

# FIND THE LEAK

A quick owner-level self-assessment to identify where opportunity is bleeding after the lead arrives.

*Answer honestly. This is for clarity — not judgment.*

## SECTION 1 — LEAD EFFECTIVENESS

*(Before the appointment)*

Check the box that best reflects what usually happens.

- |   |                                 |                                    |                                 |                                     |
|---|---------------------------------|------------------------------------|---------------------------------|-------------------------------------|
| 1. New leads receive a clear explanation of what happens next.            | <input type="checkbox"/> Always | <input type="checkbox"/> Sometimes | <input type="checkbox"/> Rarely | <input type="checkbox"/> Don't know |
| 2. Follow-up happens quickly and consistently.                            | <input type="checkbox"/> Always | <input type="checkbox"/> Sometimes | <input type="checkbox"/> Rarely | <input type="checkbox"/> Don't know |
| 3. Customers arrive knowing roughly what to expect on price and timeline. | <input type="checkbox"/> Always | <input type="checkbox"/> Sometimes | <input type="checkbox"/> Rarely | <input type="checkbox"/> Don't know |
| 4. Different team members describe the process the same way.              | <input type="checkbox"/> Always | <input type="checkbox"/> Sometimes | <input type="checkbox"/> Rarely | <input type="checkbox"/> Don't know |
| 5. Salespeople sound confident before the appointment begins.             | <input type="checkbox"/> Always | <input type="checkbox"/> Sometimes | <input type="checkbox"/> Rarely | <input type="checkbox"/> Don't know |

If "Sometimes," "Rarely," or "Don't know" appears more than once → **circle this section header.**

## SECTION 2 — SALES PROCESS

*(At the table)*

- |   |                                 |                                    |                                 |                                     |
|---|---------------------------------|------------------------------------|---------------------------------|-------------------------------------|
| 1. Appointments follow a consistent sequence.                             | <input type="checkbox"/> Always | <input type="checkbox"/> Sometimes | <input type="checkbox"/> Rarely | <input type="checkbox"/> Don't know |
| 2. Customers are guided toward a decision — not left to "think about it." | <input type="checkbox"/> Always | <input type="checkbox"/> Sometimes | <input type="checkbox"/> Rarely | <input type="checkbox"/> Don't know |
| 3. Management can tell where deals stall.                                 | <input type="checkbox"/> Always | <input type="checkbox"/> Sometimes | <input type="checkbox"/> Rarely | <input type="checkbox"/> Don't know |
| 4. Quotes reflect a consistent value story.                               | <input type="checkbox"/> Always | <input type="checkbox"/> Sometimes | <input type="checkbox"/> Rarely | <input type="checkbox"/> Don't know |
| 5. Close rate does not depend on one standout salesperson.                | <input type="checkbox"/> Always | <input type="checkbox"/> Sometimes | <input type="checkbox"/> Rarely | <input type="checkbox"/> Don't know |

If "Sometimes," "Rarely," or "Don't know" appears more than once → **circle this section header.**

## SECTION 3 — EXECUTION & HANDOFFS

*(After the sale)*

- |   |                                 |                                    |                                 |                                     |
|---|---------------------------------|------------------------------------|---------------------------------|-------------------------------------|
| 1. Handoffs between departments are clearly defined.    | <input type="checkbox"/> Always | <input type="checkbox"/> Sometimes | <input type="checkbox"/> Rarely | <input type="checkbox"/> Don't know |
| 2. Installers receive complete, consistent information. | <input type="checkbox"/> Always | <input type="checkbox"/> Sometimes | <input type="checkbox"/> Rarely | <input type="checkbox"/> Don't know |
| 3. Exceptions require intentional approval.             | <input type="checkbox"/> Always | <input type="checkbox"/> Sometimes | <input type="checkbox"/> Rarely | <input type="checkbox"/> Don't know |

# DESIGN THE FIRST FIX

You do not fix everything. You fix one thing on purpose.

## SECTION 5 — IDENTIFY THE PRESSURE POINT

Which section created the most discomfort?

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Where do you personally step in to "save the day"?

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What decision currently feels too easy to make under pressure?

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## SECTION 6 — ADD INTENTIONAL FRICTION

What is one guardrail, rule, or sequence you could design to slow down the wrong decision?

*Examples: Approval required before using higher-cost labor / Standardized explanation before quoting / Defined next step before customer leaves*

## SECTION 7 — DEFINE "GOOD"

What should "good" look like when this works without you?

Who does what?

In what order?

With what information?

## SECTION 8 — COMMITMENT

One thing I will design before adding more leads:

# Manager Handoff: Pressure-Test the Leak

This section is designed to be completed by your manager after you've identified the primary leak above.

**The goal is not agreement — it's clarity.**

This creates a shared picture of where breakdowns are actually occurring before changes are made.

## MANAGER INSTRUCTIONS

Review the owner's identified primary leak.

Answer the questions below based on what you see day-to-day in the operation — not what should be happening.

1. From your seat, where does this breakdown actually show up most often?

*Examples: follow-up timing, quote accuracy, handoffs, install scheduling, customer expectations, rep confidence*

2. What behavior do you see repeatedly when this issue occurs?

*Be specific — what happens right before things go sideways?*

3. What constraint are you personally working around because of this issue?

*Time, people, information, authority, tools, approvals*

4. If we fixed only one step in this process, which step would remove the most friction immediately?

## ALIGNMENT CHECK

Circle one:

☐ We are aligned on the root issue

☐ We are partially aligned

☐ We are not aligned yet

If not aligned, briefly note where perspectives differ:

### NEXT STEP (OWNER + MANAGER):

Choose one design change to test over the next 30 days.

This is not a full overhaul.

It is a targeted adjustment meant to reduce friction, callbacks, or leakage — fast.

*Optional next step: After completing this yourself, consider having your manager complete the same exercise independently. The value isn't agreement — it's seeing where your views differ. Those gaps often reveal the real leverage.*

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