

# THE OWNER BLUEPRINT

## Where Opportunity Leaks — and How to Find the First Fix

*A diagnostic lens for owners who want fewer surprises and better conversion.*

**This is not a to-do list.** This is a diagnostic lens to identify where profit and confidence are leaking after the lead arrives. You do not fix all of this at once. You identify one pressure point and design around it.

### STEP 1 — LEAD EFFECTIVENESS

(Before the salesperson ever sits down)

- ☐ Can a new customer clearly explain what happens next after first contact?
- ☐ Do all leads receive a human follow-up within 24 hours — not just an automated email?
- ☐ Would two different salespeople describe the next step the same way?
- ☐ Are expectations about timeline, pricing range, and install process set before the showroom visit?
- ☐ Does your team sound confident and consistent — or helpful but unsure?

**RED FLAG:** *If salespeople are spending the first 15 minutes resetting expectations, the lead already started uphill.*

### STEP 2 — REPLICABLE SALES PROCESS

(What happens at the table)

- ☐ Do salespeople run appointments in the same order, or does everyone "do their own thing"?
- ☐ Is there a defined decision path from interest to commitment?
- ☐ Can management identify where deals stall — or does everything show up as "undecided"?
- ☐ Do customers leave knowing: what they chose, why they chose it, what happens next — or do they leave feeling like they still need to "think about it"?

**RED FLAG:** *When your best rep performs well and everyone else looks lazy, the problem is usually design — not motivation.*

### STEP 3 — EXECUTION & HANDOFFS

(Where profit quietly leaks)

- ☐ Are handoffs between sales, measure, office, and install clearly defined?
- ☐ Do installers receive the same information every time?
- ☐ Are there clear rules for: labor upgrades, crew selection, change orders, exception approvals — or do people default to "whatever gets it done fastest"?

**RED FLAG:** *If someone can say yes without friction — especially under pressure — profit is leaking.*

### STEP 4 — VISIBILITY & CONTROL

(What owners don't see until it's too late)

- ☐ Can you quickly see which quotes are active, stalled, or at risk?
- ☐ Do you know where margin erosion is happening before it hits the P&L?
- ☐ When something goes wrong, can you trace it to a process gap?
- ☐ Are callbacks and claims tracked as signals — or treated as one-off annoyances?

**RED FLAG:** *If surprises show up on financials instead of dashboards, visibility is broken.*

## STEP 5 — THE DESIGN QUESTION

Do people succeed because:

- ☐ they're talented?
- ☐ they care?
- ☐ they work harder?

**Or because the system makes the right decision easier than the wrong one?**

*"If your business only runs smoothly when the right person is present, nothing unusual happens, or you step in to save the day — then you are still the system."*

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### HOW TO USE THIS

- ☐ Do not fix everything
- ☐ Circle the section that made you most uncomfortable
- ☐ Identify one rule, guardrail, or sequence to design
- ☐ Add intentional friction where bad decisions currently feel easy
- ☐ Let the system do the policing — not you

### WHAT THIS IS NOT

- × Not a script
- × Not software
- × Not a motivation problem
- × Not "work harder"

**This is design.**

**"Most owners don't need more leads.  
They need fewer leaks — and clearer guardrails."**

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