

Team Readiness Checklist

Every owner wants their employees to grow, but wanting it for them isn't the same as *them* wanting it. And being great at the work doesn't always mean being ready for a middle-management role.

"One of the biggest mistakes I made was assuming that everyone wants to just climb that ladder. Some people are perfectly happy, perfectly content. – **Rich Camacho, BlueRecruit**

With advice from [Sadi Ingallina of Grow Your Tree Co. and Rich Camacho of BlueRecruit](#), this team readiness checklist will help you:

- Learn how each employee wants to grow through career check-ins
- Look beyond trade skills to spot the traits strong leaders need
- Test someone's leadership skills on a small, low-risk job
- Prepare field employees for office tools and daily tasks
- Give new managers a clear path back if the role isn't the right fit

How to use: Start with the step that best matches where your employee is today. Review each item, check off what you already have in place, and use the unchecked items to plan what to do next. If someone is already preparing to move into management, start with Step 4.

1. Find Out What They Actually Want

Don't assume your best tech wants to be a manager. Some people want to stay in the field and get better at their trade, and the only way to find out is to ask directly in a one-on-one.

"Some people say, Hey, I want to become an HVAC tech because I want to be an HVAC tech to the day I retire." – **Rich Camacho, BlueRecruit**

Be upfront about pay, too. A move into management could mean a smaller paycheck at first, and nobody should find that out on payday. "Oftentimes going into a management role is actually an initial decline in compensation. People have to understand that this is all part of growing that ladder and not all steps are forward," said Rich.

Career Goals Checklist:

- ☐ You asked where they want to be next quarter, next year, and in five years
- ☐ You asked if they want to lead people, not just earn more or do less fieldwork
- ☐ You explained what the management role looks like day to day
- ☐ You explained what pay looks like in the first 30, 60, and 90 days
- ☐ You have a growth path for people who don't want management (senior tech, trainer, sales)

2. Make Career Check-Ins a Habit

Don't just book a single one-on-one and call it a day. Regular check-ins help you track how an employee's goals change and spot gaps between how they see their progress and how you see it.

Rich borrowed his one-on-one framework from the military. Before these routine meetings, the employee writes down:

- Three goals for the next quarter
- Three goals for the next year
- Three goals for the next five years
- Their three biggest wins since your last one-on-one

You write your own list of their three biggest wins, then compare. If the two of you see the same quarter completely differently, that's your signal to dig into what they actually want.

"It's really telling sometimes. When you're like, wow, that's what you think your three biggest [are] because these are my three biggest and these two are actually hurting the company." – **Rich Camacho, BlueRecruit**

Ongoing Check-Ins Checklist:

- ☐ One-on-ones happen on a set schedule, not when you remember
- ☐ Employees come prepared with written goals and wins
- ☐ You bring your own list of their top three wins to compare
- ☐ You ask about life outside of work
- ☐ You write down what they said so you can follow up next time

3. Look for Leadership Traits, Not Just Trade Skills

When someone stands out as a strong candidate for leadership, look beyond their technical skills. Skills can be taught, but how they handle a hard week is much harder to change. Strong leadership traits can be a clear sign someone is ready for more responsibility—but it takes time to see.

"The way people react to that will show their true character. You don't see it in a week. You don't see it in even a few months. It takes time to be able to see that." – **Sadi Ingallina, Grow Your Tree Co.**

Leadership Readiness Checklist:

- ☐ They show up on time and can be counted on
- ☐ They take responsibility when something goes wrong
- ☐ They stay steady when the day is long or the crew is short
- ☐ They look for a way forward when plans change
- ☐ Their crew respects them and listens to them
- ☐ They share credit and treat coworkers well
- ☐ They can speak clearly with customers

Pro Tip: Want to see your team's leadership in action? Rich sends everyone to at least one industry trade show a year. Watching people talk to customers in a new setting shows you who "might actually have some potential down the road for a higher-level position."

4. Test Their Leadership on a Low-Risk Job

Before making the promotion official, give your candidate a small leadership responsibility. Choose a low-risk job where they can learn from mistakes without putting the business at risk.

"Depending on the scenario, I'll test it a little bit, give them a smaller job to lead, give them a little bit more responsibility, something that's low risk on my end, but also you need to be able to lead and manage in order to accomplish the task." – **Sadi Ingallina, Grow Your Tree Co.**

Test Job Checklist:

- ☐ The job is low-risk for the business if it goes sideways
- ☐ They lead no more than one crew member
- ☐ They handle the customer conversation from start to finish
- ☐ They explain changes to the work when the scope shifts
- ☐ They ask for and collect payment
- ☐ You review what went well and what they would change
- ☐ If it goes well, the next test is a little harder

5. Train Them for the Office Side of the Role

Once a candidate has shown they can lead, the focus shifts from testing their readiness to preparing them for the role. Someone who is strong in the field may still need clear, patient training on the office tools and routines they'll use every day.

"You take someone out of the field from trees or gutters or wherever, and they may not have any idea how to use a computer. And us office dwellers, we can become completely oblivious and naive to that. – **Adam Sylvester, Charlottesville Lawn Care and Gutter Pros**

Sadi saw this firsthand with her operations manager: "One of my favorite humans on the planet, I had to teach him how to use the copier."

Field-to-Office Skills Checklist:

- ☐ Basic computer or phone tasks, like saving, printing, and scanning
- ☐ How often to check email, and how to write a clear reply
- ☐ How to read and update the schedule
- ☐ How to use your job management software
- ☐ How to handle a customer complaint
- ☐ What to write down, who to tell, and when to ask for help
- ☐ Office etiquette (response times, tone, who to cc, what to document)
- ☐ Who to escalate to, and when

6. Help Them Shift From Doing the Work to Leading It

Learning the office side of the role is only part of the transition. New managers also need to step back from doing the work themselves and learn how to get results through their team. To help make that shift, Sadi creates physical distance between the new manager and the crew.

"I physically remove the person from the job and force them to handle it from the office... then they're forced to think and figure out how to get somebody else to do it. And then when they don't do it, reiterate and then check in to make sure that it got done and then check in again." – **Sadi Ingallina, Grow Your Tree Co.**

Be open with the team that this is a training period, not a done deal. Rich compares it to signing his son up for a season of baseball. You commit to the season, see how it goes, and decide what comes next based on what you learn.

New Manager Transition Checklist

- ☐ Everyone knows this is a training period, not a done deal
- ☐ The employee knows what success looks like
- ☐ You wrote down the training and support you gave them
- ☐ You check in often about what's working and what feels hard
- ☐ You improve your training before you decide they can't do the job
- ☐ There is a clear, respected role for them if management isn't the right fit
- ☐ The final conversation names what they do well, not only what went wrong
- ☐ Their pay doesn't punish them for trying

Pro Tip: Training not going as planned? Before deciding someone isn't right for the job, take a closer look at how you're teaching them. "Is this person really just not cut out for it or can I improve my training process so that they can succeed?" said Sadi.

Build a Growth Path That Fits the Person

Promoting your best tech isn't automatically a mistake. Promoting them without asking, without testing, and without training them for the parts of the job they've never done is.

Start by learning what they want from their career and whether managing people is part of that plan. Then give them small, low-risk chances to lead and provide clear training on the office tasks and team responsibilities that come with the role.

With the right path and support, a promotion stops being a gamble. It becomes a clear next step that gives your employee room to grow into the role.

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