Window replacement Business Plan: A Proven Sample for US Entrepreneurs

ClearView Windows & Energy Solutions LLC (Colorado LLC, founded January 15, 2024) provides residential window replacement services at $8,500 average job value to Front Range homeowners. We target $1.02M Year 1 revenue with 42% gross margins. Founder Michael Reynolds (ex-Renewal by Andersen Regional Manager, $5.2M annual P&L oversight) leads operations.

1. Executive Summary

44 million US homes built pre-1980 require window replacement (U.S. Census 2023), costing homeowners $1,200/year in excess energy bills (ENERGY STAR 2023). ClearView solves this with ENERGY STAR-certified window installations at $8,500 average job value, capturing 1.5% of Denver's $68M annual market in Year 1. We generate revenue through full-frame replacements (75% of jobs at $850/window), insert installations (20% at $750/window), and energy audits (5% at $199). Year 1 gross margin is 42% ($428,400 on $1.02M revenue) with break-even at 85 jobs (Month 14).

We seek $450,000: $200,000 SBA 7(a) loan (10-year term, 7.5% interest), $150,000 angel convertible note, $100,000 founder equity. Funds deploy as 32% startup costs ($146,800), 26% working capital ($117,000), 42% marketing/equipment ($186,200). This capital funds 85 jobs to break-even, captures 1.5% Denver market share by Year 1, and achieves 80 NPS. ROI: 22% by Year 4 with full investment return.

2. Company Overview

Colorado LLC formed January 15, 2024. Chosen for liability protection and pass-through taxation. Leased 2,500 sq. ft. facility in Englewood, CO (3200 E. Arapahoe Road) for central Denver metro access, 15-minute avg. drive time to 78% of target customers (Google Maps traffic analysis). Ownership: Michael Reynolds (60%), Sarah Thompson (20%), James Carter (10%), Denver Growth Partners (10% via $150k convertible note).

Michael Reynolds: 15 years home improvement ops; grew Renewal by Andersen Colorado from $1.8M to $5.2M revenue in 3 years. Sarah Thompson: Managed 12-person HVAC operations team, reduced scheduling errors by 37% via Jobber implementation. James Carter: 20+ years installation; trained 45+ technicians under EPA Lead-Safe protocols.

Date	Milestone	Status	Next Steps
Jan 2024	LLC formation & CO contractor license #C-123456	Complete	N/A
Mar 2024	Simonton supplier agreement signed	Complete	Negotiate 5% volume discount at 100 jobs
Apr 2024	HubSpot/Jobber integration live	Complete	Train sales team on CRM workflows
May 2024	First 10 jobs completed	Complete	Analyze CAC vs. projection
Jun 2024	Google Ads campaign launch	Complete	Optimize CPC below $4.80
Aug 2024	Break-even at 85 jobs	Target	Secure Colorado Springs sub-contractor
Dec 2024	Year 1: $1.02M revenue	Target	Apply for SBA loan renewal
Mar 2025	Expand to Colorado Springs	Target	Hire local sales rep ($65k base)

3. Market Analysis

TAM: $14.2B US residential window replacement (IBISWorld 2023). SAM: $210M Colorado market (IBISWorld adjusted for 5.2% CAGR). SOM: $1.02M Year 1 revenue (1.5% of Denver's $68M market). Calculation: 12,500 annual window replacement jobs in Denver metro (Census housing stock x 0.5% replacement rate); ClearView targets 120 jobs Year 1.

Target customer: Homeowners aged 45-65 in single-family homes (1970-1999 construction), median income $87,000. 68% cite energy savings as primary purchase driver (ENERGY STAR 2023). Budget range: $5,000-$15,000 (72% jobs under $10k). Buying behavior: 89% research online first, 63% require in-home estimates, 41% use financing.

Key trends: 1) IRA tax credits drive 32% market growth (J.P. Morgan 2024); 2) Vinyl window demand up 8.7% annually (NAHB); 3) Installer shortage increases wages 4.3% YoY (BLS); 4) Online quoting adoption at 61% (HomeAdvisor).

Segment	Size ($)	Growth Rate	Our Share Target	Rationale
Primary homeowners	42.5M	5.2%	1.5% Year 1	Direct mail + digital ads to 1970-1999 home owners
Real estate investors	8.2M	7.1%	0.8% Year 1	Partnerships with 15 top Denver agents
Insurance storm repairs	5.1M	9.3%	0.3% Year 1	Contract with 3 adjuster firms
Historic home owners	2.2M	4.0%	0.1% Year 1	Limited capacity; $15k+ jobs

Category	Total Addressable	Serviceable Available	Serviceable Obtainable	Methodology
US Market	$14.2B	N/A	N/A	IBISWorld R32111 report
Colorado	N/A	$210M	N/A	IBISWorld x state housing permits
Denver Metro	N/A	$68M	$1.02M	12,500 jobs x $8,500 avg. x 1.5%

4. Competitive Analysis

Market leaders: Renewal by Andersen ($18k avg. job, 12% Denver share), Window Nation ($12k avg. job, 9% share). Local independents average $9.5k/job but have 3.2/5 Google rating (vs. our 4.8 target). Key weaknesses: Renewal by Andersen 6-week install lead times; Window Nation 22% customer complaint rate (BBB).

ClearView advantages: 1) 10-year labor warranty (vs. industry 5-year standard) reducing warranty claims by 31% (NAHB data); 2) Simonton direct pricing at 18% below Renewal by Andersen; 3) IRA tax credit integration shortens sales cycle by 11 days; 4) Digital quoting converts 27% of leads (vs. local avg. 18%).

Competitor	Revenue Est.	Pricing	Key Strength	Key Weakness	Our Differentiation
Renewal by Andersen	$2.1M Denver	$18,000	Brand recognition	Slow install (6 wks)	2-week installs; 22% lower price
Window Nation	$1.6M Denver	$12,000	National scale	22% complaint rate	10-year warranty; NPS 80+ target
Mile High Window	$420k	$9,500	Local presence	3.2 Google rating	Digital quoting; IRA expertise
Home Depot	$1.1M	$10,500	Foot traffic	3rd-party installers	Certified in-house crews
DIY kits	$380k	$3,200	Low cost	37% failure rate	Free energy audit; 0% financing

Strengths	Weaknesses	Opportunities	Threats
Simonton direct pricing (18% below competitors)	Limited brand awareness (Year 1)	IRA tax credit expansion (2025)	Material cost inflation (glass +12% YoY)
10-year labor warranty (vs. 5-year standard)	Only 2 installation crews initially	Insurance storm repair contracts	Recession reducing home improvement spend
Digital quoting (27% conversion rate)	No weekend sales staff	Colorado Springs market expansion	Renewal by Andersen price cuts
EPA Lead-Safe certified crews	Dependent on single supplier (Simonton)	Utility company partnerships	New SBA loan rate hikes

5. Products & Services

Core service: Full-frame replacement (75% of jobs) includes removal, structural repair, Owens Corning insulation, 3M flashing, and Simonton double-hung windows. Process: 15-min digital quote -> 2-hour energy audit (thermal imaging) -> installation in 1-3 days. Customers receive 10-year labor warranty, ENERGY STAR certification docs, and IRA tax credit filing support.

Pricing targets 42% gross margin. Standard double-hung at $850 installed (Simonton cost $420, labor $220, materials $45). Upsell options: Smart glass (+$210/window), custom grids (+$75). Financing via Hearth 0% APR for 36 months drives 38% of sales (vs. 22% industry avg).

Tier	Price	Features	Target Customer	Expected % Revenue	Gross Margin
Basic Insert	$750	Existing frame reuse	Budget-conscious	20%	45%
Full-Frame Standard	$850	Double-hung, white	Primary homeowners	65%	42%
Premium Custom	$1,200	Casement, colors, smart glass	Upscale remodelers	12%	38%
Energy Audit	$199	Thermal imaging report	All prospects	3%	75%

Metric	Value	Calculation/Notes
Price per job	$8,500	10 windows x $850 avg.
COGS per job	$4,930	Windows ($3,150) + Labor ($1,320) + Materials ($270) + Audit ($190)
Gross Profit per job	$3,570	$8,500 - $4,930
Gross Margin %	42.0%	$3,570 / $8,500
CAC	$420	$50,400 annual marketing spend / 120 jobs

LTV	$1,700	1.2 jobs/customer x $3,570 gross profit x 40% retention rate
LTV:CAC	4.0x	$1,700 / $420
Payback Period	5.1 months	CAC / (Gross Profit per job x monthly retention)

6. Marketing & Sales

Digital channels drive 70% of leads. Google Ads target 15 keywords at $4.80 CPC (SEMrush 2024 data), yielding 1,042 clicks/month at $5,000 budget. Conversion rate 4.1% generates 43 leads/month. Facebook ads target homeowners 45-65 within 10 miles at $22.50 CAC, generating 37 leads/month. Referral program yields 20% of jobs at $100 effective CAC ($200 credit / 2 jobs).

Sales cycle: 80 leads/month -> 32 qualified (40% rate) -> 12 closed jobs (37.5% close rate). Process: Online quote (15 min) -> in-home audit (2 hrs) -> proposal with energy savings estimate -> 30% deposit ($2,550) to schedule. Average cycle: 22 days (vs. industry 33 days). Retention: 30-day satisfaction call targets 80 NPS; annual maintenance email drives 15% repeat jobs.

Channel	Monthly Budget	Expected CAC		E L Conversion Rate	Expected Customers/Month	ROI	
Google Ads	$5,000	$116		4337.5%	16	2,069%	
Facebook/Instagram	$2,500	$68		37	37.5%	14	3,456%
Referral Program	$1,000	$100		N/A100%	10	3,470%	
SEO/Content	$1,500	$250		6 37.5%	2	342%	
Partnerships	$500	$83		6 37.5%	2	3,145%	

Month	Google Ads	Social Media	Content/SEO	Events	Other	Total	Expected Leads	Expected Customers
1	3000	1500	1000	0	500	6000	35	13
2	4000	2000	1200	0	500	7700	45	17
3	5000	2500	1500	0	500	9500	56	21
4	5000	2500	1500	500	500	10000	58	22
5	5000	2500	1500	500	500	10000	58	22
6	5000	2500	1500	500	500	10000	58	22
7	5000	2500	1500	500	500	10000	58	22
8	5000	2500	1500	500	500	10000	58	22
9	5000	2500	1500	500	500	10000	58	22
10	5000	2500	1500	500	500	10000	58	22
11	5000	2500	1500	500	500	10000	58	22
12	5000	2500	1500	500	500	10000	58	22

7. Operations

Daily workflow: 8 AM crew dispatch -> 9 AM customer arrival -> 3 PM job completion (avg. 3 windows/crew/day). Capacity: 2 crews x 3 jobs/day x 22 days = 132 jobs/month (vs. target 10 jobs/month Year 1). Critical path: Simonton order -> 7-day lead time -> installation scheduling. Quality control: Post-install digital inspection checklist with 12-point verification.

Primary supplier: Simonton Windows (Kansas City distribution). Contract includes 2% rebate at $100k quarterly volume. Backup: Pella (30% higher cost). Technology stack: Jobber ($99/month/crew) for scheduling, HubSpot ($1,200/year) for CRM, QuickBooks Online ($30/month) for accounting.

Vendor/Supplier	Service	Monthly Cost	Contract Terms	Backup Option
Simonton Windows	Window supply	$0	Net 30; 2% rebate >$100k/quarter	Pella ($1,020/window)
Owens Corning	Insulation	$850	Monthly billing	Knauf ($1,200/mo)
3M	Flashing/sealants	$320	Annual contract	Grace Building ($410/mo)
Pinnacol Assurance	Workers' comp	$1,850	Annual premium	Travelers ($2,100/mo)
Home Depot Pro	Tools/equipment	$420	Pay-as-you-go	Lowe's Commercial ($480/mo)

Tool	Purpose	Monthly Cost	Users	Alternatives Considered
Jobber	Scheduling/invoicing	$198	6	ServiceTitan ($299)
HubSpot Sales Hub	CRM/lead tracking	$100	3	Salesforce ($75/user)
QuickBooks Online	Accounting	$30	2	Xero ($35)
Google Workspace	Email/docs	$24	6	Microsoft 365 ($20)
Mailchimp	Email marketing	$20	1	Constant Contact ($45)

8. Management Team

6 FTEs Year 1: CEO ($85k), COO ($75k), Sales Manager ($65k), 2 Installers ($55k each), Admin ($45k). Compensation: Base salary + 5% revenue bonus at >$1M revenue. No equity grants beyond founders. Advisory board: Linda Chen (ex-Pella Regional VP, 0.5% equity), Mark Rodriguez (SBA lending expert, $150/hr).

Month	Role	Salary	Priority	Source	Onboarding Time
1	CEO	$85,000	Core	Founder	N/A
1	COO	$75,000	Core	Founder	N/A
2	Sales Manager	$65,000	High	Indeed	30 days
3	Installer #1	$55,000	High	Trade school	45 days
3	Installer #2	$55,000	High	Trade school	45 days
4	Admin	$45,000	Medium	Craigslist	30 days
9	Sales Rep	$60,000	Low	Internal promotion	15 days
12	Installer #3	$58,000	Low	Referral	30 days

9. Financial Plan

Key assumptions: 10 jobs/month Year 1 (120 total), growing to 17.5 jobs/month Year 3. Average revenue per job: $8,500 Year 1, $8,900 Year 3 (2% annual upsell). Monthly churn: 3.1% (industry avg. 3-7%). COGS: 58% Year 1, improving to 56% Year 3 via volume discounts. CAC: $420 Year 1, $380 Year 3.

Revenue model: 75% full-frame replacements ($850/window), 20% insert ($750), 5% audits ($199). Growth drivers: 1) Google Ads scaling to 58 leads/month; 2) Referral program at 20% of jobs; 3) Real estate partnerships adding 8 jobs/month by Year 2.

Cost structure: 65% fixed costs (salaries, rent, software), 35% variable (materials, labor, payment processing). Fixed costs scale linearly with headcount; variable costs scale at 0.8x revenue growth. Year 1 OpEx: $398,000 ($33,167/month).

Funding: $450,000 total. $200,000 SBA loan (7.5% interest, $2,000/month payment), $150,000 angel note, $100,000 founder equity. Funds cover 8 months runway to break-even at Month 14. Milestones: 85 jobs (break-even), 80 NPS, $1.02M revenue.

Category	Ite	Cost	Notes
Legal/Formation	LLC filing	1,200	CO Secretar of State
Legal/Formation	Operating agreement	3,500	Specializ construc attorney
Licenses/Permits	CO contractor license	1,800	Renewal every 2 years
Licenses/Permits	EPA Lead-Safe cert	1,500	Per crew
Equipment	Installation tools	38,000	Milwauke (2 crews)
Equipment	Fleet vehicles (2 vans)	27,000	Down payment only

Technology Setup	CRM/Jobber setup	8,500	Custom integratio
Technology Setup	Website development	6,200	Lead capture optimizat
Initial Inventory	Windows stock (20 units)	18,500	Simonton standard models
Initial Inventory	Insulation/sealants	3,200	3-month supply
Marketing Launch	Google Ads deposit	2,500	Prepaid 3 months
Marketing Launch	SEO/content creation	8,500	10 landing pages
Working Capital	3 months payroll	62,000	$20,667 x 3
Working Capital	3 months OpEx	58,000	$19,333 x 3
Insurance	General liability ($2M)	4,200	Annual premium
Professional Fees	Accounting setup	3,500	QuickBo configura
Contingency (10%)		24,800	Of hard costs ($248,00

Total		248,000	

Category	T	Monthly Cost	Annual Cost		Notes
Rent	Fixed	3,000	36,000		2,500 sq. ft. @ $1.20/sq. ft.
Salaries	Fixed	23,333	280,000		6 FTEs; avg. $3,889/m
Benefits	Fixed	3,500	42,000		15% of payroll
Insurance	Fixed	1,500	18,000		Liability + workers' comp
Software	Fixed	1,000	12,000		Jobber, HubSpot, QuickBoo
Utilities	Fixed	500	6,000		Electric, internet, phone
Marketing	Variable	5,000	60,000		7% of revenue
Vehicle/Fuel	Variable	1,250	15,000		2 vans; $0.65/mil
Materials	Variable	29,750	357,000		58% of revenue ($510k/$8

Installation Labor	Variable	15,400	184,800		22 hrs/job x $24.50/hr x 10 jobs
Loan Payments	Fixed	2,000	24,000		SBA 7(a) principal + interest
Professional Services	Fixed	833	10,000		Accounting retainer
Fixed Total		33,333	400,000		
Variable Total		46,400	556,800		
Combined Total		79,733	956,800		

Line Item	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12	Year 1
Revenue	0	25,500	51,000	76,500	85,000	85,000	85,000	85,000	85,000	85,000	85,000	85,000	850,000
COGS	0	14,790	29,580	44,370	49,300	49,300	49,300	49,300	49,300	49,300	49,300	49,300	493,000
Gross Profit	0	10,710	21,420	32,130	35,700	35,700	35,700	35,700	35,700	35,700	35,700	35,700	357,000
Marketing	6,000	7,700	9,500	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	10,000	113,200
Salaries	15,000	23,333	23,333	23,333	23,333	23,333	23,333	23,333	23,333	23,333	23,333	23,333	268,333
Rent	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	3,000	36,000
Software	200	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	1,000	11,400
Insurance	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	1,500	18,000
Other OpEx	7,000	8,500	8,500	8,500	8,500	8,500	8,500	8,500	8,500	8,500	8,500	8,500	99,800
Total OpEx	33,200	45,033	46,833	47,333	47,333	47,333	47,333	47,333	47,333	47,333	47,333	47,333	546,733
EBITDA	-33,200	-34,323	-25,413	-15,203	-11,633	-11,633	-11,633	-11,633	-11,633	-11,633	-11,633	-11,633	-189,733
Depreciation	0	2,083	2,083	2,083	2,083	2,083	2,083	2,083	2,083	2,083	2,083	2,083	25,000
EBIT	-33,200	-36,406	-27,496	-17,286	-13,716	-13,716	-13,716	-13,716	-13,716	-13,716	-13,716	-13,716	-214,733
Interest	0	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	1,250	15,000

Taxes	0	0	0	0	0	0	0	0	0	0	0	0	0
Net Income	-33,200	-37,656	-28,746	-18,536	-14,966	-14,966	-14,966	-14,966	-14,966	-14,966	-14,966	-14,966	-229,733

Line Item	M1	M2	M3	M4	M5	M6	M7	M8	M9	M10	M11	M12
Beginning Cash	120,000	55,000	17,344	-11,402	-29,938	-44,904	-59,870	-74,836	-89,802	-104,768	-119,734	-134,700
Cash In (Revenue)	0	7,650	15,300	22,950	25,500	25,500	25,500	25,500	25,500	25,500	25,500	25,500
Cash In (Funding)	120,000	0	0	0	0	0	0	0	0	0	0	0
Total Cash In	120,000	7,650	15,300	22,950	25,500	25,500	25,500	25,500	25,500	25,500	25,500	25,500
Cash Out (COGS)	0	4,437	8,874	13,311	14,790	14,790	14,790	14,790	14,790	14,790	14,790	14,790
Cash Out (OpEx)	33,200	45,033	46,833	47,333	47,333	47,333	47,333	47,333	47,333	47,333	47,333	47,333
Cash Out (CapEx)	85,000	0	0	0	0	0	0	0	0	0	0	0
Cash Out (Debt)	0	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000	2,000
Total Cash Out	118,200	51,470	57,707	62,644	64,123	64,123	64,123	64,123	64,123	64,123	64,123	64,123
Net Cash Flow	1,800	-43,820	-42,407	-39,694	-38,623	-38,623	-38,623	-38,623	-38,623	-38,623	-38,623	-38,623
Ending Cash	55,000	17,344	-25,063	-64,757	-103,380	-142,003	-180,626	-219,249	-257,872	-296,495	-335,118	-373,741

Metric	Y1	Y2 Q1	Y2 Q2	Y2 Q3	Y2 Q4	Y3 Q1	Y3 Q2	Y3 Q3	Y3 Q4	Y3 Total
Revenue	1,020,000	418,500	439,425	461,396	484,466	508,689	534,124	560,830	588,872	2,192,515
COGS	591,600	242,730	254,866	267,609	280,990	295,039	309,792	325,281	341,546	1,271,658
Gross Profit	428,400	175,770	184,559	193,787	203,476	213,650	224,332	235,549	247,326	920,857
OpEx	398,000	155,000	155,000	155,000	155,000	190,000	190,000	190,000	190,000	760,000
EBITDA	30,400	20,770	29,559	38,787	48,476	23,650	34,332	45,549	57,326	160,857
Net Income	15,400	10,770	19,559	28,787	38,476	13,650	24,332	35,549	47,326	120,857

Ending Cash	-373,741	-258,000	-138,000	-14,000	114,000	127,000	151,000	186,000	233,000	233,000

Metric	Value	Calculation
Monthly Fixed Costs	33,333	Salaries + Rent + Software + Insurance
Variable Cost per Job	4,930	COGS breakdown
Price per Job	8,500	Average revenue
Contribution Margin per Job	3,570	8,500 - 4,930
Contribution Margin %	42.0%	3,570 / 8,500
Break-Even Units per Month	9.3	33,333 / 3,570
Break-Even Revenue per Month	79,050	9.3 x 8,500
Expected Break-Even Month	14	Cash flow projection
Safety Margin	6.5%	(10 jobs - 9.3) / 10

Metric	Y1	Y2	Y3	Industry Benchmark
Gross Margin %	42.0%	43.5%	42.0%	40-45%
Operating Margin %	3.0%	5.9%	5.5%	2-6%
Net Profit Margin %	1.5%	5.3%	5.5%	1-5%
Current Ratio	0.8	1.2	1.5	1.0+
Quick Ratio	0.5	0.9	1.2	0.8+

CAC Payback Period	5.1	4.7	4.3	6-18 months
LTV:CAC Ratio	4.0x	4.3x	4.5x	3x+
Monthly Burn Rate	31,630	0	0	N/A
Runway (months)	3.8	12+	12+	6-12

10. Risk Analysis

Top risks: 1) Material cost inflation (glass +12% YoY, probability 4/5, impact $48k revenue loss); 2) Installer turnover (32% industry rate, probability 3/5, impact 15% capacity loss); 3) SBA loan rate hikes (7.5% to 9.0%, probability 3/5, impact $3k/month); 4) Negative reviews (1 bad review = 22% lead drop, probability 2/5, impact $18k revenue).

Mitigation: 1) Lock 12-month Simonton pricing; include 5% escalation clause; 2) Pay $27/hr base + $3/hr retention bonus; 3) Fix 7.5% rate via SBA 7(a) guarantee; 4) Implement 100% post-install inspection; $500 service recovery fund.

Risk	Probability	Impact	Risk Score	Mitigation Strategy	Contingency Plan	Owner
Material cost inflation	4	4	16	12-mo Simonton contract; 5% escalation clause	Shift to Pella if >8% increase	CEO
Installer turnover	3	4	12	$30/hr retention bonus; career path	Subcontract 20% overflow jobs	COO
SBA rate increase	3	3	9	Lock rate via 7(a) guarantee	Refinance via SBA CAPLines	CEO
Negative online reviews	2	4	8	100% quality inspection; rapid response	Allocate $500/service recovery	COO
IRA credit expiration	2	3	6	Diversify into storm repair contracts	Target cash-paying historic homes	Sales Mgr
Recession impact	3	3	6	Emphasize energy savings ROI	Offer payment plans	CEO
Lead-Safe violation	1	5	5	Annual EPA training; digital logs	Third-party safety audits	Lead Installer
Google Ads CPC spike	3	2	6	Optimize for long-tail keywords	Shift budget to referral program	Sales Mgr

11. Implementation Timeline

Priority 1: Achieve 85 jobs by Month 14 to break-even. Critical path: Google Ads optimization (CPC < $4.80) and installer retention (turnover < 15%). Month 1-3: Focus on lead generation; Month 4-6: Optimize conversion; Month 7-12: Scale operations. Dependencies: SBA loan approval (Month 2), Simonton volume discount (100 jobs).

Month	Milestone	Deliverables	Resources Needed	Success Metric	Owner
1	Operations launch	CRM live; first crew trained	$85k startup capital	10 leads generated	CEO
2	SBA loan funding	$200k capital secured	Loan docs; financial projections	Loan approval	CEO
3	First 10 jobs	10 installations completed	2 crews; Simonton stock	90% customer satisfaction	COO
4	Google Ads optimization	CPC < $4.80	$5k/month budget	43 leads/month	Sales Mgr
5	Break-even path	65 cumulative jobs	10 jobs/month rate	Cash flow > -$150k	COO
6	Referral program launch	20% jobs from referrals	$1k/month budget	10 referral jobs	Sales Mgr
7	Simonton volume discount	2% rebate activated	100 jobs completed	$3,500 savings	CEO
8	Break-even achieved	85 cumulative jobs	10 jobs/month	Positive EBITDA	COO
9	NPS 80+ target	80+ customer score	30-day satisfaction call	80 NPS	COO
10	Year 1 revenue target	$1.02M revenue	10 jobs/month	$1.02M revenue	CEO
11	Colorado Springs expansion	Local sales rep hired	$65k salary budget	First job booked	CEO
12	Year 2 planning	180-job target set	Financial model update	15% revenue growth plan	CEO

12. Appendix

Available documentation: Simonton supplier agreement, SBA loan term sheet, CO contractor license #C-123456, 12-month cash flow model with sensitivity analysis. Key assumptions: 4.1% digital lead conversion (HomeAdvisor 2023 benchmark), 37.5% close rate (industry avg. 35-40%), 58% COGS (NAHB window replacement standard). All data sources cited in-text per IBISWorld, U.S. Census, ENERGY STAR, and BLS publications.