Break In Audit

Find the blind spots in your roofing company before a competitor does. One hour, your leadership team, one priority for next quarter.

Three tools, in order

1

Break In

Walk five rooms of your company like a competitor would. List every way in.

2

Brutal Facts

Turn every opinion into a fact with a number. No number means not measured.

3

Fix This Next

Find the lowest level where you are stuck. That is the one thing to fix first.

The 60-minute leadership meeting

0 to 15 min	**Break In.** Everyone lists vulnerabilities alone, no talking. Rate each one for danger and probability.
15 to 35 min	**Brutal Facts.** Share only the High/High items. Rewrite each as a fact with a number.
35 to 50 min	**Fix This Next.** Map each fact to Sales, Profit or Order. Find the lowest level where you are stuck.
50 to 60 min	**Commit.** Pick one. Assign one owner. Set one number that proves it is fixed in 90 days.

Ground rule Work alone first. The owner shares last. If the owner talks first, everyone else

Break In

It is 2 a.m. A competitor is at your desk with your CRM, your P&L and your job files. Where do they get in? Work alone, no talking. List vulnerabilities in each room, then circle a rating for each.

Danger: H immediate · M near term · L longer term

Probability: H happening now · M likely soon · L not soon

1. Lead flow and marketing

One source, speed to lead, cost per signed job, review velocity

VULNERABILITY	DANGER			PROBABILITY		
_____	H	M	L	H	M	L
_____	H	M	L	H	M	L
_____	H	M	L	H	M	L

2. Sales

Rep concentration, written process, proposal follow up, pricing discipline

VULNERABILITY	DANGER			PROBABILITY		
_____	H	M	L	H	M	L
_____	H	M	L	H	M	L
_____	H	M	L	H	M	L

3. Production and quality

Scheduling linchpin, crew capacity, callbacks by crew, shared subs

VULNERABILITY	DANGER			PROBABILITY		
_____	H	M	L	H	M	L
_____	H	M	L	H	M	L
_____	H	M	L	H	M	L

4. Cash and finance

AR over 60 days, stuck supplements, monthly close, margin by job type

VULNERABILITY	DANGER			PROBABILITY		
_____	H	M	L	H	M	L
_____	H	M	L	H	M	L
_____	H	M	L	H	M	L

5. People and leadership

Linchpins, unclear roles, owner bottleneck, pay vs market

VULNERABILITY	DANGER			PROBABILITY		
_____	H	M	L	H	M	L
_____	H	M	L	H	M	L
_____	H	M	L	H	M	L

Next: circle every High/High, High/Medium and Medium/High. That is

The Brutal Facts

Hold two things at once: total faith you will win, and the discipline to face exactly where you are today. Every item on your shortlist has to pass one test. Is it a fact, or an opinion?

OPINION	BRUTAL FACT
We need more leads.	**We need 30 qualified leads a week to hit plan. We average 11.**
Our close rate is bad.	**Team closed 22% of demos. Top two reps closed 38%. The rest closed 14%.**
Money is tight.	**Cash is down 20% year over year. $310K in AR is over 60 days.**
Production is a mess.	**Contract to install went from 19 days to 41 days this year.**

Examples are illustrative. Use your own numbers.

Your five brutal facts

	WHAT WE KEEP SAYING	THE FACT, WITH A NUMBER	MEASURED?
1			Y N
2			Y N
3			Y N
4			Y N
5			Y N

Cluster them

Put the team's facts on the wall, one per sticky note. Group the ones that belong together. Label each group in one or two words.

CLUSTER 1	CLUSTER 2	CLUSTER 3	CLUSTER 4

Can't put a number on it? Write not measured. That is a brutal fact too.

Fix This Next

A business has a hierarchy of needs: Sales, then Profit, then Order, then Impact and Legacy. Check every statement that is true today. The lowest level with an unchecked box is where you start, even if a higher problem feels more exciting.

LEVEL 1 Sales

- [ ] We know the sales number we must hit to support our growth plan.
- [ ] We attract enough quality prospects, not just leads, to hit it.
- [ ] We convert enough of them, and we know our close rate by rep.
- [ ] We fully deliver what we promised the homeowner.
- [ ] We collect what we are owed, insurance and retail, on time.

LEVEL 2 Profit

- [ ] We pay debt down instead of piling it up.
- [ ] We know our margin by job type, and it is healthy.
- [ ] We hold three months of expenses in cash.

LEVEL 3 Order

- [ ] The company runs when a key person is out for two weeks.
- [ ] People sit in roles that match what they are good at.
- [ ] The people closest to a problem can fix it without calling the owner.

One thing. One owner. One number. One quarter.

The one thing _____

Owner _____

The number that proves it _____

Fixed by _____

Team won't say it in front of you?

That is normal. It is what a Guide is for. Take the free Pinnacle Baseline Assessment or book a 30-minute fit call.

Book a fit call

go.yourbusinessguide.com/fit-call