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.

	Always	Sometimes	Rarely
1. New leads receive a clear explanation of what happens next.	☐	☐	☐
2. Follow-up happens quickly and consistently.	☐	☐	☐
3. Customers arrive knowing roughly what to expect on price and timeline.	☐	☐	☐
4. Different team members describe the process the same way.	☐	☐	☐
5. Salespeople sound confident before the appointment begins.	☐	☐	☐

> If "Sometimes" or "Rarely" appears more than once → **circle this section header.**

SECTION 2 — SALES PROCESS

(At the table)

	Always	Sometimes	Rarely
1. Appointments follow a consistent sequence.	☐	☐	☐
2. Customers are guided toward a decision — not left to "think about it."	☐	☐	☐
3. Management can tell where deals stall.	☐	☐	☐
4. Quotes reflect a consistent value story.	☐	☐	☐
5. Close rate does not depend on one standout salesperson.	☐	☐	☐

> If "Sometimes" or "Rarely" appears more than once → **circle this section header.**

SECTION 3 — EXECUTION & HANDOFFS

(After the sale)

	Always	Sometimes	Rarely
1. Handoffs between departments are clearly defined.	☐	☐	☐
2. Installers receive complete, consistent information.	☐	☐	☐
3. Exceptions require intentional approval.	☐	☐	☐
4. Labor overruns are the exception, not the norm.	☐	☐	☐
5. Callbacks and claims are declining or stable.	☐	☐	☐

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?

_____

_____

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

_____

_____

What decision currently feels too easy to make under pressure?

_____

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:

You don't fix profit by working harder. You fix it by designing better guardrails.

Created by Matt Shelton

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