

SAMPLE WORK PREVIEW

Practical Tools Your Team Can Actually Use

A few examples of the checklists, trackers, and operating tools Groundwork can build around how your business actually runs.

Built to be used, not admired.

Simple enough for a real shift, job, service call, event, or follow-up list. Every final version is built around the client's actual team, workflow, and pain points.

SAMPLE 01 - TRAINING

New Hire First Shift Checklist

Use this when a new employee starts and you need the first shift to feel organized instead of improvised. This kind of checklist helps the trainer, the new hire, and the manager know what must be covered before the shift ends.

Best for	Restaurants, bars, food trucks, service businesses, field teams, sales teams, and owner-operated teams.
Purpose	Reduce first-day confusion and make training less dependent on whoever happens to be explaining things.
Owner pain solved	"I showed them once, but they still keep asking me the same questions."

Section	What Gets Checked	Done
Before They Arrive	Uniform, schedule, login/access, trainer assignment, and first-shift expectations are ready.	☐
First 30 Minutes	Tour the space, explain who to ask for help, review standards, safety basics, and immediate priorities.	☐
Shadowing Expectations	New hire observes key tasks, then repeats them with trainer support before working alone.	☐
Must Know Before Leaving	How to clock in/out, who they report to, core customer standards, sidework expectations, and next shift schedule.	☐
Manager Sign-Off	Manager confirms what was covered, what still needs practice, and what follow-up training is needed.	☐

Trainer note: If the new hire cannot explain the process back in their own words, the process is not trained yet. Do not assume silence means understanding.

SAMPLE 02 - SALES & LEADS

Lead Intake & Follow-Up System

Use this when leads are coming from texts, calls, referrals, social messages, or word of mouth and too many opportunities are getting lost. This works for salespeople, contractors, mobile mechanics, service businesses, food trucks, and owner-led teams.

Field	What It Captures
Lead Name	Who is the prospect or company?
Source	Where did they come from? Referral, Facebook, website, phone, event, LinkedIn, etc.
Need	What are they asking for? Keep it simple and specific.
Priority	Hot, Warm, Follow Later, Not Fit.
Next Follow-Up	The exact date you will reach back out. No vague "check in soon."
Status	New, Contacted, Responded, Call Scheduled, Proposal Sent, Won, Lost.
Next Action	The one thing you need to do next. Call, send quote, ask question, schedule, follow up.

Example Follow-Up Rhythm

Day	Action	Goal
Day 0	Respond, log the lead, ask one clear question.	Start the conversation.
Day 2	Follow up with a useful note, sample, or simple next step.	Stay helpful, not pushy.
Day 5	Ask if the timing is right or if you should follow up later.	Avoid chasing dead leads forever.

Owner pain solved: "I know I talked to somebody who wanted to buy, but I cannot remember where their message is."

SAMPLE 03 - DAILY OPERATIONS

Daily Readiness Checklist

Use this when the business opens, starts a shift, leaves for a job, sets up an event, or begins a service day. The goal is simple: make sure the operation is ready before customers, staff, or problems arrive.

Readiness Area	What To Confirm	Done
Space, Vehicle, or Station Setup	Work area is clean, safe, and ready. Tools, screens, stations, vehicle, or prep areas are where they should be.	☐
Equipment Check	Equipment is powered on, working, stocked, charged, and ready. Problems are reported before service starts.	☐
Inventory & Supplies	Critical supplies are checked. Missing items are logged before they become an emergency.	☐
Customer-Facing Readiness	Front-facing details are ready: signage, menus, product display, uniforms, phone, booking system, or customer area.	☐
Team Communication	Team knows the day's priorities, assignments, specials, jobs, appointments, or service expectations.	☐
Manager Review	Manager or owner confirms readiness and records any issue that needs follow-up.	☐

How this gets customized: In a restaurant, this may become opening sidework. For a mobile mechanic, it may become a service vehicle readiness checklist. For a salesperson, it may become a daily pipeline review. The structure changes to fit the business.

SAMPLE 04 - OPERATIONS GAP MAP

What Is Still Living in Your Head?

This is one of the first things Groundwork can help map. The point is not to judge the business. The point is to find the places where missing structure is costing time, money, consistency, or owner energy.

Process	Who Knows It?	What Happens If They Are Gone?	First Fix
Customer intake	Owner	Messages get missed, details are repeated, follow-up slips.	Intake form + tracker
New hire training	Best employee	Training changes depending on who explains it.	First-shift checklist
Daily setup	Manager	Shift starts late or with missing supplies.	Readiness checklist
Event prep	Owner/lead	Small misses become customer-facing problems.	Event SOP

What the client should feel:
"This is not a pretty document. This is a tool I can use Monday morning."

Need tools like this built for your business?
Start with the \$299 Groundwork Starter Package or request a 15-minute call.

These pages are sample formats. Final client documents are customized to the business, team, industry, workflow, and immediate pressure points.