in Everett, Washington, led by owner Alex Babko. We have 20+ years of experience and 3,800+ clients behind us. Hardwood refinishing and installation, LVP, laminate, baseboards and floor repair after water damage are our everyday work, and this guide is what we explain to homeowners at their kitchen tables, written down so you can keep it.

This playbook is how we run our own flooring company in Everett, Washington, written down so you can use it in yours. The kit also includes **our own price book**: 113 line items with the descriptions and prices we use, as a starting point. Your market, crew and costs are different, so set your own prices before you use them; the Estimating Workbook runs on whatever you put in. Where it touches contracts, required notices, deposits or employment, it points you to the questions to ask; rules differ by state, so check yours with your licensing agency, attorney or accountant.



General information, not a substitute for your instructions

Every home, floor and product is different. Your flooring and product manufacturers' instructions, your local building codes and your insurance policy always come first; where they differ from this guide, follow them. Work safely and call a licensed professional for anything you are not sure about.

How to use it

- Read it once start to finish (about an hour), then keep it handy. Every chapter has **"The short version"**: its key points in a few lines.
- Boxes marked **Pacific Northwest note** matter most in damp climates like ours; they are good practice anywhere.
- The worksheets at the back are made to print on letter paper. The spreadsheet that comes with this guide does the math for you.

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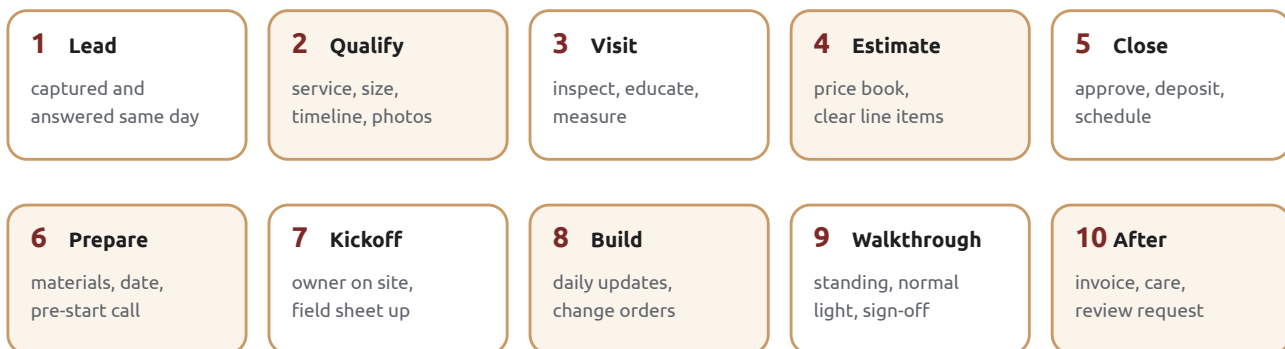
The system at a glance

Most flooring companies don't lose money on installation day. They lose it on unanswered leads, estimates that leave things out, jobs that start before the house is ready, and walkthroughs that end in an argument. A simple system fixes all four.

THE SHORT VERSION

- Every lead moves through the same stages until it is won, lost or waiting for a reason.
- Each stage has one document or tool that keeps it from slipping.
- The owner's time goes where it matters most: the estimate visit, the kickoff and the walkthrough.

The customer journey



Ten steps every job goes through. Each chapter of this playbook covers one or two of them.

The pipeline stages

Whatever software you use (a contractor CRM, a spreadsheet or the Pipeline tab in the workbook), give every lead exactly one stage, and move it the day something changes.

STAGE	MEANS	YOUR NEXT MOVE
Received	A new inquiry has arrived; nobody has qualified it yet.	Answer it the same business day (Chapter 2).
Qualifying	You are gathering information: service, size, timeline, photos.	Ask the qualification questions.

STAGE	MEANS	YOUR NEXT MOVE
Qualified	A real opportunity, ready for a visit or an estimate.	Book the visit or prepare the estimate.
Quoted	The estimate has been sent; no decision yet.	Follow the follow-up cadence (Chapter 5).
Awarded	The customer approved the estimate.	Deposit, materials, schedule (Chapter 6).
Pending	The customer has a real reason they can't decide yet.	Agree on a follow-up date and set a reminder.
Lost	The customer said no, or went silent after the full follow-up.	Close it and note why, so you learn.

What each document does

STAGE	TOOL IN THIS KIT	PREVENTS
Lead and qualifying	Lead intake sheet; Pipeline tab	Forgotten leads and wasted visits
Estimate visit	Site visit checklist; moisture test log	Missed conditions that become arguments later
Estimate	Price book, takeoff and estimate tabs	Line items left off; jobs priced below cost
Sale to start	Acclimation record; pre-start walkthrough; field sheet	Crews arriving to houses that aren't ready
On the job	Daily job log; change order	Unpaid extra work; misunderstandings
Walkthrough	Completion sign-off; floor record; care handouts	Disputes over finished work; warranty confusion
After	Job costing tab; warranty call record	Not knowing which jobs made money



CHAPTER

03

The estimate visit

The visit is where trust is built and most jobs are won. The goal is not to sell a floor; it is to help the customer make a good decision, and to see everything that will affect the price before you write it.

THE SHORT VERSION

- Arrive prepared: cards with your photo, measuring tools, samples.
- Inspect and educate before you measure; explain what is possible and what is not.
- Check the conditions that change the price: moisture, flatness, transitions, doors, appliances, stairs, access.
- Prepare the estimate on site when you can.

Arrive prepared

- | | |
|--|--|
| ☐ Business cards with your photo on them (people remember a face) | ☐ Stain and color samples, product samples |
| ☐ Laser measure and tape measure | ☐ Phone or tablet with your estimating tool and photos of past jobs |
| ☐ Moisture meter (wood and concrete) | ☐ The site visit checklist from the forms pack |
| ☐ A long straightedge or level for flatness | |

The visit, step by step

1 Greet and introduce

Smile, introduce yourself, hand over your card. Ask for a quick tour of the rooms involved.

2 Understand the goal

What are they trying to achieve: a fresh look, selling the house, kids and pets, a repair after a leak? The goal decides the right recommendation.

3 Inspect and educate

Look closely, ask questions, and explain what you see: what is possible and what is not. Honest limits (“these pet stains won’t sand out; those boards get replaced”) build more trust than promises.

4 Help them decide

Lay out the options with their pros and cons, without pushing the most expensive one. Show examples of past work on your phone.

5 Measure

Every room, closet and transition, the stairs separately. Note everything on the checklist (next page).

6 Prepare the estimate

Build it on site when you can, from your price book; or tell them when to expect it, then send it the same or next day.

What to check on site

CHECK	WHY IT CHANGES THE PRICE OR PLAN
Existing floor and layers	Removal time and disposal; possible asbestos in old vinyl and adhesive (test before disturbing).
Subfloor type and condition	Plywood, OSB or concrete; soft spots; past water damage.
Moisture	Wood subfloor and flooring readings; concrete tests the product requires. Log them.
Flatness	Floating and thin floors need it; leveling is real work and material.
Transitions and heights	Every doorway, slider, hearth and stair edge; height differences to other floors.
Doors and trim	Door clearance after the new floor; reuse or replace baseboards.
Appliances and plumbing	Moving, disconnecting and reconnecting; old supply lines that may fail when moved.
Furniture	Who moves it, and how much.

CHECK	WHY IT CHANGES THE PRICE OR PLAN
Stairs	Treads, risers, nosings, landings.
Access and setup	Parking, distance, stairs to carry up, where you can cut.
Dust and occupancy	What must be masked; whether the family can stay; finish fumes.



Old floors and paint

In older homes, vinyl tiles, sheet vinyl and black adhesive may contain asbestos, and painted trim may contain lead. Know your state's rules for testing and handling before your crew disturbs them.

END OF THE FREE SAMPLE

Flooring Contractor Operations Playbook

You just read a few pages. The complete version has everything below, with every worksheet and the spreadsheet.

- ✓ Flooring Price Book: our own 113 line items (setup and minimum charge, removal, subfloor prep, hardwood, stairs, refinishing, repairs, LVP, laminate, carpet, trim, appliances, materials and rentals) with descriptions, units and the prices we charge in Everett, Washington
- ✓ Import files for the price book: Contractor Foreman's cost item and cost code format, and a CSV for other estimating software
- ✓ Estimating Workbook: the price book filled in, room takeoff, estimate builder with minimum-job rule, deposit schedule and margin check
- ✓ Job costing sheet: estimate against actual, so you see which jobs really made money
- ✓ Job Forms Pack (editable): site visit checklist, moisture test log, acclimation record, pre-start walkthrough, change order, completion sign-off, floor record and more
- ✓ Operations Playbook: lead response, estimate visits, writing scope clearly, scheduling, crew checklists, final walkthrough, warranty calls and reviews
- ✓ Customer care handout templates for refinished hardwood, prefinished hardwood and LVP/laminate

Get the full guide →

visionflooringllc.com/flooring-contractor-business-kit · Instant download · Business kit: playbook + workbook + forms

Questions first? Text **425-218-4234**; a real person answers.