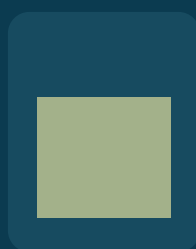


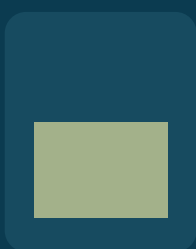
VORTOX LAB WHITEPAPER

Commercial Maintenance RFPs

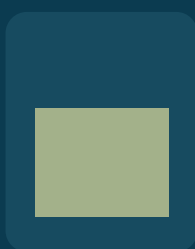
What property managers score, what your team should decline, and how to standardize the bid.



Fit



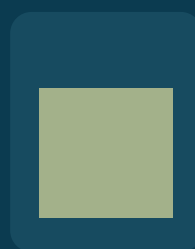
Scope



Access



Terms



Renewal

Bid only when the contract fits the route, crew, scope, and payment terms.

Built for landscaping and green-industry companies running crews, estimates, contracts, and seasonal demand.

HOW TO USE THIS PAPER

Read the constraint before the channel

A commercial maintenance RFP should be scored before it is priced. Route fit, scope clarity, labour availability, access, payment terms, communication load, and renewal potential determine whether the contract deserves estimator time.

EVIDENCE NOTE

This paper is an operating framework. It does not claim an unpublished client dataset or client result. Worked examples and diagrams are illustrative until replaced with your verified data.

Built for

Commercial maintenance operators bidding portfolio work, multi-site contracts, HOA communities, facilities, and branch-level opportunities.

Three decisions this paper should change

The largest contract can become the least profitable route.

Ambiguous scope transfers risk to the contractor after award.

A polished proposal cannot repair missing insurance, references, site notes, or an unrealistic mobilisation plan.

Use the method, then audit the full system.

A written growth audit identifies the constraint, account gaps, and first ninety-day priorities.

[Book a growth audit](#)[Growth packages from \\$2,000/mo](#)

THE OPERATING PROBLEM

More activity does not fix the wrong constraint

A commercial maintenance RFP should be scored before it is priced. Route fit, scope clarity, labour availability, access, payment terms, communication load, and renewal potential determine whether the contract deserves estimator time.

01	The largest contract can become the least profitable route.
02	Ambiguous scope transfers risk to the contractor after award.
03	A polished proposal cannot repair missing insurance, references, site notes, or an unrealistic mobilisation plan.

OWNER TEST

Can you name the point where a new enquiry becomes booked work, profitable crew time, and retained revenue? If not, the report stops too early.

DIAGNOSTIC

Find the weak layer before changing spend

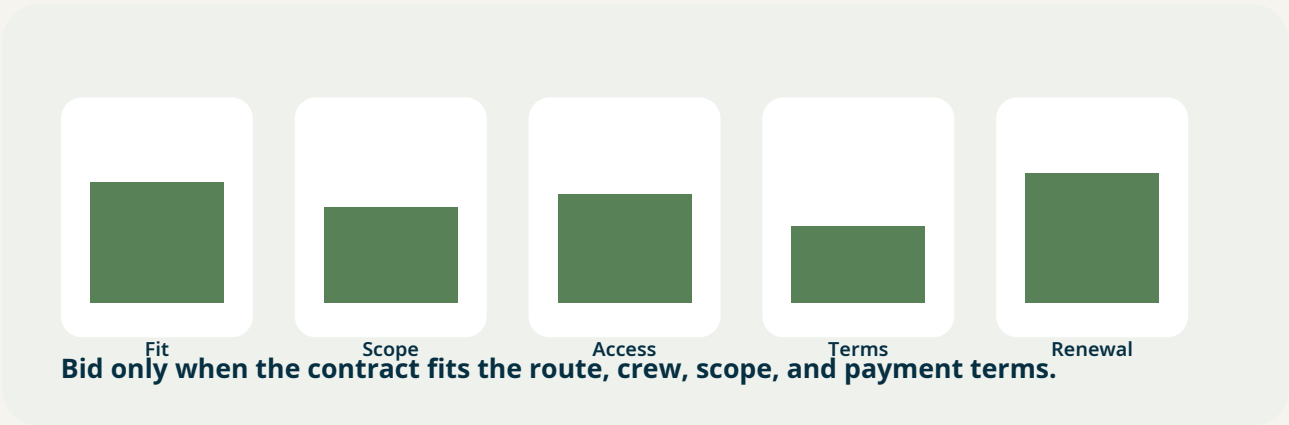
Layer	Question	Failure signal
Demand	Are enquiries for the work and territory you want?	Price shoppers, wrong services, out-of-zone requests
Response	Does one person or system own the first action?	Voicemail, slow forms, duplicate follow-up
Sales	Do qualified leads book, attend, and close?	Proposal ageing, no-shows, weak handoff
Delivery	Can crews service the work at the planned margin?	Overtime, drive time, backlog, rework
Retention	Does recurring or contract work renew?	Late renewal, complaints, price-only conversations

- ☐ One source name per channel
- ☐ One booked-estimate definition
- ☐ One renewal date per contract or programme
- ☐ One owner per lead
- ☐ One capacity view by week
- ☐ One exception list for missing data

THE MODEL

The bid or no-bid scorecard

Score the opportunity before the site walk. Re-score it after scope clarification. A low score is a management decision, not a sales failure.



- Fit: geography, service line, branch, and crew capacity.
- Scope: measurable frequencies, inclusions, exclusions, and standards.
- Commercial terms: payment, escalation, term, and cancellation.
- Delivery risk: access, irrigation, snow, safety, and subcontracting.
- Retention value: portfolio expansion, relationship, and renewal fit.

WORKED EXAMPLES

Any sample values in this paper show the calculation method only. Replace them with verified account, sales, job, and margin data before publishing or making a budget decision.

THE OPERATING METHOD

Run the work in a sequence the team can repeat

01	Build a qualification gate before assigning estimator hours.
02	Run the site walk with a standard photo and condition checklist.
03	Separate base scope, alternates, allowances, and exclusions.
04	Price labour, materials, equipment, travel, supervision, and reporting.
05	Submit a clear response plan, then track questions, addenda, and decision dates.

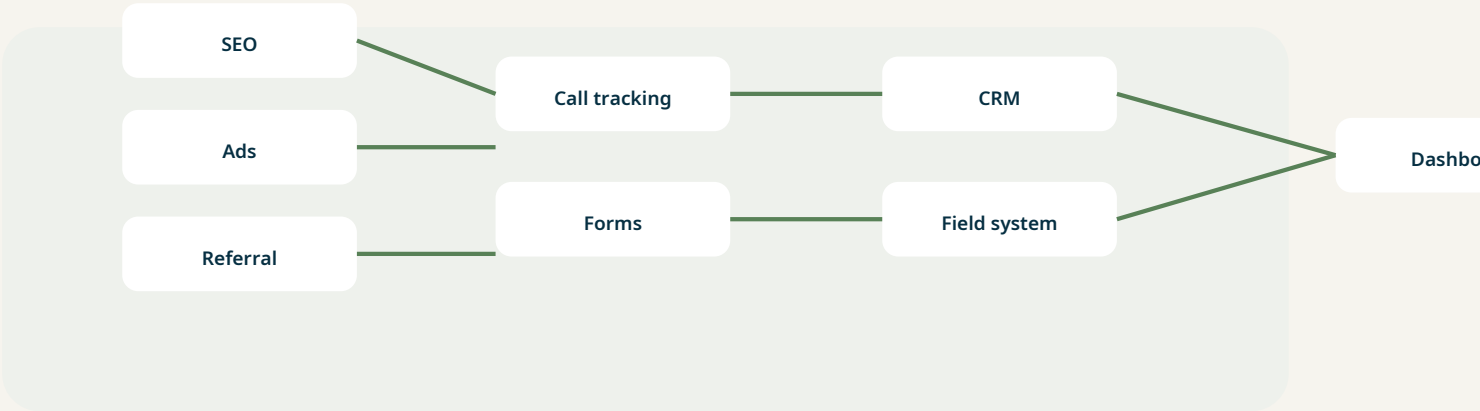
The weekly meeting

- Review exceptions before averages.
- Name the owner and due date for every correction.
- Separate marketing action from sales or operations action.
- Stop spend when capacity or route fit is the binding constraint.

SYSTEMS AND OWNERSHIP

Keep one source of truth for each operating layer

Store RFP documents, site photos, questions, pricing versions, certificates, and approvals in one opportunity record. Proposal software can format the response, but your CRM and field system should keep the commercial history.

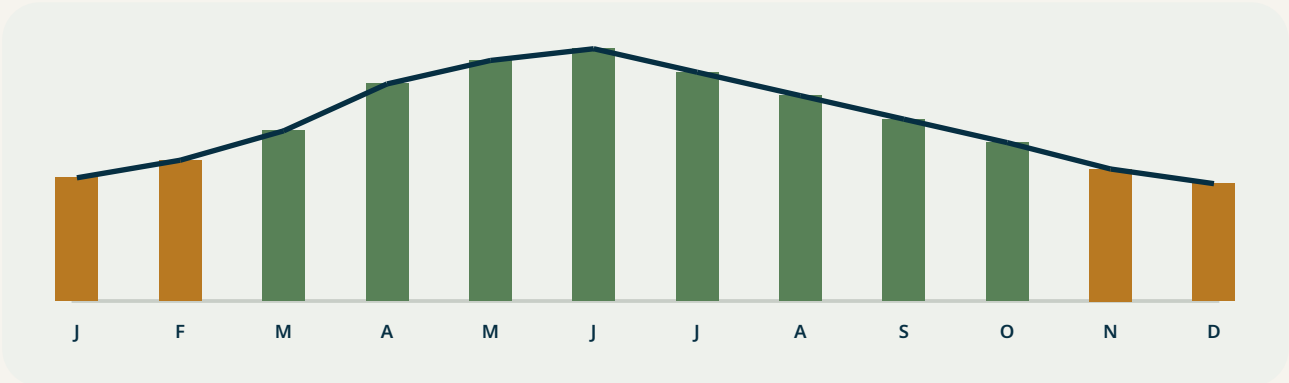


Layer	System owner	Minimum record
Website and channel	Marketing	Source, campaign, landing page, call or form ID
Sales	CRM or pipeline	Lead owner, qualification, estimate, status, next action
Delivery	Field software	Job, crew, route, schedule, invoice, service history
Financial	Accounting	Collected revenue, committed cost, margin inputs
Management	Dashboard	Exceptions, operating measures, decisions, owner

GREEN INDUSTRY CONTEXT

Plan around the operating calendar, not a flat twelve-month budget

September and October are often heavy renewal and budgeting months for commercial work. A bid team that starts gathering site conditions, insurance records, and route capacity after the deadline is already behind.



Window	Primary operating question
January to March	What systems, scripts, pages, and spring capacity must be ready before demand rises?
April to June	Where is response, estimating, route fit, or crew capacity losing the value of demand?
July to September	Which services, contracts, and fall campaigns deserve budget and operational attention?
October to December	Which renewals, winter offers, reporting fixes, and next-spring builds happen now?

MEASUREMENT

Report the operating decision, not a pile of channel numbers

Measure	Current	Target	Owner	Next action
Bid or no-bid score				
Estimator hours per submission				
Bid-to-shortlist rate				
Shortlist-to-win rate				
Mobilisation cost				
Gross margin by contract				
Change orders and scope disputes				
Renewal and expansion potential				

Monthly report order

- What changed against the company baseline.
- Why it changed, with exceptions named.
- What the team changed this month.
- What will be measured next.
- What cannot yet be claimed because the data is incomplete.

PROOF RULE

A result becomes publishable only when a named client approves the figure and the measurement method. Until then, show the process and the measures.

NINETY-DAY PLAN

Build the minimum system, then improve it from live data

Days 1-15	build the qualification gate and document list.
Days 16-30	standardize the site walk and pricing workbook.
Days 31-60	create proposal modules, approvals, and follow-up.
Days 61-90	review wins, losses, margin, and estimator time by RFP type.

What Vortex Lab would inspect first

- Account ownership and access.
- Tracking from source to booked work.
- Response and qualification rules.
- Service-line capacity and route fit.
- Seasonal priorities and renewal dates.

Get the written audit before the build.

We send the written audit within three working days, then book a 30-minute call.

[Book a growth audit](#)

[Growth packages from \\$2,000/mo](#)

OPERATOR WORKSHEET

Put your own baseline into the model

Use one row per service line, branch, route, campaign, contract, or operating period. The purpose is to identify the next decision, not to create another report nobody uses.

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ Definition agreed
- ☐ Owner named
- ☐ Target tied to capacity
- ☐ Exception recorded
- ☐ Source verified
- ☐ Baseline entered
- ☐ Next action dated
- ☐ Review scheduled

NO DATA YET

Start with ten manually reconciled records. A small accurate sample is more useful than a dashboard built on unmatched names and missing outcomes.

OPERATOR APPENDIX

Opportunity intake

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
- ☐ What costs time, margin, or renewal risk if nothing changes?
- ☐ Who owns the next action and when is it due?

OPERATOR APPENDIX

Initial qualification

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
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OPERATOR APPENDIX

Bid or no-bid approval

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
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OPERATOR APPENDIX

Site-walk agenda

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Questions and addenda log

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
- ☐ What costs time, margin, or renewal risk if nothing changes?
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OPERATOR APPENDIX

Pricing review

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
- ☐ What costs time, margin, or renewal risk if nothing changes?
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OPERATOR APPENDIX

Executive approval

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
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OPERATOR APPENDIX

Submission checklist

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Interview preparation

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

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OPERATOR APPENDIX

Decision follow-up

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

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OPERATOR APPENDIX

Turf and mowing scope

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Enhancement allowance

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
- ☐ What costs time, margin, or renewal risk if nothing changes?
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OPERATOR APPENDIX

Irrigation scope

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Plant health care scope

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Snow and ice scope

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
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OPERATOR APPENDIX

Reporting and communication

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
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OPERATOR APPENDIX

Safety and access

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

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OPERATOR APPENDIX

Mobilisation plan

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
- ☐ What costs time, margin, or renewal risk if nothing changes?
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OPERATOR APPENDIX

Staffing and supervision

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Exclusions and assumptions

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Insurance and certificates

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
- ☐ What costs time, margin, or renewal risk if nothing changes?
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OPERATOR APPENDIX

Payment and credit review

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Contract term and cancellation

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
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OPERATOR APPENDIX

Subcontractor review

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
- ☐ What costs time, margin, or renewal risk if nothing changes?
- ☐ Who owns the next action and when is it due?

OPERATOR APPENDIX

Equipment and material risk

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
- ☐ What costs time, margin, or renewal risk if nothing changes?
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OPERATOR APPENDIX

Route-density impact

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
- ☐ What costs time, margin, or renewal risk if nothing changes?
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OPERATOR APPENDIX

Shortlist debrief

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Loss review

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
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OPERATOR APPENDIX

Award handoff

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
- ☐ What costs time, margin, or renewal risk if nothing changes?
- ☐ Who owns the next action and when is it due?

OPERATOR APPENDIX

Thirty-day mobilisation review

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
- ☐ What costs time, margin, or renewal risk if nothing changes?
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OPERATOR APPENDIX

Renewal preparation

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
- ☐ What costs time, margin, or renewal risk if nothing changes?
- ☐ Who owns the next action and when is it due?

OPERATOR APPENDIX

Portfolio expansion plan

Complete the scorecard before estimator time is committed. Add site-specific notes after the walk-through and record the management decision to bid or decline.

Owner	Review date	Status
		Not started / Active / Closed

Measure	Current	Target	Owner	Next action
Opportunity fit				
Scope clarity				
Route fit				
Labour capacity				
Payment terms				
Delivery risk				
Renewal value				
Bid decision				

- ☐ What changed since the last review?
- ☐ Which assumption is still unverified?
- ☐ What costs time, margin, or renewal risk if nothing changes?
- ☐ Who owns the next action and when is it due?

NEXT STEP

The proposal is one part of it. We run the whole growth system.

Marketing, technology, reporting, and operational planning under one team.

Fit

Scope

Access

Terms

Renewal

Bid only when the contract fits the route, crew, scope, and payment terms.

The growth audit

We review the accounts, website, tracking, response path, service mix, seasonal priorities, and the operating constraint. You receive a written priority list within three working days, then a 30-minute call. No contract, no obligation, and no mailing-list add.

Book a growth audit. See the constraint clearly.

Growth packages start at \$2,000 per month. Ad spend is excluded.

Book a growth audit

Growth packages from \$2,000/mo

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