



From Taking Over to Taking Control

An Initiate Success Story



Business: Tri-Lakes Appliance Repair

Industry: Appliance Repair & Retail

Founded: August 2023

Owners: Tammy and James Roerig

Tri-Lakes Appliance Repair provides in-shop and in-home appliance repair, sells appliance parts, and offers Speed Queen washers and dryers. Beyond business, their mission includes giving back—repairing and donating used appliances to families in need.

The business began unexpectedly. After multiple conversations with a retiring owner, what started as a simple parts purchase turned into an opportunity that felt “meant to be.” Within months, they stepped into ownership and began building the business back (as a lot of the community thought it was shutting down).

The Challenge

Like many new business owners, the early days were focused on simply keeping up. On top of just trying to learn the business, they were determining ways to stream-line their procedures, and figure out the things that go along with owning and running a business - Things like employee policies, taxes, legal protections, accounting, and so much more; all of this felt overwhelming and unclear.

They were navigating:

- Understanding financials and cash flow
- Preparing for future financing (including purchasing their building)
- Managing operations, hiring, and compliance
- Figuring out what systems and processes were even needed

How Initiate Helped

Via Initiate, the online learning platform, Tri-Lakes Appliance Repair gained access to structured, easy-to-use resources that helped them move from reactive to proactive.

They actively used:

- Financial tools (cash flow and budgeting)
- Business planning and growth guides
- Operations and job quality resources
- Marketing tools and strategies
- Employee handbook and onboarding checklists

What stood out most was the organized, searchable format. The step-by-step checklists and practical tools made it easier to understand what needed to be done—and how to do it.



TRI-LAKES APPLIANCE REPAIR

What Changed

With Initiate, the team developed a clearer understanding of what it really takes to run a business. They moved from “Just figuring it out day by day” to having structure, systems, and direction.

Key improvements included:

- Better financial awareness and planning
- Stronger operational systems (including SOPs and onboarding processes)
- Creation of an employee handbook and clearer policies
- More intentional marketing, especially during slow seasons
- Increased confidence in decision-making (like when to hire)

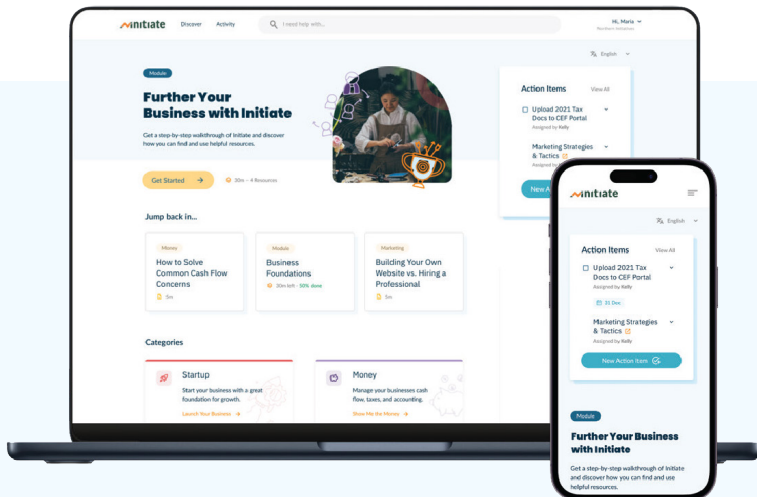
Looking Ahead

Today, Tri-Lakes Appliance Repair feels more prepared, focused, and forward-looking. Instead of just keeping up, they are now:

- Planning for growth
- Setting clear goals
- Building systems to support employees
- Making informed decisions about the future

They’ve shifted from survival mode to building a business with intention. With a stronger foundation in place, the business is now working toward long-term goals—like purchasing their building and continuing to grow their team and impact in the community.

“In the beginning, it was just figuring out how to run the business. Now, we have a plan to work toward and the tools to get there.”



Let's Connect: Interested in exploring how Initiate can support your technical assistance strategy?

Schedule a 15-minute demo. Ask about coalition member pricing.
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