

How we work with a trades owner for twelve months

A structured first year that moves a \$3M–\$15M trades business from owner-dependent to transferable. It can run on its own or inside an advisor's existing value-growth roadmap. **Every quarter ends with the same measurement, so progress is proved, not described.**

THE MEASUREMENT THAT RUNS THROUGH THE WHOLE YEAR

Twenty-five criteria across five dimensions: financial integrity, owner dependency, operational systems, revenue quality and concentration, and management bench. Each criterion is scored 0–4 against source documents, plus a separate Owner Dependency Index.

The rule: if a document can't be produced, that criterion can't score above 1 — however convincing the conversation. It's the same test a buyer's diligence team applies, run twelve months earlier.

Day 0	Day 90	Month 6	Month 12
Baseline score + findings	Re-score after the Build	Re-score: management layer	Re-score + readiness file

THE YEAR, PHASE BY PHASE

PHASE	FOCUS	WHAT THE OWNER'S TEAM BUILDS (WITH NCKTR BESIDE THEM)	PROOF AT THE END
Diagnostic Weeks 1–2	Baseline: what a buyer, lender or successor would find today	- Document request against all 25 criteria - Owner interview, including the absence question - Findings register with a 90-day priority sequence	Readiness score, Owner Dependency Index, 3–5 prioritized findings
Q1 • Build Weeks 3–14 weekly 90-min sessions	The top three findings, in dependency order	- Decision-authority matrix: what the owner stops approving - Written procedures for the five most frequent job types - Dispatch rules; monthly close cadence with the bookkeeper - A documented one-week owner absence (weeks 10–11)	Day-90 re-score, side by side with Day 0
Q2 • Bench Months 4–6 bi-weekly sessions	A management layer that decides without the owner	- Second-in-command role defined and delegated to - Weekly KPI scorecard, run by the team, not the owner - Written pay plans; key-person retention in place - Owner's quoting and pricing handed off	Month-6 re-score; scorecard history; two-week absence plan
Q3 • Revenue Months 7–9 bi-weekly sessions	Earnings a buyer will pay for: recurring, diversified, attributable	- Service-agreement program and renewal tracking - Revenue mix and customer-concentration plan - Lead-source attribution; review and reputation cadence - Largest customer relationships moved to the company	Mix and concentration trend; a documented two-week owner absence
Q4 • Proof Months 10–12 monthly sessions	Transferability, with evidence ready on request	- All 25 criteria producible on request - Three years of statements with a documented add-back schedule - The coaching cadence handed to the internal lead - Next-step decision: go to market, keep building, or hold	Month-12 re-score and the readiness file (below)

WHO DOES WHAT

NCKTR Runs the sessions, builds the frameworks and first drafts, reviews every draft within two business days, keeps the tracker, sends a written weekly status, and runs each re-score.	THE OWNER Attends every session, follows the delegation plan, and stops approving what has been handed off. The hardest job in the program.	INTERNAL LEAD A GM, operations manager or office manager with 5–8 hours a week. Writes and validates the procedures, and inherits the cadence in Q4.	THE ADVISOR Owns the client relationship. Receives each quarterly re-score (with the owner's consent) and decides with the owner when the business is ready to take to market.
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"We don't do it for you. A business that depends on us is no more sellable than one that depends on you. We build it with your people, so it stays when we leave."

HOW IT MAPS TO THE VALUE DRIVERS A BUYER PRICES

VALUE DRIVER	WHERE THE PROGRAM ADDRESSES IT
Quality of financials	Diagnostic baseline · Q1 monthly close · Q4 three-year statements and add-back schedule
Owner dependency	Owner Dependency Index every quarter · Q1 decision authority · Q2 quoting handoff · absence tests in Q1 and Q3
Documented processes	Q1 top-five job procedures and dispatch rules · Q4 everything producible on request
Management team	Q2 second-in-command, KPI scorecard, pay plans and retention
Revenue mix and client concentration	Q3 mix and concentration plan · service-agreement program
Lead generation and reputation	Q3 lead-source attribution, review and rating cadence

WHAT THE ADVISOR RECEIVES AT MONTH 12: THE READINESS FILE

- Four scorecards (Day 0, 90, month 6, month 12) on the same 25 criteria
- The full document set, producible on request
- Three years of statements with a documented add-back schedule
- Org chart, decision-authority matrix and pay plans
- KPI scorecard history, run by the team
- A record of the owner's absences and what happened

WORKING UNDER A PARTNER'S BRAND

- Runs inside your roadmap, your templates and your reporting
- The client relationship, and the transaction, stay yours
- NCKTR can be invisible to the client if you prefer
- Any phase can be taken on its own, e.g. just the Q1 Build for an owner your coaches can't fit

WHAT NCKTR DOES NOT DO

- No valuations, brokerage or transaction work
- No tax, legal or accounting services — we work with the owner's CPA and bookkeeper
- No done-for-you work: the owner's team builds it

BUILT BY AN OPERATOR

Darren Padgett, Jr. grew up in the trades, then built, ran and exited his own plumbing and heating company. NCKTR exists because the gap between a busy trades business and a transferable one is invisible from the owner's chair.

Targets are set per business at the Diagnostic. The program measures progress; it does not guarantee a valuation, a buyer or a transaction outcome.