

Leadership & Management Framework

For Trades and Service Business Owners

By Steven Rouget

ActionCOACH Business Coach

 **0412 351 755**

 **stevenrouget@actioncoach.com**

 **stevenrouget.com.au**

Introduction

The transition from tradesperson to business owner is one of the most challenging career shifts you'll ever make. Suddenly, you're not just responsible for delivering quality work – you're responsible for leading people, managing operations, and building a sustainable business.

Many trades business owners struggle with this transition because the skills that made them excellent technicians are different from the skills needed to lead and manage effectively. Technical expertise doesn't automatically translate to leadership ability.

This framework provides you with proven leadership and management strategies specifically designed for trades and service businesses. These aren't corporate theories – they're practical, field-tested approaches that work in the real world of job sites, tight deadlines, and hands-on work environments.

Section 1: Leadership Fundamentals for Trades Businesses

Understanding Leadership vs. Management

Leadership: Inspiring and guiding people toward a shared vision - [] **Vision Setting:** Painting a picture of where the business is going - [] **Motivation:** Inspiring people to give their best effort - [] **Culture Building:** Creating an environment where people want to work - [] **Change Management:** Helping people adapt to new situations - [] **Personal Development:** Growing people's capabilities and confidence

Management: Organizing and controlling resources to achieve specific results - [] **Planning:** Setting goals and determining how to achieve them - [] **Organizing:** Arranging resources and people for maximum efficiency - [] **Controlling:** Monitoring progress and making corrections - [] **Problem Solving:** Addressing issues that arise in daily operations - [] **Process Improvement:** Making systems and procedures more effective

Why You Need Both: Great trades businesses require both strong leadership and effective management. Leadership without management creates chaos. Management without leadership creates compliance but not commitment.

Core Leadership Principles

Principle 1: Lead by Example Your team watches everything you do. Your work ethic, attitude, and behavior set the standard for everyone else.

Daily Actions: - [] Arrive on time and prepared for each day - [] Maintain professional appearance and behavior - [] Demonstrate the quality standards you expect from others - [] Show respect for customers, suppliers, and team members - [] Take responsibility for mistakes and learn from them

Principle 2: Communicate with Clarity and Consistency Clear communication prevents most problems before they start.

Communication Best Practices: - [] **Be Specific:** Avoid vague instructions like "do it right" or "make it look good" - [] **Confirm Understanding:** Ask team members to repeat back important instructions - [] **Regular Check-ins:** Don't assume everything is

going well without checking - [] **Open Door Policy:** Make it safe for people to bring you problems or concerns - [] **Consistent Messages:** Ensure your words and actions align

Principle 3: Develop Your People Your business can only grow as fast as your people grow.

Development Strategies: - [] **Skills Training:** Invest in technical skill development - [] **Cross-Training:** Help people learn multiple aspects of the business - [] **Leadership Development:** Prepare high-potential employees for advancement - [] **Mentoring:** Pair experienced workers with newer team members - [] **External Education:** Support attendance at trade schools, seminars, or certifications

Section 2: Building and Managing Your Team

Hiring the Right People

Hiring Philosophy: Attitude First, Skills Second You can teach skills, but you can't teach attitude, work ethic, or integrity.

Key Attitudes to Look For: - [] **Reliability:** Shows up on time and follows through on commitments - [] **Coachability:** Willing to learn and accept feedback - [] **Problem-Solving Mindset:** Looks for solutions rather than just identifying problems - [] **Customer Focus:** Genuinely cares about customer satisfaction - [] **Team Orientation:** Works well with others and supports team goals

Interview Questions That Reveal Attitude: - [] "Tell me about a time you made a mistake. How did you handle it?" - [] "Describe a situation where you had to learn something completely new." - [] "What would you do if a customer complained about your work?" - [] "How do you handle it when you're running behind schedule?" - [] "What does quality work mean to you?"

Onboarding and Training Systems

First Week Onboarding Checklist: - [] **Company Overview:** History, values, mission, and culture - [] **Safety Training:** Comprehensive safety procedures and requirements - [] **Job Expectations:** Clear description of role and responsibilities - [] **Team**

Introductions: Meet all team members and understand their roles - [] **Systems Training:** How to use company tools, software, and procedures - [] **Mentorship Assignment:** Pair with experienced team member

90-Day Development Plan: - [] **Week 1-2:** Basic safety and company procedures - [] **Week 3-4:** Shadow experienced team members on various job types - [] **Week 5-8:** Begin taking on responsibilities with close supervision - [] **Week 9-12:** Increase independence while maintaining regular check-ins - [] **Day 90 Review:** Formal evaluation and goal setting for next 90 days

Performance Management

Setting Clear Expectations: - [] **Written Job Descriptions:** Specific responsibilities and standards - [] **Performance Standards:** Measurable criteria for success - [] **Goal Setting:** Individual and team objectives - [] **Regular Reviews:** Scheduled performance discussions - [] **Career Development Plans:** Path for advancement and growth

Performance Monitoring System: - [] **Daily Huddles:** Brief team meetings to discuss the day's priorities - [] **Weekly One-on-Ones:** Individual meetings with each team member - [] **Monthly Team Meetings:** Group discussions about performance and improvements - [] **Quarterly Reviews:** Formal performance evaluations - [] **Annual Planning:** Goal setting and career development discussions

Section 3: Creating Accountability Systems

Establishing Standards and Procedures

Quality Standards Documentation: - [] **Work Quality Checklists:** Step-by-step quality control procedures - [] **Safety Protocols:** Detailed safety requirements for all activities - [] **Customer Service Standards:** How to interact with customers professionally - [] **Equipment Care:** Proper use and maintenance of tools and vehicles - [] **Documentation Requirements:** What needs to be recorded and how

Standard Operating Procedures (SOPs): - [] **Job Setup:** How to prepare for each job - [] **Work Execution:** Step-by-step procedures for common tasks - [] **Quality Control:** Inspection and testing procedures - [] **Customer Communication:** When and how to

update customers - [] **Job Completion:** Cleanup, documentation, and handover procedures

Measurement and Tracking Systems

Key Performance Indicators (KPIs) for Team Members: - [] **Quality Metrics:** Rework rates, customer satisfaction scores, inspection results - [] **Productivity Metrics:** Jobs completed, hours worked vs. billable hours - [] **Safety Metrics:** Incidents, near-misses, safety compliance - [] **Customer Service Metrics:** Customer feedback, complaint resolution - [] **Professional Development:** Skills acquired, certifications earned

Tracking Tools: - [] **Daily Reports:** Simple forms for recording daily activities and results - [] **Weekly Scorecards:** Summary of key metrics for each team member - [] **Monthly Dashboards:** Visual representation of team and individual performance - [] **Project Tracking:** Progress monitoring for larger jobs - [] **Customer Feedback Systems:** Regular collection of customer satisfaction data

Consequences and Recognition

Progressive Discipline System: - [] **Verbal Warning:** First step for minor issues or mistakes - [] **Written Warning:** Documentation of continued problems - [] **Performance Improvement Plan:** Specific steps and timeline for improvement - [] **Final Warning:** Last chance before termination - [] **Termination:** When other steps haven't resolved the issues

Recognition and Reward Systems: - [] **Daily Recognition:** Acknowledge good work immediately when you see it - [] **Weekly Highlights:** Share success stories with the entire team - [] **Monthly Awards:** Formal recognition for outstanding performance - [] **Quarterly Bonuses:** Financial rewards tied to performance metrics - [] **Annual Celebrations:** Company-wide recognition events

Section 4: Communication and Conflict Resolution

Effective Communication Strategies

Daily Communication Rhythm: - [] **Morning Huddles (10 minutes):** Review the day's priorities and safety reminders - [] **Mid-Day Check-ins:** Brief status updates on job

progress - [] **End-of-Day Debriefs:** Discuss what went well and what could be improved - [] **Weekly Team Meetings:** Longer discussions about performance and improvements - [] **Monthly All-Hands:** Company updates and strategic discussions

Communication Tools and Methods: - [] **Face-to-Face:** Best for complex discussions and sensitive topics - [] **Phone Calls:** Good for urgent issues and quick clarifications - [] **Text Messages:** Appropriate for brief updates and confirmations - [] **Email:** Useful for documentation and non-urgent communications - [] **Team Apps:** Group messaging for coordination and updates

Handling Difficult Conversations

Preparation for Difficult Conversations: - [] **Define the Issue:** Be specific about the problem or concern - [] **Gather Facts:** Have concrete examples and documentation - [] **Choose the Right Time and Place:** Private setting without distractions - [] **Plan Your Approach:** Think about how to present the issue constructively - [] **Consider Their Perspective:** Try to understand their point of view

Conversation Structure: - [] **State the Purpose:** Be clear about why you're having the conversation - [] **Present the Facts:** Share specific examples without being accusatory - [] **Listen Actively:** Give them a chance to explain their perspective - [] **Collaborate on Solutions:** Work together to find ways to improve - [] **Agree on Next Steps:** Be specific about what will happen going forward

Conflict Resolution Framework

Types of Workplace Conflicts: - [] **Task Conflicts:** Disagreements about how work should be done - [] **Process Conflicts:** Disputes about procedures and methods - [] **Relationship Conflicts:** Personal tensions between team members - [] **Resource Conflicts:** Competition for tools, time, or assignments - [] **Communication Conflicts:** Misunderstandings and poor communication

Resolution Process: - [] **Address Issues Early:** Don't let small problems become big ones - [] **Stay Neutral:** Focus on facts and solutions, not taking sides - [] **Facilitate Discussion:** Help both parties express their concerns - [] **Find Common Ground:** Identify shared goals and interests - [] **Develop Solutions:** Create agreements that work for everyone - [] **Follow Up:** Check that the resolution is working

Section 5: Delegation and Empowerment

The Art of Delegation

What to Delegate: - [] **Routine Tasks:** Activities that don't require your specific expertise - [] **Development Opportunities:** Tasks that will help others grow - [] **Time-Consuming Activities:** Work that takes you away from high-value activities - [] **Specialized Skills:** Tasks that others can do better than you - [] **Recurring Responsibilities:** Regular activities that can be systematized

What NOT to Delegate: - [] **Strategic Decisions:** Major choices that affect the business direction - [] **Personnel Issues:** Hiring, firing, and serious disciplinary actions - [] **Customer Relationships:** Key client relationships that require your involvement - [] **Quality Control:** Final responsibility for work quality and standards - [] **Financial Management:** Major financial decisions and cash flow management

Delegation Process: - [] **Select the Right Person:** Match the task to the person's skills and development needs - [] **Provide Clear Instructions:** Be specific about what needs to be done and when - [] **Give Necessary Authority:** Ensure they have the power to complete the task - [] **Set Check-in Points:** Schedule regular progress reviews - [] **Provide Support:** Be available for questions and guidance - [] **Review Results:** Evaluate the outcome and provide feedback

Empowering Your Team

Creating an Empowered Environment: - [] **Trust Building:** Show confidence in your team's abilities - [] **Decision-Making Authority:** Give people power to make appropriate decisions - [] **Resource Access:** Ensure people have what they need to succeed - [] **Learning Opportunities:** Provide chances to develop new skills - [] **Mistake Tolerance:** Create a safe environment for learning from errors

Levels of Empowerment: - [] **Level 1:** Do exactly what I tell you to do - [] **Level 2:** Research the topic and report back to me - [] **Level 3:** Research the topic and recommend action for my approval - [] **Level 4:** Take action and report results immediately - [] **Level 5:** Take action and report results periodically

Section 6: Building Company Culture

Defining Your Culture

Core Values Development: Your values should reflect what's truly important in your business and guide decision-making at all levels.

Common Values in Successful Trades Businesses: - [] **Quality:** We do things right the first time - [] **Integrity:** We keep our promises and do what we say we'll do - [] **Safety:** Everyone goes home safe every day - [] **Respect:** We treat everyone with dignity and professionalism - [] **Excellence:** We continuously improve and strive to be the best - [] **Teamwork:** We support each other and work together toward common goals

Values Implementation: - [] **Hiring Decisions:** Use values as criteria for selecting team members - [] **Performance Reviews:** Evaluate people on values as well as results - [] **Recognition Programs:** Celebrate examples of values in action - [] **Decision Making:** Use values as a guide for difficult choices - [] **Customer Interactions:** Ensure values are reflected in customer service

Culture Building Activities

Daily Culture Reinforcement: - [] **Morning Huddles:** Start each day with positive energy and shared purpose - [] **Recognition Moments:** Acknowledge good work and values-based behavior - [] **Problem-Solving Approach:** Handle challenges in ways that reflect your values - [] **Customer Stories:** Share examples of great customer service - [] **Team Support:** Demonstrate how team members help each other

Regular Culture Events: - [] **Monthly Team Meetings:** Discuss culture and values, not just business - [] **Quarterly Social Events:** Build relationships outside of work context - [] **Annual Company Events:** Celebrate achievements and reinforce culture - [] **Training Sessions:** Include culture and values in all training programs - [] **Community Involvement:** Participate in community activities as a team

Maintaining Culture During Growth

Challenges of Growth: - [] **Dilution of Values:** New people may not understand or embrace the culture - [] **Communication Gaps:** Harder to maintain close

communication as team grows - [] **Consistency Issues:** Different locations or crews may develop different cultures - [] **Leadership Capacity:** Original leaders may not be able to influence everyone directly - [] **System Strain:** Informal systems may not work with larger teams

Growth Management Strategies: - [] **Culture Documentation:** Write down your values and cultural expectations - [] **Leadership Development:** Train multiple people to carry the culture forward - [] **Systematic Onboarding:** Ensure every new person learns the culture - [] **Regular Assessment:** Monitor culture health and address issues quickly - [] **Consistent Reinforcement:** Keep culture visible and important at all levels

Section 7: Leadership Development and Succession Planning

Developing Future Leaders

Identifying Leadership Potential: - [] **Natural Influence:** Others naturally look to them for guidance - [] **Problem-Solving Ability:** They find solutions rather than just identifying problems - [] **Communication Skills:** They can explain things clearly and listen well - [] **Reliability:** They consistently follow through on commitments - [] **Growth Mindset:** They're always looking to learn and improve

Leadership Development Program: - [] **Mentoring:** Pair high-potential people with experienced leaders - [] **Stretch Assignments:** Give them projects that challenge and develop them - [] **External Training:** Send them to leadership courses and seminars - [] **Cross-Training:** Expose them to different aspects of the business - [] **Gradual Responsibility:** Increase their authority and accountability over time

Succession Planning

Key Positions to Plan For: - [] **Owner/CEO:** Who could eventually run the entire business? - [] **Operations Manager:** Who could manage daily operations? - [] **Lead Technicians:** Who could lead crews and train others? - [] **Customer Service:** Who could handle customer relationships? - [] **Sales/Estimating:** Who could handle quotes and customer acquisition?

Succession Development Process: - [] **Skills Assessment:** Identify gaps between current and required capabilities - [] **Development Plans:** Create specific plans to build needed skills - [] **Experience Opportunities:** Provide chances to practice leadership skills - [] **Feedback and Coaching:** Regular guidance and performance feedback - [] **Timeline Planning:** Set realistic timelines for development and transition

Implementation Roadmap

Month 1: Foundation Assessment

- [] Evaluate your current leadership style and effectiveness
- [] Assess your team's performance and development needs
- [] Identify your company's core values and culture
- [] Document current systems and procedures
- [] Set leadership development goals

Month 2: System Development

- [] Create or update job descriptions and performance standards
- [] Implement regular communication rhythms (huddles, one-on-ones, team meetings)
- [] Establish performance tracking and measurement systems
- [] Begin documenting standard operating procedures
- [] Start regular recognition and feedback practices

Month 3: Team Development

- [] Conduct performance reviews with all team members
- [] Create individual development plans
- [] Implement training and cross-training programs
- [] Begin delegation of appropriate responsibilities

- ☐ Identify and begin developing future leaders

Month 4-6: Culture and Growth

- ☐ Reinforce company values and culture consistently
 - ☐ Refine systems based on initial results
 - ☐ Expand leadership development programs
 - ☐ Plan for future growth and succession needs
 - ☐ Measure and celebrate improvements in team performance
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Conclusion

Effective leadership and management in trades businesses requires a unique blend of technical credibility, people skills, and business acumen. You need to earn respect through your expertise while inspiring people to achieve more than they thought possible.

The framework provided here gives you proven strategies for building a strong team, creating accountability, and developing the leadership capabilities needed to grow your business beyond your personal capacity.

Remember: **Leadership is not about being perfect – it's about being authentic, consistent, and committed to helping others succeed.** Your team doesn't expect you to have all the answers, but they do expect you to care about their success and provide the guidance and support they need to excel.

Start with the areas where you can have the biggest immediate impact, then gradually build more sophisticated leadership and management systems as your skills and confidence grow.

The investment you make in developing your leadership abilities and building a strong team will pay dividends for years to come in the form of better performance, higher profitability, and a more enjoyable work environment for everyone.

About Steven Rouget

Steven Rouget is an ActionCOACH Business Coach with 23 years of experience helping trades and service business owners develop their leadership capabilities and build high-performing teams. He specializes in helping technical experts transition into effective business leaders who can grow their companies beyond their personal capacity.

Steven's approach combines practical leadership strategies with the realities of running trades businesses – where technical credibility, safety, and results matter as much as people skills.

Ready to develop your leadership skills and build a stronger team?

Contact Steven Rouget: 📞 0412 351 755

✉️ stevenrouget@actioncoach.com

🌐 stevenrouget.com.au

Book a Free Leadership Assessment: Visit stevenrouget.com.au to schedule your complimentary consultation and discover how these leadership and management strategies can be customized for your specific business situation and team needs.

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