



MARGIN MAX

THE OPERATING SYSTEM

The Margin Max Operating System.

Six command centers and one intelligence layer — installed inside the tools you already run. This is the architecture Margin Max builds into a founder-led business.

OPERATIONAL INFRASTRUCTURE · NOT SOFTWARE

An operating system, installed inside your business.

Margin Max is not software you buy off the shelf. It is an operating system we install inside the tools you already use — JobNimbus, AccuLynx, ServiceTitan, HubSpot, QuickBooks, Google Sheets, Excel, and your existing workflows. The diagrams in this document are visual models of what gets built into your stack; there is nothing new to migrate to.

Every question a founder asks about money, work, and growth is answered by one of six purpose-built **command centers**. Above them sits **Maximus**, an intelligence layer that reads across all six, surfaces what matters, and recommends the next move.

The result: cleaner numbers, cash that moves on a schedule, and a team that runs the playbook without the owner in every meeting. We install the systems, embed the weekly rhythm, and stay until the team is running them without us.

\$372,865

Supplement revenue captured across 98 tracked claims in five months

\$1.5M+

Aged AR recovered inside 90 days through restructured collections

98 / 98

Reporting integrity checks reconciled before leadership reads them

6 + 1

Six command centers, one Maximus intelligence layer

Figures are real outcomes from recent Margin Max engagements; clients and account-level values are held in confidence.

What founder-led companies struggle with.

Revenue hides operational problems. A growing top line can mask the fact that the business still depends on the founder's memory, and that every real decision still lands on one desk.

Across roofing, construction, and home-service operators, the same pattern repeats:

- The numbers aren't visible weekly — leadership reacts to month-end, not to this week.
- Cash is a surprise. There is no forward view of the next 13 weeks.
- Receivables age silently; cash sits trapped in collections nobody is driving.
- Jobs lose margin in the field and it isn't seen until the job is closed.
- The pipeline is a guess, so next quarter's revenue is a guess.
- Accountability routes through the owner instead of through a system.
- The operation lives in the founder's head — not in something the team can run.

Strong businesses eventually require stronger operating systems. The fix is not more willpower or another dashboard nobody opens — it is an installed operating system that makes the numbers visible and the team answerable to them.

Six command centers. One operating discipline.

Each command center answers one executive question and owns the numbers behind it. Together they produce a single, connected operating picture of the business.

- | | |
|---|--|
| ■ 01 • Executive — Where do we stand today? | ■ 04 • Revenue Engine — Where does revenue come from? |
| ■ 02 • Cash Flow — Can we cover the next 13 weeks? | ■ 05 • Production Control — Which jobs hurt margin? |
| ■ 03 • AR Recovery — How much cash is trapped? | ■ 06 • Executive Scorecard — Are we hitting the number? |

The pages that follow detail each center: the executive question it answers, the core KPIs it surfaces, and the outcome it produces once installed inside your existing tools.

● 01 • EXECUTIVE **Executive Command Center**

LIVE

**“Where does my business stand right now
— and what needs my attention today?”**

- Cash position
- Net margin %
- AR over 60 days
- Jobs at risk

Outcome: Total command of the business from one screen — faster, more confident decisions every single day.

● 02 • CASH FLOW **Cash Flow Command Center**

POSITIVE

**“Will I have enough cash to cover the next
13 weeks?”**

- 13-week cash forecast
- Cash runway (days)
- Inflows vs. outflows
- Weekly burn rate

Outcome: Never blindsided by a cash crunch — liquidity is forecast, defended, and always in view.

03 · AR RECOVERY

AR Recovery Command Center

DSO 47

“Who owes me, how old is it, and what is getting collected this week?”

- Total AR balance
- Days sales outstanding
- % past due
- Promised-to-pay \$

Outcome: Faster collections and a lower DSO — cash trapped in receivables comes back to work.

04 · REVENUE ENGINE

Revenue Engine Command Center

PIPELINE

“Where is new revenue coming from, and is the pipeline healthy enough to hit the number?”

- Pipeline value
- Win rate
- Average deal size
- Booked vs. target

Outcome: A predictable revenue engine and a pipeline that reliably funds the growth plan.

05 • PRODUCTION **Production Control Command Center**

38 JOBS

“Are jobs on schedule, on budget, and actually profitable?”

- Jobs on-schedule %
- Budget variance
- Gross margin per job
- WIP aging

Outcome: Protected job margins with on-time, on-budget delivery — no profit leaks in the field.

06 • SCORECARD **Executive Scorecard Command Center**

VS PLAN

“Are we hitting the numbers that matter this month and this quarter?”

- KPI attainment %
- Revenue vs. plan
- EBITDA
- Goal progress

Outcome: Clear accountability and visible momentum against the plan — every owner knows the score.

How Maximus functions.

Six command centers give you the numbers. Maximus tells you what to do with them.



Maximus

INTELLIGENCE LAYER

Reads every center. Connects the signals across cash, AR, revenue, production, and accountability. Surfaces the one move that matters today and recommends the next step — so the owner leads from insight, not from a stack of reports.

Maximus is what turns six dashboards into one operating system. Instead of asking the owner to interpret every number, it watches the relationships between centers — an aging receivable that threatens next month's runway, a slipping job that will erode the quarter's margin, a pipeline gap that puts the plan at risk — and elevates the few things that need a decision now.

The effect is leverage: the operator spends time on judgment, not on assembling the picture.

The 90-day installation.

Margin Max installs the operating system in a focused 90-day engagement. The diagnostic comes before the prescription — nothing is built until we understand how the business actually runs.

01

DAYS 1-15 • DIAGNOSE

Read the operation.

A structured field study and the Operational Maturity Diagnostic score the business across six categories. The findings — not a template — determine which centers to install, in what order, and how deep.

02

DAYS 15-70 • INSTALL

Build the systems into your stack.

We install the focused set of command centers the operation needs — inside the CRM, spreadsheets, reporting, and workflows the team already uses. One reporting surface. Clear ownership. Cash forecasting and guardrails. Stage and reconciliation accountability.

03

DAYS 70-90 • EMBED

Hand the controls to the team.

We install the weekly leadership rhythm, scorecards, and review cadence, then train and transition the in-house team to run the system. We stay until the team is running it without us.

Live command-center views.

Each center renders as a working view inside your existing tools — reconciled nightly, read continuously by Maximus. Representative views:

● APP · EXECUTIVE Executive Command Center

SYNCED 6:02 AM

Cash position, net margin, aged AR, and jobs-at-risk on a single pane — the owner's daily standing.

Cash position

Net margin %

AR > 60 days

Jobs at risk

● APP · CASHFLOW 13-Week Cash Flow Forecast

UPDATED NIGHTLY

Inflow vs. outflow and projected ending balance, thirteen weeks out — liquidity defended before it's a problem.

Projected balance

Runway (days)

Weekly burn

Coverage

See the full six-center walkthrough at marginmaxllc.com/platform-preview.



START HERE

Strong businesses eventually require stronger operating systems.

Start with a 30-minute Executive Review. Jeremy walks your situation, surfaces the highest-risk patterns, and recommends the right next step. No pricing pressure. No sales pitch.

Book your 30-Minute Executive Review →

cal.com/marginmax/30-min-executive-review

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