

# Owner-Operator Systems Kit

A starter kit for owners and managers who need better visibility, cleaner handoff, stronger staffing decisions, and fewer blind spots in the weekly operating rhythm.

Owner-operators, GMs, branch leaders, and office managers

## GUIDE

A starter kit for owners and managers who need better visibility, cleaner handoff, stronger staffing decisions, and fewer blind spots in the weekly operating rhythm.

## WHAT THIS ASSET COVERS

- Front Door Score Tool for Small Businesses
- Owner-Operator Weekly Dashboard Template
- Service Business Hiring Scorecard
- Service Business Lead Handoff SOP
- Invoice Collection Prompt Pack

## SUGGESTED ROLLOUT

1. Score the current front door and expose the biggest operational leaks.
2. Install a weekly dashboard so leadership sees the same truth every week.
3. Use the hiring scorecard to improve the quality of customer-facing roles.
4. Clean up handoff and invoice follow-up so the back half of the business stops leaking too.

## WORKING ASSET

Use this kit when leadership needs a cleaner weekly management system instead of solving the same front-door and follow-up problems from memory.

## MANAGEMENT STACK

This kit is built around five management jobs:

- expose the biggest revenue leaks
- review the business through the same scoreboard every week
- tighten hiring quality for customer-facing roles
- stop handoff breakdowns between functions
- collect overdue cash without improvising every message

## ROLLOUT ORDER

1. run the Front Door Score Tool to expose the current leak profile
2. install the weekly dashboard so leadership is reviewing the same truth
3. tighten hiring standards for intake, dispatch, and service-adjacent roles
4. install the handoff SOP so no lead or appointment drifts ownerless
5. deploy the invoice collection prompt pack for slower-moving receivables

## EXECUTIVE REVIEW CADENCE

Monday: review the scoreboard, open risks, and the week's largest handoff failures.

Midweek: inspect one hiring, handoff, or collections workflow in detail.

Friday: review what improved, what stalled, and which issue should receive executive attention next week.

## ESCALATION CHECKPOINTS

- missed-call or unowned-lead spikes
- repeated no-shows or broken handoffs
- weak hiring signals in front-door roles
- receivables aging past the agreed threshold
- owner dependency increasing instead of declining

## INCLUDED ASSETS

- Front Door Score Tool
- Owner-Operator Weekly Dashboard Template
- Service Business Hiring Scorecard
- Lead Handoff SOP
- Invoice Collection Prompt Pack

## BEST USE

Best for owners, GMs, branch leaders, and office managers who need cleaner visibility, steadier execution, and fewer weekly surprises.

## DEPLOYMENT NOTES

### HOW STRONG TEAMS ACTUALLY USE THIS ASSET

- Assign one accountable owner instead of letting "Owner-Operator Systems Kit" become shared but unmanaged work.
- Use it with owner-operators, gms, branch leaders, and office managers in a weekly rhythm so the asset drives decisions rather than sitting in a folder.
- Decide in advance what counts as green, watch, and red performance so the team knows when to escalate.
- Capture learnings directly in the document every week so the asset becomes smarter over time instead of resetting to zero.

### 30-DAY ROLLOUT SEQUENCE

- Score the current front door and expose the biggest operational leaks.
- Install a weekly dashboard so leadership sees the same truth every week.
- Use the hiring scorecard to improve the quality of customer-facing roles.
- Clean up handoff and invoice follow-up so the back half of the business stops leaking too.

### WHAT SEPARATES A SERIOUS VERSION FROM A BASIC TEMPLATE

- Clear ownership for every step, not generic advice without accountability.
- Targets, thresholds, or decision rules that tell the team what good looks like.
- Specific working components: Front Door Score Tool for Small Businesses, Owner-Operator Weekly Dashboard Template, Service Business Hiring Scorecard, and more.
- A built-in review cadence so the document becomes part of operations rather than a one-time download.