

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?

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:

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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