COMPANION FIELD GUIDE

THE VERTICAL

Worksheets and practice specifications for the CLARITY sequence, training, the scorecard and the first ninety days.

Michael Delguyd

Use it with the book. The Vertical: The Operator’s Playbook for Building Leaders, Stronger Companies, and Lasting Value.

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The scripts, settings and figures here come from the book and from my own experience. They are not independently audited results, and no result is promised. The examples come from basement waterproofing because that is where I built the method. Confirm what your trade, your licenses, your lenders and your review platforms require before you use any of it. The history and credit behind the method are in the book’s Note on Sources and Credit.

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How to use this guide

START HERE

The book teaches the decisions. This guide gives your team a place to record the work.

Print the page you need. Fill it in with a pen. Keep it where the next person can find it in ten seconds.

Four things to know

1. Chapter numbers point back to the book. Read the chapter, then run the page.
2. The scripts are the words from the book. Train them out loud, one part at a time.
3. My numbers are my settings. Seventy-eight. Fifteen. One hundred fifty-five thousand. They are not industry laws. Fill the worksheet from your own operation before you borrow one of them.
4. The examples come from waterproofing. Replace the signs, the stages and the three options with what is true in your trade.

The pages most teams start with

- ☐ The sixteen steps on one page. Part One.
- ☐ The appointment observation sheet. Part One.
- ☐ The scorecard definitions. Part Three.
- ☐ The four assets on one page. Part Four.

One rule sits over every page

Run it honestly. Tell people when they can wait. Tell people when the cheap fix is fine. A specialist does not invent urgency. He describes the house.

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PART ONE

THE CLARITY SEQUENCE

The appointment in order, the words that matter, and the sheets for training and inspecting it. From Chapters 7 through 12.

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The sixteen steps on one page

CHAPTER 9. CLARITY IN ORDER

#	STEP	ITS JOB
1	The call ahead	Arrive expected. No agenda yet.
2	The door and the agenda	Lower the guard. Replace fear with a clear plan.
3	The questionnaire	Learn what they have seen, tried and want. Listen.
4	The signs of water	Give them a shared language for evidence.
5	The inspection	Ask. Inspect. Snap. She comes with you.
6	The break	Leave the house. Build the report from their house.
7	Reset the table	Both homeowners back. Reports within reach.
8	The company story	Open with a question. Tell why the company exists.
9	The heat map	Show completed work in rings around this house.
10	The Build	Draw how water moves. Ask. Let them answer.
11	The stages of progression	Find out what landed. Correct up or down.
12	What happens in general	Show the direction, labeled as examples.
13	Their home, with validation	Their close-up photos beside a named source.
14	Agreement and permission	Agree there is an issue. Ask to show solutions.
15	Solutions	No, no, yes. Tied to what they identified.
16	The price presentation	One-year quote, real incentives, the Flex.

Keep these transitions intact

- ☐ Company story, then heat map.
- ☐ General progression, then their own photographs and supporting material.
- ☐ Agreement, permission, solutions, price.

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Audit. Diagnose. Educate. Prescribe.

CHAPTER 7. THE HOME HEALTH SPECIALIST

Four words, in that order. The order is the method.

STEP	WHAT IT MEANS
Audit	A real inspection with evidence. Photographs, video, readings, measurements. Give it the time the house requires.
Diagnose	Root cause, not symptom. Why is it happening, and where does it start?
Educate	Teach her how her house works, in plain words, with her own photographs on the table.
Prescribe	Only now. A treatment plan for the things you both just looked at.

The four ways it breaks

- ☐ He prescribed before he diagnosed. He had the answer in the truck.
- ☐ He audited and never diagnosed. Evidence with no meaning attached.
- ☐ He diagnosed and never educated. She had to take his word for it.
- ☐ He prescribed something that did not match the diagnosis.

Three ways to train and inspect it

1. Change what you score. Finding the customer's reason and the inspection sit together as one heavy category.
2. Time the two phases. Minutes inspecting and educating. Minutes presenting. Then talk about the ratio.
3. Build the diagnostic knowledge on purpose. Interview your service techs and your two most senior installers about the failure modes.

The warning. This frame is not a costume. Tell people when they can wait, when the cheap fix is fine, and when the problem is not yours to solve.

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Steps one through four

CHAPTER 9. THE WORDS AND THE CHECKS

Step one. The call ahead

Call ahead. Identify yourself. Give a precise arrival time. The call has one job: arrive expected. The agenda does not belong here.

Step two. The door, the smile and the agenda

Before you walk up, think of the fun friend you have not seen in two years. Knock, and give the homeowner that smile. Then compliment something real, visible and in the moment. Never manufacture it.

Then give the agenda.

> *The first thing we are going to do is head to a table. I am going to ask you a few questions, and that will speed things up. Then we will head downstairs and I will do a thorough inspection to find out exactly what is going on, if anything at all. If I find something I can help with, I will head out to my vehicle and build you a report. I will come back in, we will go through it together and, if it makes sense, we will look at solutions. Then I will give you a price, and that price will be good for a full year.*

- ☐ He said the five words: that will speed things up.
- ☐ He said the price will be good for a full year.

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Step three. The questionnaire

Fill out the form while they answer. Listen. If you are doing all the talking, you are collecting your own assumptions.

- ☐ How old is the home? How long have you lived here?
- ☐ What have you noticed? When did you first notice it?
- ☐ What have you already tried? Who has advised you?
- ☐ Is anybody else helping you make this decision?
- ☐ What are you trying to accomplish by fixing it?
- ☐ Do you want this dry some of the time, or dry all of the time?
- ☐ What do you want to use the space for?

A checked box is not a diagnosis. Each answer gives you something to investigate.

Step four. The signs of water

Show what counts as a sign before you inspect. White salt deposits on masonry, peeling coatings, staining, dampness, visible water, deteriorated wood.

The response you want is, “I have seen that.” Describe, reassure, then inspect. Do not diagnose the basement from the kitchen table.

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Steps five through nine

CHAPTER 9. THE WORDS AND THE CHECKS

Step five. The inspection

Ask. Inspect. Snap.

Ask about what you are standing in front of.

> *How long has that been like that?*

Inspect the exact condition you just discussed. Then take a clear close-up photograph of it.

- ☐ The homeowner came along for the whole inspection.
- ☐ Every finding has a close-up photograph.
- ☐ The inspection got the time the house required.

Step six. The break

Leave the house and build the report. Organize the findings, match them to the supporting material, and set the order you will teach it back. The homeowners get room to talk privately.

Step seven. Reset the table

- ☐ Both homeowners are back at the table. If one stepped away, wait.
- ☐ The reports sit far enough away that they have to reach.

A reach is a sign of interest. It is a cue to pay attention, not proof they are ready to buy.

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Step eight. The company story

Open with a question, not a speech.

Okay. What do you know about us?

Listen. Then lean forward slightly.

You're really going to appreciate this.

Tell the story as the reason the company exists, how it learned to solve this problem and why its way of doing the work is different. Not dates, awards and numbers.

Step nine. The heat map

Straight after the story. Show where her house sits and the completed work around it, in rings of one, three and five miles. Then let her take it in.

- ☐ The map is labeled with the period it covers.
- ☐ It says what each mark represents.
- ☐ It uses only information the company is authorized to share.
- ☐ It is current.

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Steps ten through thirteen

CHAPTER 9. THE WORDS AND THE CHECKS

Step ten. The Build

Draw the house with its sides, the water source, the paths available to it and the conditions you found. Then ask.

> *If we repair only this side, and water follows the path of least resistance, what happens next?*

Do not answer for them. Connect their answer to the entry paths you actually found. If they cannot explain the mechanism, go back to where the explanation stopped landing.

Step eleven. The stages of progression

These four stages are my field teaching framework for a block foundation. Write the stages for your own trade on the next page.

1. The small exterior crack.
2. Moisture in the block and early dampness.
3. Efflorescence and widespread moisture indications.
4. Visible water entry and damage.

> *Based on what we saw downstairs, which stage do you believe your home is in?*

You are measuring understanding. If they say four and the findings support three, bring it back.

> *No, we are not quite there yet. You are still in stage three. Let me show you the difference.*

Step twelve. What happens in general

Show images that resemble what you found, one or two stages farther along. Say plainly that they are examples of more advanced conditions. They are not photographs of this house and not a prediction.

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Step thirteen. Their home and third-party validation

- ☐ Tight close-up photographs from this inspection, shown large on the screen.
- ☐ Each one paired with material from an identified independent source.
- ☐ The source language read word for word, with almost no emotion.
- ☐ No claim that a published explanation inspected this house.

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Your stages of progression

CHAPTER 9. STEP ELEVEN, FOR YOUR TRADE

Write the pattern you teach in your own category. Four stages is my number. Use what is true for your product.

Product line _____

STAGE	WHAT THE HOMEOWNER CAN SEE	WHAT IT DOES NOT PROVE BY ITSELF
1		
2		
3		
4		

The question, in your words

The correction, in your words, when they guess too high

Independent sources for step thirteen

SOURCE	WHAT IT SUPPORTS

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Steps fourteen through sixteen

CHAPTER 9. THE WORDS AND THE CHECKS

Step fourteen. Agreement and permission

Mary, it is clear that there is an issue here. Would you agree?

Once she agrees:

So it is not really a question of whether this gets fixed. It is when you are going to fix it and who you are going to trust to do it. Is that fair?

Then ask permission.

Would you like me to walk you through the solutions?

Step fifteen. Solutions

Only after permission. The options must be real, accurately described and suitable for this house. This is where the install standard becomes concrete: what arrives, what gets protected, how the work is performed, what she receives at completion.

Step sixteen. The price presentation

Keep three things clear.

1. The written quote is good for a full year. It stands.
2. The incentives you are actually running, with their conditions. They do not erase the one-year quote.
3. The Flex is a trade. Say what the company receives and what she receives.

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Button up the decision

- ☐ Scope confirmed.
- ☐ Payment arrangements confirmed.
- ☐ Schedule expectations confirmed.
- ☐ Everything the crew needs to know is written down.
- ☐ Job packet complete: signed documents, order details, wider site photographs.
- ☐ Nothing promised at the table will surprise the install team.

Before you leave, ask:

What made you decide to go with us?

Her words _____

_____

_____

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Sequence drill log

CHAPTER 9. TRAIN THE SEQUENCE

Drill one part at a time, out loud. Teach why it belongs there. Then connect it to the next part.

Rep _____

Manager _____

#	STEP	SAID IT OUT LOUD	EXPLAINED WHY	TIED TO NEXT	DATE
1	Call ahead				
2	Door and agenda				
3	Questionnaire				
4	Signs				
5	Inspection				
6	Break				
7	Reset the table				
8	Company story				
9	Heat map				
10	The Build				
11	Stages				
12	In general				
13	Their home				
14	Agreement				
15	Solutions				
16	Price				

A rep who knows the words but cannot explain the order will rearrange it under pressure.

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Appointment observation sheet

CHAPTERS 7 AND 9. FOR THE MANAGER IN THE ROOM

Rep and manager _____

Date and lead source _____

Time the two phases

Minutes inspecting and educating _____

Minutes presenting _____

Steps run, in order

- ☐ 1 Call ahead
- ☐ 2 Door and agenda
- ☐ 3 Questionnaire
- ☐ 4 Signs
- ☐ 5 Inspection
- ☐ 6 Break
- ☐ 7 Reset the table
- ☐ 8 Company story
- ☐ 9 Heat map
- ☐ 10 The Build
- ☐ 11 Stages
- ☐ 12 In general
- ☐ 13 Their home
- ☐ 14 Agreement and permission
- ☐ 15 Solutions
- ☐ 16 Price

Step skipped or out of order _____

The homeowner’s exact words worth keeping

_____

_____

The one lever for this rep

_____

Date I will watch it again _____

Write measurements and quotes on this sheet. Save the interpretation for the conversation.

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Your three options

CHAPTER 10. THE OFFER

No. No. Yes. In that order, out of her mouth. All three options must be real.

Product line _____

Option one. The disruption anchor

The most complete, most invasive version. Anchor on the disruption, not the price.

What it is _____

How many days _____

Where the equipment sits _____

Is the driveway usable? Can they be in the house? _____

What gets cut, dug, removed or relocated _____

What the noise is like _____

Your verdict question, word for word. Mine has the shape of, honestly, how does that land with you.

_____

_____

Option two. Cheap, with a consequence

The cheapest way to address it. The consequence has to be true and specific.

What it is _____

What it looks like in three to five years _____

What has to come back out _____

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Why the second time costs more _____

Your elimination question, built from her own standard in step three. Mine: this one gets you dry some of the time. You told me you wanted dry all of the time. Is that going to do it for you?

Option three. The destination

The middle price. It costs more than the market's average because of how it gets installed.

Name the specific steps the cheaper version skips.

- ☐ We ran it out loud with the managers until it sounded like a conversation.
- ☐ We allowed for a learning period and watched the execution.

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Before and after the number

CHAPTER 10. THE OFFER

Isolate price before any option comes out

Before I show you the number, is there any reason besides price or payment that you would not get started today?

Stop. Wait for an actual answer. Then:

Would you do me a personal favor and keep an open mind to a fair business proposition?

If she names something that is not price, handle it right then.

Handle. Confirm. Re-isolate. Then the number.

With that taken care of, is there anything besides price?

When the number comes out: no hesitation, no flinch, no explaining. Then nothing at all.

After she has heard it

What is your opinion of the price?

MOVE	WHAT YOU DO
Add	Put everything already in the number back on the table, out loud.
Subtract	If the number comes down, something comes out. Show her what.
Multiply	Make the things that are not on the invoice bigger. The reasons she is buying.
Divide	The real price over a service life you can support. Once, calmly. Never as a financing payment.

Three numbers

What she hoped it would be _____

What she expected it would be _____

What she thinks most people pay _____

Ask what those numbers are based on before you decide what they mean.

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The earned discount

CHAPTER 10. THE OFFER

Every concession needs an authorized reason and clear terms. Work out what each trade is worth before you offer anything for it.

WHAT SHE GIVES	WHAT IT IS WORTH TO US	CONCESSION AUTHORIZED
Permission to use before-and-after photographs		
A yard sign for two weeks		
Real flexibility on the schedule		

- ☐ The exact terms are agreed and recorded.
- ☐ The written one-year price still means what it says.
- ☐ No invented deadline.
- ☐ A review is never part of the trade. No payment, discount or reward for posting.

Incentives we are actually running

INCENTIVE	STATED CONDITIONS	ENDS

The price guess, when you can honor it

Write the price down before the guess. Turn the paper over. Pen down. Guess within five hundred dollars and five hundred comes off. The written number cannot move after the guess. If she would rather not play, move on.

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The Flex. Run order

CHAPTER 11. THE FLEX

A better price for scheduling flexibility. It comes last.

1. Ask about her calendar.
   When are you planning on making a decision on this? … Okay. That soon?
2. Two tie-downs.
   If there was any other way I could save you money on this, you would want to know about it, right?
   You would probably be upset with me if I didn't offer it to you.
3. Explain it as a thing you do, inside a system. Your regions. Your real number of flexible people per cycle.
4. Give permission to decline. Three or four times.
   If this doesn't work for you, it's not a problem. Just let me know.
5. Write it out. Today on the left. Her no-later-than date on the right. The jobs already lined up in between.
   If you never hear from us again, we're in your driveway between eight thirty and nine thirty on the first of October.
6. Hand her your problem. A customer cancels and leaves a hole. Let her pick the answer.
7. The tomorrow test, then the three qualifying questions.
   So you're good if we call you tomorrow?
8. Set the terms before you dial. A yes or a no.
   If it is available, I need either a yes or a no. I promise you, I'll take a no as easily as I'll take a yes.
   The only thing I can't take is that we have to think about it. Because remember, even if we called you tomorrow, you'd have to be okay with that.
9. Call the install manager in front of her, on speaker. Full name. Say who is listening. Say the deposit amount. If the slot is gone, she hears the no.

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The Flex. Qualification sheet

CHAPTER 11. FILL IT IN AT THE TABLE

Customer and rep _____

No-later-than install date _____

The tomorrow test

☐ Yes, tomorrow works ☐ No

Three questions. Ask them one at a time and write the answers

Is 24 to 48 hours notice enough to be ready? _____

Can you have five feet cleared from the wall? _____

Can we use the back door or the garage door? _____

Those three are mine, for waterproofing. Write the constraints that cost your own crew a morning.

If she is not home, who can meet the crew? _____

Who it does not fit

☐ A hard date the Flex terms cannot protect.

☐ Shift work, and she needs to be in the house.

☐ A real seasonal constraint.

The call and the paperwork

☐ Called in front of the customer, on speaker. Full name given.

☐ Deposit amount said out loud. Opening confirmed.

☐ In writing: 24 to 48 hours notice, and the no-later-than date.

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The Flex. Size the pool

CHAPTER 11. THE FOUR DISCIPLINES

Count your dead crew days over a quarter. That is your hole rate. Build the pool to cover it with a little margin. Then stop offering it.

Quarter _____

REGION	DEAD CREW DAYS	POOL SIZE	FLEX JOBS SOLD	PULLED FORWARD

Does the trade work for us?

Contribution recovered on those days _____

Concessions given _____

Administration cost _____

Net _____

The four disciplines

- ☐ The right is in the paperwork, with the no-later-than date.
- ☐ We actually use it. The coordinator pulls from the pool most weeks.
- ☐ The scarcity is real. Our actual number per region per cycle is _____.
- ☐ The pool is sized to the holes.

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LARIC on one page

CHAPTER 12. LARIC

Five letters, five steps, same order every time.

STEP	DO THIS	HOW IT FAILS
Listen	Completely. Let her finish. Leave a beat of silence.	Defending inside the objection. “Well, actually.”
Accept	One short sentence that says the concern makes sense. Then stop.	Acceptance with a but on the end.
Repeat	Say it back as a clear question.	Repeating it as a statement.
Isolate	Find out whether this is the only thing. Name the categories.	A vague “is there anything else?”
Close	Address the isolated concern with something specific. Then ask.	Solving and not asking.

Five rules over all of it

1. When she pushes, lower your energy. Slow down. Soften the voice.
2. Pre-close before the price, not after.
3. The order of arrival is predictable. Spouse and estimates early, price at the number, timing last. Train them in that order.
4. Never use a line you do not believe.
5. After three genuine attempts on a genuinely isolated objection, take the no properly. Thank her, leave the plan, leave the door open.

Only say a price increase is coming if a price increase is actually coming.

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The five you will hear this week

CHAPTER 12. THE LANGUAGE

One. “We need to get a few more estimates.”

Accept. *I completely understand. Getting a few quotes is smart. If I were in your shoes I would want to be thorough too.*

Repeat. *So right now you feel like you need to see a few more estimates before you make a final decision?*

Isolate. *Other than getting a couple more quotes, is there anything about the product, the scope of the work, or the install process that you are not one hundred percent comfortable with?*

Close. *Then let’s do this. Let me show you exactly what those other quotes will and will not include, so you are comparing the same scope, the same materials and the same protection. If we get you identical work at a number that fits, is there any reason we could not lock in your install date today?*

Two. “We need to think about it.”

Accept. *No problem at all. This is a big decision and you should not rush into it.*

Repeat. *So you just need a little more time to process everything we went through today?*

Isolate. *Just so I am clear, when you say you want to think about it, is it the product itself, the way we install it, or is it strictly how the payment fits into the monthly budget?*

Close. *Since we are both sitting right here, tell me which part is giving you pause and let’s work through it together before I leave.*

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Three. “The price is higher than we expected.”

Accept. *I appreciate you telling me that. This is a significant investment and nobody wants to feel like they overpaid.*

Repeat. *So the main thing holding us up is that the total came in higher than what you had in your head?*

Isolate. *If the number were right where you needed it to be, would you feel good about having us do the work, or is there another concern underneath it?*

Close. *Then let’s look at the two things we can actually move. We can adjust the scope, which changes what we do. Or we can change how it is structured so the monthly commitment fits comfortably. Which of those do you want to look at first?*

Four. “I need to talk to my wife.” Or my husband, or my son.

Accept. *That makes sense. You both live here and you both manage the money, so you should be on the same page.*

Repeat. *So you want to make sure he has a chance to look at the plan before you commit to anything?*

Isolate. *Assuming he likes the design, the product and the warranty, is there anything on your end that would keep us from getting started?*

Close. *Two ways we can handle it. We can get him on the phone for three minutes right now, or I can leave the whole diagnostic package with you, get it scheduled conditionally, and you confirm with him tonight.*

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Five. “We are going to wait until next year.”

Accept. *I get it. Pushing a project down the road always feels like the easiest option in the moment.*

Repeat. *So you would rather hold off another six to twelve months?*

Isolate. *Other than the timing, is there anything about the setup itself, or is it strictly a question of when the work gets done?*

Close. *If it is purely timing, we can handle that. We can lock the scope and the pricing now and schedule the install for when you actually want it, so the waiting does not cost you anything.*

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LARIC training plan

CHAPTER 12. HOW TO TRAIN IT

Not in a meeting. Out loud, in a room, badly at first. One objection per week. A manager plays the homeowner.

Rep _____

WEEK	OBJECTION	ALL FIVE STEPS, NO PROMPT	MANAGER
1	Talk to my spouse		
2	A few more estimates		
3	Think about it		
4	Price is higher than expected		
5	Wait until next year		

The drill that works best

First three steps only. Listen, accept, repeat. Then stop. No isolate, no close. Ten times in a row.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5 ☐ 6 ☐ 7 ☐ 8 ☐ 9 ☐ 10

What to listen for

- ☐ He let her finish and left a beat.
- ☐ The accept was one short sentence, with no but.
- ☐ The repeat ended in a question mark.

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PART TWO

TRAINING SPECIFICATIONS

What to film, where each clip goes, how daily practice is built, and how to check that it reached a house. From Chapters 13 and 18.

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Five kinds of clip

CHAPTER 13. TRAINING THAT TRAVELS

Keep the audience clear. A rep learning a behavior and a homeowner learning about a condition need different material.

CLIP	FOR	ITS JOB
Why-behind	The rep	Explains why one step exists. Sixty to ninety seconds is usually enough.
Behavior	The rep	Shows the weak version and the strong version. Thirty to sixty seconds. Eyes, the wait after a question, the response to an interruption.
Roleplay	The rep	A whole step at a real table. It can run longer. Reference and onboarding. A branching version starts teaching judgment.
Mechanism	The homeowner	Explains one thing. How water moves, what a failure looks like, how a repair works. Sixty to ninety seconds. No price, no offer, no pitch. If you produced it, say so.
Customer asset	The homeowner	Before-and-after photographs and an account of about thirty seconds from a completed job, used with permission. Never a claim about every job.

Name every clip for the step and the job

A person on a phone should find the right piece in ten seconds. Never name a clip for the date you shot it.

Inspection: why we bring the homeowner.

Solutions: the elimination question.

You do not need a budget

A phone. A room you make look like a studio. Real people demonstrating the work.

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Where each clip goes

CHAPTER 13. THE PLACEMENTS

The rule in the house: show only what helps the homeowner understand the next decision.

STEP	WHAT MAY BE SHOWN, AND THE RULE
4. The signs of water	A signs clip that introduces what you are about to inspect. Describe and reassure. No diagnosis yet.
9. The heat map	The job map. Label the period and what each mark represents.
10. The Build	A mechanism clip can support the drawing. The homeowner still explains it back.
12. In general	Images one or two stages farther along. Say they are examples, not this house.
13. Their home	Their close-up photographs beside material from an identified independent source. Read it word for word.
15. Solutions	Installation footage. A customer's before-and-after photographs and short account, introduced as that customer's own experience.

These stay on the training side

- ☐ Greeting clips.
- ☐ Delivery and presence clips.
- ☐ Objection handling clips.
- ☐ Every why-behind, behavior and roleplay clip.

Say what each thing is

- ☐ Company footage is company teaching. It is not an independent source.
- ☐ A job map shows local experience.
- ☐ Customer feedback describes one completed job.
- ☐ None of them is an independent professional inspection.

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Clip library index

CHAPTER 13. NAME AND FILE BY STEP AND JOB

NAME. STEP, THEN JOB	KIND	LENGTH	WHERE IT LIVES

- [ ] A rep who started last month can find each one in ten seconds.
- [ ] Each one sits where the rep already works.

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Start with the losses

CHAPTER 13. YOUR FIRST BUILD LIST

Take the last three months of lost appointments. Find the recurring gaps in understanding.

Period and number of lost appointments reviewed _____

Three recurring gaps, and the short piece that addresses each

#	THE GAP	THE PIECE	OWNER
1			
2			
3			

Behaviors our managers already coach. Film these next

_____

_____

The weakest step. One full roleplay

Step, and who plays each part _____

- ☐ Everything is named and filed by the step and the job.
- ☐ Daily practice is assigned.
- ☐ A manager checks it in the field.

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Five reps a day. The specification

CHAPTER 13. THE ENGINE

Five rules

1. It comes to the rep.
2. Five repetitions a day.
3. The next repetition addresses a weak area.
4. A miss returns until it is closed.
5. The rep can show what he completed.

Weakest first does not mean weakest only. Let stronger areas come back and let new areas open.

Five kinds of practice

REP	WHAT THE REP DOES
Recall	Answers a question before checking it.
Quick check	Chooses an answer and sees the correction.
Say it out loud	Practices the actual sentence, its delivery and the reason it works.
Roleplay	Responds to a homeowner and sees what the choice does to the conversation.
Objection drill	Works through Listen, Accept, Repeat, Isolate and Close, one beat at a time.

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The design settings

These are settings in my tool. They are not laws of learning. Their value is that the expectation is visible and consistent.

SETTING	MINE	YOURS
Repetitions a day	Five	
Delay before an out-loud rep can be marked done	Six seconds	
Listening drill	Interrupt or wait	
Roleplay choices	Strong, adequate and miss	
Returning misses in one day	No more than two	
Knowledge gate	Ten questions, nine correct	
Before a gate attempt	Twelve repetitions in the area	
After a missed gate	Five more repetitions, then retry	
Streak	One save per week	

The question at the end of every session

How will you use this on your next appointment?

One line, his words. Bring it back the next time he practices the area. Still true, or does it need to change?

What the record proves

- ☐ A passed gate tells you how he answered those questions.
- ☐ It does not prove he can listen, diagnose and deliver in a house.
- ☐ Training days, repetitions and passed areas give a manager something to discuss.
- ☐ They do not replace observed performance or the scorecard.

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Daily practice log

CHAPTER 13. A MANAGER, A PHONE AND A SHARED SCHEDULE

You can begin on paper. Five short repetitions, a few minutes before an appointment.

Rep _____

Week of _____

Weakest area this week _____

DAY	AREA PRACTICED	FIVE DONE	SAID OUT LOUD TO	MISS TO BRING BACK
Mon				
Tue				
Wed				
Thu				
Fri				
Sat				

How will you use this on your next appointment?

Next week. Still true, or does it need to change?

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Knowledge gate and field check

CHAPTERS 13 AND 16. KNOWLEDGE IS NOT BEHAVIOR

A passed check tells you what to watch next. Then go watch it.

Rep _____

AREA	GATE DATE	SCORE OF 10	WATCHED IN A HOUSE	WATCHED BY

Also observe

- ☐ A realistic quote exercise with the tools the job requires. Watch how he reads, tries, recovers and asks for help.
- ☐ Paperwork. Show him the actual errors and what correct work looks like.
- ☐ Whether he can use the knowledge while a homeowner interrupts or disagrees.

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Seven-day onboarding plan

CHAPTER 18. ONBOARDING SETS THE PATTERN

Seven days that connect the sales sequence, CLARITY, LARIC, practice, ride-alongs and homework that gets checked. Give every teaching obligation an owner. The first week cannot depend on who happens to be available.

Trainee _____

Start date _____

DAY	WHAT IS TAUGHT	OWNER	TAUGHT IT BACK	HOMEWORK CHECKED
1				
2				
3				
4				
5				
6				
7				

For each piece, three passes

- ☐ He explained it.
- ☐ He did it.
- ☐ He did it with somebody responding.

Ride-alongs scheduled with _____

Nodding through a clear explanation is not the same as running it in a house on Thursday.

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The path after the first week

CHAPTER 17. BUILD THE PEOPLE THE MARKET CANNOT HAND YOU

Write the path from the first week to demonstrated competence, then from competence to responsibility. Put a name beside each teaching obligation.

STAGE	WHAT HE MUST DEMONSTRATE	WHO TEACHES IT
First week		
Competence		
Responsibility		

What we measure

Time to competence _____

Work performed correctly _____

Retention _____

People ready to take the next seat _____

The management track

Two requirements run at the same time.

Metrics he has to hold _____

Coursework _____

Checkpoints and dates _____

A timeline creates checkpoints. It does not make somebody ready by itself.

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The reset

CHAPTER 18. BEFORE THE NEXT DOOR

Say it out loud before you leave for the next appointment.

The last one did not close.

That is the math.

This next one might.

Make a friend.

Find out what they want.

Solve it.

The loss still gets reviewed. Right now the job is to arrive ready for the person who has not met you yet.

Practice the reset on a good day so the words are there on a bad one.

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PART THREE

SCORECARD DEFINITIONS

The numbers written down, the rules of the report, and the worksheet for setting your own standard. From Chapters 16 and 18.

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The definitions

CHAPTER 16. MEASURE WHAT YOU MEAN

The moment two managers compute slug rate differently, you have two companies. Write the definitions down and keep them where everybody can find them in ten seconds.

MEASURE	DEFINITION
Lead issued	Every opportunity handed to the rep, whether he sat it or not.
Appointment set	A scheduled opportunity. Not the same as sat.
Appointment sat	The rep got into a demonstration with the homeowner.
Close rate	Sales divided by demonstrations. The most gamed number in the business.
Slug rate	Sales divided by leads issued.
Cancel	A signed job that cancels. Controllable.
Reject	A signed job turned down because the customer cannot pay cash and cannot get approved for financing. Its own line, apart from cancels.
Net	Gross with cancels and rejects both removed. Not installed revenue.
Net slug rate	Net jobs divided by leads issued.
Net average ticket	Dollars of those same net jobs divided by the net jobs.
NSLI	Net sales per lead issued. Net slug rate times net average ticket.
Cancel rate	Cancels divided by jobs signed, for the same group. Rejects are not in it. Scored again as its own line, on purpose.
Reporting gate	Fewer than fifteen issued leads in the period: not scored.

Three groups

Output	What the rep produced.
Shape	The quality of that production. Cancellations, appointments sat, paperwork, whether the jobs hold.
Skill	What the person can demonstrate, including the tools the job requires.

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The arithmetic, worked once

CHAPTER 16. AN EXAMPLE, NOT A COMPANY RESULT

Leads issued	50
Signed jobs	20
Cancels and rejects later	2
Net jobs	18
Net slug rate	18 of 50. 36 percent
Dollars on those 18 jobs	$180,000
Net average ticket	$10,000
NSLI	$3,600

Rules of the report

- ☐ Date the report.
- ☐ Same group, same date range and same cancellation treatment for the job count and the dollars.
- ☐ If another job cancels, update that original group. Do not move the loss into a different group.
- ☐ Never mix a net rate with a gross average.
- ☐ Measurements only. No guesses about why.
- ☐ Fewer than fifteen issued leads: not scored. Not scored poorly. Not scored.
- ☐ The report names the employee, the period, the source records, the definitions and the version of the scoring method.
- ☐ Another authorized person can recompute it.
- ☐ People can question a wrong record and get it corrected.

A report number or verification code helps locate the record. It does not prove the data is true. Keep the path back to the actual jobs.

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Recompute one rep

CHAPTERS 16 AND 21. FROM THE UNDERLYING RECORDS

Check the definitions and the period before you discuss the ranking.

Rep _____

Period _____

Source report and date pulled _____

LINE	FROM THE RECORDS
Leads issued	
Appointments sat	
Signed jobs	
Cancels	
Rejects	
Net jobs	
Net slug rate	
Dollars on the net jobs	
Net average ticket	
NSLI	
Cancel rate	

- ☐ Fifteen or more issued leads in the period.
- ☐ It matches the published report. If not, find the record that differs.

Recomputed by _____

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Calibration worksheet

CHAPTER 16. CALIBRATE THE SCALE, THEN HOLD IT

Fill this from your operation before you assign a final weight or threshold. Borrowing my number without understanding your own economics gives you the appearance of a standard.

1. Your economics

Period _____

What we pay for an issued lead _____

Office NSLI for the period _____

2. The standard. What good is, in numbers

Ask three managers separately. If you get three answers, settle it here.

MEASURE	OFFICE AVERAGE	THE STANDARD	SOURCE
Net slug rate			
Net average ticket			
NSLI			
Appointments sat			
Cancel rate			
Paperwork			
Knowledge gate			
Observed demo			

3. The weights

Production carries the greatest weight in my model because this is a sales job. One observed demo should not overwhelm a longer production record.

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Output, out of 100 _____

Shape, out of 100 _____

Skill, out of 100 _____

4. The floor

My certification floor is seventy-eight out of a hundred. That is my chosen threshold, not an industry law.

Our certification floor _____

5. Test it against real records

Score real people. Does each score match what the work justifies?

REP	LEADS ISSUED	SCORE	DOES IT MATCH THE WORK?

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6. Adjust the expectations, not the floor

When my first version was too aggressive, I adjusted the underlying expectations by about fifteen percent and kept the floor fixed. That is different from moving a score for a favorite employee.

DATE	WHAT CHANGED	WHY, AND WHO IT APPLIES TO

- ☐ The scoring rules are written down.
- ☐ Changes apply to everybody, consistently.
- ☐ Bad data gets corrected openly.
- ☐ Every manager can see how the score works.

Scoring method version and date _____

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One lever per rep

CHAPTER 18. ONE LEVER AND A WINNING CULTURE

One coaching lever per rep, at a time. Not a priority list. One. Urgent safety, honesty or customer problems still get addressed immediately.

Rep _____

Date _____

Everything I can see

_____

_____

_____

Three criteria, in order

Damage. Which costs the most in the next ninety days?

_____

Coachability. Can he change it in a week or two?

_____

Sequence. What is the earliest broken step?

_____

The one lever

_____

The behavior and the date I will watch it _____

What happened _____

Never give somebody a lever he cannot reach. Stay on it until it moves or until you have established that it will not.

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The meeting, in order

CHAPTER 18. ACCOUNTABILITY FIRST

1. Accountability. Who said they would do what, and did it happen. About four minutes.
2. Information.
3. One lever each.

Wins by Name is a standing item in every meeting.

Commitments from last time

WHO	SAID THEY WOULD	DID IT HAPPEN

Wins by Name

A name, the specific action and what it produced. In front of other people.

NAME	THE SPECIFIC ACTION	WHAT IT PRODUCED

New commitments

WHO	WILL DO	BY

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Rankings people can trust

CHAPTER 18. KEEP PERFORMANCE VISIBLE

Reps against reps. Crews against crews.

- ☐ Defined measures, from the definitions in this guide.
- ☐ A stated period.
- ☐ The context needed to make the comparison fair. Lead mix, immature cancellations, small samples.
- ☐ A way to question a wrong record and get it corrected.
- ☐ Nothing in it rewards hiding a difficult appointment.

Where the ranking is published _____

How often _____

Who corrects a wrong record _____

A ranking does not diagnose a problem by itself. It points people toward better work.

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PART FOUR

IMPLEMENTATION WORKSHEETS

The four assets, the install standard, the launch gates, the customer moments, the build standard and the first ninety days. From Parts Two through Five of the book.

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The four assets on one page

CHAPTER 24. OWN THE VERTICAL

Beside each asset, write what exists, what is missing and the next action.

ASSET	WHAT EXISTS	WHAT IS MISSING	NEXT ACTION
A named installation process			
A fair measurement standard			
Designed customer moments			
A trade-specific intelligence layer			

Office and product line _____

Accountable leader _____

Thirty-day review date _____

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What you depend on

CHAPTERS 2 AND 4. DO THIS MONDAY

Mark what you control and what can change without your agreement.

WHAT WE DEPEND ON	WE CONTROL IT	CAN CHANGE WITHOUT US
Product		
Leads		
Financing		
Systems		
People		
Process		

The dependency most likely to hurt us _____

One action that reduces it _____

Owner and date _____

The sequence test

Ask a manager to explain the appointment sequence without your help. Write down where the explanation changes from person to person.

_____

_____

Time booked to fix one gap _____

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Find the moat you already have

CHAPTER 5. BEFORE YOU BUILD IT

What does a bad install of your product look like in year three?

Callbacks from the last two years, sorted by cause

CAUSE	COUNT	THE STEP THAT PREVENTS IT

What our best installer does that is not in the manufacturer’s instructions

Installer and ride date _____

What our service techs see

This is one interview. It feeds the install standard, the rep’s diagnostic knowledge and the intelligence layer.

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The install standard. Six verbs

CHAPTER 5. THE INSTALL MOAT

The selection rule

Is there a version of installing this that is meaningfully better than the standard version, and can I name it, train it and inspect it?

☐ Yes. That is a business. ☐ No. Pass.

1. Name it

The name of our install process _____

2. Standardize it

Every step, in order, with what good looks like.

#	STEP	WHAT GOOD LOOKS LIKE	PHOTO THAT SHOWS IT

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3. Train it

- ☐ To the crews.
- ☐ To the sales team. A rep can walk a homeowner through the install with specifics.

4. Document it

- ☐ Written, with photos of correct and incorrect.

5. Protect it

- ☐ Documentation and ownership arrangements are clear.

6. Have somebody outside certify it

Who. Credentials and license _____

The defined scope he checks _____

Who issues the report _____

Who issues the warranty, what it covers, whether it transfers _____

- ☐ He has no stake in whether the customer bought.
- ☐ The review is priced into the work.
- ☐ The report and the warranty are explained as separate commitments.

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Market scorecard

CHAPTER 6. THE B MARKET RULE

Qualifying means owner occupied, middle income and financeable. All three. Write your thresholds before you fall in love with the market.

Market, and the drive radius we will serve _____

INPUT	THIS MARKET	OUR THRESHOLD	READS
Qualifying households			
Owner occupancy rate			
Median household income band			
Median year built			
Household density per square mile			
Competitor saturation			
Drive time from our install base			

My setting on qualifying households, for a full office launch

Green	About 155,000.
Caution	Within ten percent below. Roughly 140,000 and up. It needs something else to be exceptional.
No	Below that band.

If the market looks crowded

- ☐ We looked at what the competitors are actually doing. Quality, not count.
- ☐ We checked whether it is wide open one product line over.

Decision _____

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The kill criteria

CHAPTER 6. WRITE THEM FIRST

Write the conditions under which you will shut it down. Before the lease, before the hire, before the first dollar of media.

Launch, and the date this was written _____

- ☐ Numeric. A threshold, not a description.
- ☐ Dated.
- ☐ Binary. Above or below, with no interpretation step.
- ☐ Written where somebody other than me can see it.

BY	CRITERION	OUR NUMBER
Day 30	A licensed and staffed install capability that can handle the volume we are selling. If not, we stop selling.	
Day 45	Net slug rate on issued leads at or above the floor.	
Day 60	Cost per sale at or below the ceiling. If above, no more media until we investigate.	
Day 90	Cancel rate at or below the ceiling, on jobs sold in the first sixty days.	
Day 90	A minimum number of reps retained and producing.	
Any time	Two consecutive pay periods without paying a crew or a rep correctly and on time. We stop selling until it is fixed.	

Copies held by _____

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The ninety-day gate board

CHAPTER 6. TARGET, ACTUAL AND A CLOCK

When a date passes without the gate being cleared, it locks. The only next action is a shutdown decision or a documented, dated exception signed by somebody other than the person running it.

GATE OR LEADING INDICATOR	TARGET	ACTUAL	DATE	CLEARED

Exceptions

GATE AND REASON	DATE	SIGNED BY, NOT THE OPERATOR

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Stress test the plan

CHAPTER 6. THREE COLUMNS, HAIRCUTS FIXED IN ADVANCE

	DOWNSIDE	BASE	UPSIDE
Margin	About 70 percent of base	What I actually think happens	Up about 20 percent
Density	Down 10 percent		Up 5 percent
Revenue			
Margin dollars			
Qualifying households reachable			
Cash at the lowest point			

The launch is approved only if the downside survives

- ☐ Payroll is met.
- ☐ Install does not stop.
- ☐ No cash comes out of a healthy market to keep this one alive.

Before the Launch Playbook, four questions

Which market _____

Which capacity _____

Which cash floor _____

Which stop conditions _____

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Spike the job

CHAPTER 14. CLOSE THE GAP BETWEEN PAYMENT AND VALUE

Within days of the sale, install something small, fast and real.

Product line _____

What is small, cheap and fast, and delivers part of what she bought _____

_____

_____

Who installs it, and within how many hours _____

- ☐ It has a useful, explained purpose inside the agreed scope.
- ☐ We only claim a measurable change when we measured it.
- ☐ If the simpler measure solves the real problem, we reassess the rest with the homeowner.

The visit. Send your sharpest communicator

- ☐ Audit the job scope against what was sold, on site, against the paperwork.
- ☐ Clear the warranty questions and the physical obstacles nobody documented.
- ☐ Confirm payment arrangements and availability in person.
- ☐ Keep a direct line open to the sales rep.
- ☐ Take responsibility for what happens next.

The reassurance text

When the crew is assigned, an automatic text goes out with the crew lead’s name and photograph. It asks for nothing.

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The rule on calls

- ☐ No call that reopens the sale. No “how do you feel about everything?”
- ☐ Scheduling, access, safety and customer questions are handled promptly.

After the install, ask everything. Day ten to fourteen

- ☐ How was the rep?
- ☐ How was the booking call?
- ☐ What made you decide to do this now?
- ☐ What almost stopped you?
- ☐ Who else in the neighborhood has this problem?

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The Five Moments. Job sheet

CHAPTER 19. THE FIVE MOMENTS

Customer, job and crew lead _____

- ☐ **Moment one.** When the crew was assigned, the text went out with the crew lead's name and photograph.
- ☐ **Moment two.** A three-minute walk of the yard with the homeowner before anything was touched. Where he works, where the truck sits, where material stages, what she should move, and any existing damage on the record.
- ☐ **Moment three.** At completion: four photos, the debris shown to the homeowner, and a clean driveway.
- ☐ **Moment four.** An easy way to leave an honest review. A code or a link after the walkthrough. She chooses whether and when. Nobody waits for a rating, asks for a name in it or offers anything.
- ☐ **Moment five.** One tap after the first rain. Is it working like you expected?

After moment five

☐ Working as promised. Ask for the referral.

☐ Not working. Owner: _____ Follow-up time: _____

When the work has earned the ask, keep it specific.

Who on this street has the same thing going on?

The one neighbor she named _____

Day ten to fourteen. The office call

Called by, and date _____

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The closeout gate

CHAPTER 19. THE GATE THAT MAKES IT WORK

Every job closes with four photos and a checklist, or it is not closed out.

Not should. Not is expected to. Is not. The crew does not move on. The paperwork does not clear.

First, confirm the gate can be enforced

☐ Our closeout process can require the photos.

☐ It cannot. That is the day one build item, before we hire anybody.

Our four photos

1. _____
2. _____
3. _____
4. _____

Our closeout checklist

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

☐ _____

The photographs and the checklist must describe the actual work. A photo gate that collects four irrelevant pictures is not quality control.

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Field Quality Manager pilot

CHAPTER 19. ONE PERSON, TWO MARKETS, NINETY DAYS

The figures in the book are pilot assumptions to test, not results from a completed rollout. Put your own numbers here.

Markets _____

Start date and ninety-day review date _____

The person _____

The cadence, as designed

- ☐ Every morning, review the photos from every job closed the day before. About an hour.
- ☐ About seven finished jobs a day, unannounced. Check the route, crew count and time before you assume that covers every crew each week.
- ☐ First two weeks, every crew visited two or three times.
- ☐ A weekly crew scorecard, and the crews see it.

What he gets

A manager title, his own route, and first shot at the next install manager opening.

Record the baseline before the pilot starts

MEASURE	BASELINE	DAY NINETY
Callbacks		
Cancellations		
Reviews		
Crew retention		
Volume and mix		

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The cost

My planning arithmetic: sixty thousand dollars base plus twenty percent burden is about seventy-two thousand a year. A quarter of that is eighteen thousand.

Compensation for the quarter _____

Travel _____

Equipment _____

Installation capacity reassigned _____

The benefit. These are ifs until the pilot shows them

What one callback costs us _____

Callbacks prevented per week, measured _____

Contribution preserved by one saved cancellation _____

Cancellations saved per month, measured _____

- ☐ The same saved job is not counted in two benefit categories.
- ☐ Cost and benefit are compared over the same period.

Decision at day ninety _____

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Lead channel review

CHAPTER 15. THE HEDGE

One channel, one manager, one page.

Channel and manager _____

Reporting period _____

MEASURE, WITH ITS DEFINITION	RESULT	CANNOT RECONCILE
Activity		
Appointments set		
Demonstrations		
Net jobs		
Revenue		
Labor, supervision, travel, tools and administration		
Net cost per sale		

One broken handoff

The handoff and the correction _____

Person responsible _____

What I will inspect to know it happened _____

The continuation gate. Written before launch

Period, budget and next review date _____

Minimum results, including appointment quality _____

If it misses: ☐ Correct it ☐ Test again ☐ Stop

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Work the database

CHAPTER 15. START WITH THE RECORDS YOU HAVE

Every unsold estimate is work somebody already paid to create. Separate the reasons. Keep sold customers on a separate list.

REASON	WHAT IT MEANS	COUNT
Money	Wanted the work and could not make the purchase fit.	
Timing	Waiting for a season, an event or a decision. Capture the reason and the date in the original appointment.	
Unresolved	Wanted to think. Nobody followed up.	

Before the call

- ☐ Read the record first.
- ☐ Call with a real reason from the original inspection.
- ☐ Do not claim it must have become worse because time passed.
- ☐ Honor an unexpired written quote under its stated terms.
- ☐ A return visit does not skip discovery.

Program owner _____

Daily activity standard _____

CONTACTS	APPTS	DEMOS	NET JOBS	REVENUE

Why prospects did not proceed

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Canvassing daily sheet

CHAPTER 15. CANVASSING RUNS DAILY

Date and team _____

Before the team leaves

Assigned streets and blocks _____

- ☐ Boundaries and applicable rules understood.
- ☐ Drawn from finished work nearby where useful. No exaggeration of who bought.
- ☐ Opening practiced out loud, with another person, ten to fifteen minutes.

The count

DOORS	CONVERSATIONS	APPTS SET	APPTS SAT	NET SALES

Set means scheduled. Sat means the rep got into a demonstration. Do not let the two collapse into one number.

End of day

Streets that produced conversations _____

Hours that worked _____

The objection that repeated _____

What the weather changed _____

Did the door, the office and the rep expect the same appointment? ____

What changes on tomorrow’s route _____

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The interview

CHAPTER 17. THE HIRE

Candidate _____

Date _____

Referred by _____

Put the hard parts on the table first

- ☐ The actual schedule and territory for this role.
- ☐ The driving on a hard day.
- ☐ On call, and the days per week.
- ☐ Notice needed for planned time off.
- ☐ I asked whether it fits his life. Then: are you sure?

Agreement on the work

- ☐ An honest effort on every appointment.
- ☐ The system work completed correctly.
- ☐ Prepared for training.

Show what people actually earn

Real results, with the period and context clear. Only what you are authorized to share.

Somebody at the top _____

Somebody in the middle _____

Somebody still getting started _____

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What happens when it gets hard

The toughest situation he has overcome at work. What happened? What did he do? What part was his to own? How did it end?

What I am listening for

- ☐ Will he practice?
- ☐ Will he tell the truth about a miss?
- ☐ Will he take coaching?

The commitment runs both ways. If I tell somebody what the job will be, I have to deliver that job.

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Can somebody who is not you run it?

CHAPTER 20. SIMPLIFY

The test

Can an ordinary person, on a normal Tuesday, tired, in a parked vehicle, with a phone in one hand, execute this correctly?

What I am testing _____

Who ran it, and under what conditions _____

Where it broke _____

The three artifacts that survive you

	WHAT IT IS	IN WRITING	FOUND IN TEN SECONDS
Sequence	The order of operations, with the words where the words matter.		
Gate	The checklist with a consequence attached.		
Scorecard	The definitions of the numbers, with the thresholds.		

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Delete, then document

For every step, one question. What happens if we just do not do this?

STEP	THE SPECIFIC BAD OUTCOME WITHOUT IT	KEEP

The weekly question

Of what I did this week, how much produced something that will still be working in six months without me?

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The build standard

CHAPTERS 20 AND 23. A SYSTEM SOMEBODY RUNS

What I built, and the date of the build pass _____

Build rules

- ☐ It opens on the next action, not on a menu.
- ☐ Nothing is more than two taps away.
- ☐ It works with one thumb.
- ☐ Large type. Page background and text colors set on purpose.
- ☐ No fonts or resources loaded from outside.
- ☐ Tested in the views people actually use, on a phone.
- ☐ A PDF goes alongside anything read on a phone.
- ☐ Real content from the first version. No placeholders.
- ☐ It gives something back.

The kill pass. A separate day. Assume it is a six

Whole numbers, one to ten. No half points.

CRITERION	SCORE
Design	
Layout and navigation	
Functionality	
Wow factor	
Depth of thought	
User experience	
User success. Did the person get better?	

The lowest one _____

One upgrade that fixes it _____

What that upgrade buys, in one sentence _____

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Run a real job through it

CHAPTER 23. BEFORE YOU BUY OR ROLL OUT A TOOL

One ordinary complicated job

- ☐ A scope change.
- ☐ A corrected address.
- ☐ A manager trying to find out what happened.
- ☐ A crew needing the right photos.

The important paths

- ☐ Lead to appointment.
- ☐ Appointment to sold scope.
- ☐ Scope to installation.
- ☐ Completion to service.
- ☐ The exceptions the office handles every week.

Who tested it

☐ A newer user ☐ An experienced user ☐ The manager who retrieves the record later

Errors, repeat entry, missing information _____

_____

_____

Before committing

What must work on day one _____

Who owns each handoff _____

How we check the output against the source _____

What happens if the pilot misses the standard _____

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The pilot

Defined group _____

Period _____

Person who reviews mistakes _____

The condition that stops it _____

Decision at the end _____

Keep control of the record

- ☐ We know how to retrieve our records and what the fields mean.
- ☐ The approved backup and recovery process has been tested.
- ☐ Rights to tools and content are settled in writing.

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What the system needs to know

CHAPTER 22. SEVEN BODIES OF KNOWLEDGE

You do not need all seven before you help one person with one task.

BODY OF KNOWLEDGE	EXISTS IN WRITING	OWNER	CHECKED BY
Product knowledge. Failure modes, compatibility, limits.			
Sales knowledge. The actual sequence.			
Objection record. Her words and the step.			
Coaching rubric. What good looks like, and why.			
Performance record. Consistent definitions.			
Inspection and installation standards.			
Financing. Current, authorized terms.			

Start where a manager is already guessing

The recurring decision _____

How it is made today _____

What a correct answer looks like _____

The evidence a qualified person needs _____

The responsible person who checks the output _____

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The appointment debrief

- ☐ The homeowner's original words are kept.
- ☐ A customer quote is kept apart from the rep's interpretation.
- ☐ If the record is incomplete, that is visible.
- ☐ The step where it happened is recorded.

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Days 1 to 30. Define the work

CHAPTER 24. OWN THE VERTICAL

Office and product line _____

Leader, with time on the calendar _____

- ☐ Callbacks sorted by cause.
- ☐ Rode with the best installer and wrote down what he does that prevents them.
- ☐ Found the steps that belong in a named standard, and the photographs that show them.
- ☐ Sales and installation reviewed the same scope together.
- ☐ First three training priorities chosen from observed work.
- ☐ Daily practice and manager observation are on the calendar.
- ☐ The team knows what is changing and why.

The baseline

Period and source _____

Issued leads	Cancellations
Demonstrations	Callbacks
Net jobs	Customer feedback
Average value	Immature jobs

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The day thirty test

Somebody other than me can:

- ☐ Explain the standard.
- ☐ Find the evidence.
- ☐ Calculate the baseline.

If that is not true, finish this stage before widening the rollout.

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Days 31 to 60. Run the standard

CHAPTER 24. OWN THE VERTICAL

- ☐ The installation standard is trained in the pilot office. People demonstrated it.
- ☐ The CLARITY sequence is trained. People demonstrated it.
- ☐ The closeout record is enforced. The photos and checklist describe the actual work.
- ☐ One coaching lever per rep, chosen from the scorecard.
- ☐ Each lever was rechecked in a real appointment.
- ☐ Wrong source records were corrected.
- ☐ Managers can see the reasoning behind the same score.
- ☐ The assignment message goes out with the right name, photo and schedule.
- ☐ The crew lead walks the property before work.

Change log

DATE	CHANGE	OWNER	EXPECTED TO IMPROVE

Where it still breaks

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Days 61 to 90. Check what held

CHAPTER 24. OWN THE VERTICAL

- ☐ The completion review is added.
- ☐ The follow-up after the first meaningful test of the work is added.
- ☐ A reported problem gets an owner and the service loop is closed.
- ☐ The referral ask comes after the work has earned one.

Pilot against baseline. Same definitions

MEASURE	BASELINE	PILOT	SIMILAR OFFICE

Differences in lead mix, season, staffing and job maturity _____

The costs

Manager time _____

Training _____

Quality review and travel _____

Installation capacity reassigned _____

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The day ninety decision

☐ Continue ☐ Revise ☐ Expand ☐ Stop

Why _____

_____

_____

Any open concern, and its next defined test _____

Ownership and responsibility

Who maintains it _____

Who can approve changes _____

Who has access to the records _____

What happens if the builder leaves or changes roles _____

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The receipt log

CHAPTER 25. ONE ENTRY EACH MONTH

Keep it short enough that it gets written. Keep it precise enough that it is still useful a year from now.

Month _____

Accountable owner _____

The operating problem _____

The change. Which part, who used it, when _____

The result against the starting point _____

Definitions, period, group and source report _____

Who contributed _____

What did not improve _____

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What I would do differently _____

- ☐ The number of opportunities is shown beside every percentage.
- ☐ The cancellation treatment is stated.
- ☐ If several changes went in together, it says so.
- ☐ The claim matches the evidence. Exists, gets opened, or improves performance.
- ☐ It shares only what the reader is entitled to see.

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The Monday page

CHAPTERS 18 AND 21. PUT THE DECISION ON THE CALENDAR

Week of _____

Look across the business first

☐ The numbers ☐ The install backlog ☐ The escalations

Three priorities, each with a calendar block

#	PRIORITY	WHEN	WHO OWNS IT
1			
2			
3			

Developing people needs one of the three.

This week

- ☐ Recompute one rep's score from the underlying records.
- ☐ Choose one behavior to coach and schedule a time to observe it.
- ☐ Recognize one person by name for work the team can repeat.
- ☐ Put a sales leader and an installation leader together over a real handoff. One correction, its owner and its check-back date.

Close the loop before you finish

What got done _____

What is still blocked _____

Who owns the next move _____

The working tool I built for this is the Executive Command Center. You can explore it at michaeldelguyd.com/demo/command-center/.

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