NUMBERS & COMPANY

PREMIUM COMPANION GUIDE

The Profit Way

Companion Guide

An Operating Fieldbook for Building a Business with Clarity, Margin, and Purpose

Ryan D. Eldridge

Design your business. Protect your margin. Build what lasts.

THE PROFIT WAY OPERATING FOUNDATION

Begin with an honest picture.

This guide is designed to help you turn the message of The Profit Way into visible work, practical decisions, and repeatable rhythms.

THE PROFIT WAY OPERATING FOUNDATION

How to use this guide

Read one chapter of The Profit Way before completing its companion session. The book provides the message and the framework. This guide provides the structure for action.

Do not rush to complete every page. Move through one session at a time. Score the current condition honestly, complete the tool, make one clear decision, and place a review date on the calendar. A written page does not create change by itself. A visible decision, consistent practice, and honest review can.

Read

Read the chapter slowly. Notice the business condition, responsibility, or decision it brings into view.

Score

Use the 1-to-4 scorecards to identify what is unclear, inconsistent, dependable, or strong.

Decide

Use the practical tool to choose one next move. Make the action clear enough to schedule and review.

Repeat

Return to the Fieldbook each week, month, quarter, and year so the work becomes a rhythm rather than a one-time exercise.

> **The goal is not information consumption. The goal is visible action.**

CORE PHILOSOPHY

Build a business that can carry responsibility.

The Profit Way is built around a simple conviction: business owners make stronger decisions when they see the condition of the business clearly, protect margin before pressure arrives, and build with purpose instead of reaction.

The guide follows the same movement in every session. First, it brings the current condition into view. Then it makes the chapter's architecture practical. It asks the questions that expose pressure and drift. Finally, it turns the work into one concrete decision and an implementation plan.

01
Plan
Design the future on purpose.

02
Revenue
Build work that creates strength.

03
Finance
Protect margin before pressure arrives.

04
Technology
Build systems that serve the work.

VISUAL MAP

The Profit Way pathway

1 **See What You Carry** Stewardship, clarity, and the whole field bring the current condition into view.	2 **Build What Can Carry Weight** Plan, revenue, finance, technology, and owner pay create a stronger operating structure.	3 **Lead What Lasts** Ninety-day execution, capital, legacy, and financial leadership prepare the business for the future.

Session Pathway

1. Read the chapter.
2. Complete the scorecard.
3. Use the practical tool.
4. Make one decision.
5. Assign a due date and review date.
6. Return to the Fieldbook rhythm.

BASELINE ASSESSMENT

Begin with an honest picture.

Score every category before you begin. The goal is not a perfect score. The goal is to identify where pressure is being created and where the next decision belongs.

Session	Category	Opening Score	Key Observation
01	Stewardship Begins with Ownership	____________	
02	Clarity Comes Before Direction	____________	
03	The Whole Field	____________	
04	Plan	____________	
05	Revenue	____________	
06	Finance	____________	
07	Technology	____________	
08	Owner Pay	____________	
09	The Ninety-Day Rhythm	____________	
10	Capital and Capacity	____________	
11	Wealth and Legacy	____________	
12	Lead the Numbers	____________	

BASELINE REFLECTION

Choose the first work.

Reflection	Your Answer
Highest Score	
Why It Is Strong	
Lowest Score	
What Is Creating Pressure	
First Decision	
Who Needs to Be Involved	
Review Date	

Opening Reflection

What would change if the business became clearer, more durable, and less dependent on pressure to make decisions?

SESSION 01 / FOUNDATION

Stewardship Begins with Ownership

What Has Been Entrusted to You

You lead the business differently when you see its money, people, time, and opportunity as entrusted rather than simply owned.

PRIMARY SCRIPTURE

Psalm chapter 24, verse 1

SUGGESTED TIME

45-60 minutes

Read the chapter first. Then use this session to make one clear decision, build one practical structure, and establish one review rhythm.

THE AWAKENING

Stewardship Begins with Ownership

Business ownership can make everything feel personal. You took the risk, signed the documents, built the customer relationships, and carried the uncertainty. That kind of responsibility can quietly turn into a belief that every dollar, decision, and opportunity exists for one purpose: to be extracted before it is lost.

Stewardship brings a larger view. It asks how the business is serving the people connected to it, whether its resources are being directed with care, and what kind of responsibility is being carried forward. This is the first work of The Profit Way: receive what has been entrusted with humility and lead it with purpose.

THE ARCHITECTURE

Stewardship becomes practical when the owner can name what has been placed in his care and the responsibility attached to each area.

01

Money

Revenue, profit, cash, debt, and tax obligations need a clear purpose before they are spent.

02

People

Employees, contractors, customers, and partners need clear expectations, fair treatment, and honest communication.

03

Time

The calendar reveals whether the owner is leading the essential work or only responding to the urgent work.

04

Opportunity

A new client, partnership, market, or investment should be measured by fit, capacity, and long-term responsibility.

THE RADICAL INQUIRY

Look beneath the surface.

Answer slowly. The goal is not a polished response. The goal is an honest one.

01 **Where am I treating an entrusted resource as though it exists only for my immediate use?**

Look at money, time, people, and opportunity. Name the area where pressure has narrowed your view.

02 **What responsibility am I carrying that the current business structure is not carrying with me?**

Consider decisions, customer issues, follow-up, financial review, or work that only exists in your memory.

03 **What would faithful leadership look like in the next thirty days?**

Choose a visible action, not a vague intention.

THE MASSIVE ACTION BLUEPRINT

Turn insight into a concrete decision.

Begin by scoring the current condition. Your score is not a verdict. It is a starting point for honest action.

Category Scorecard

Circle one response for each statement. Use the score that most honestly reflects the current condition.

Category Total: ________ / 16

Statement	Satisfaction Score
I can clearly name the resources the business has been entrusted to lead.	1 2 3 4
I make business decisions with the customer, team, and future in view.	1 2 3 4
I keep money, people, time, and opportunity from being directed only by urgency.	1 2 3 4
I can explain the responsibility I carry as an owner beyond earning a profit.	1 2 3 4

1 = Least Satisfied
This area is unclear, inconsistent, reactive, avoided, or under pressure.

2 = Somewhat Satisfied
The issue is visible, but the practice is not yet dependable.

3 = Satisfied
This area is generally functioning, though it needs continued attention.

4 = Highly Satisfied
This area is clear, intentional, measured, and supported by a repeatable rhythm.

Read Your Result

Low | 4-6

The business may be active, yet the owner is carrying responsibility without a clear stewardship lens. Pressure is likely determining what receives attention.

Medium | 7-11

The owner sees the broader responsibility, but the practice may still depend on personal effort rather than clear habits and structures.

High | 12-16

The business is being led with a durable sense of responsibility. Protect this perspective by reviewing how money, people, time, and opportunity are being directed.

NEXT-STEP TAKEAWAY

Choose the entrusted resource creating the greatest pressure and give it a clear owner, purpose, and review rhythm.

PRACTICAL TOOL

Entrusted Resources Inventory

Make the current field visible. Identify what has been entrusted, where it is under pressure, and what faithful care requires next.

Entrusted Area	What Has Been Entrusted?	Current Condition	Pressure or Risk	Faithful Next Step
Money				
People				
Time				
Opportunity				

Stewardship question: What would change if this area were led as a trust rather than simply a possession?

Decision Framework

Use these questions to identify the decision that belongs to this session.

What entrusted area needs immediate attention?

What responsibility has become too dependent on me?

What clear boundary, rhythm, or ownership decision belongs here?

Implementation Blueprint

Identify the one action that will strengthen this area first. Keep the commitment clear enough to review.

Priority Area	First Action	Owner	Due Date	Review Date	Support Needed	Expected Result

Commitment

I will lead the resources entrusted to me with greater honesty, purpose, and care.

MY SPECIFIC COMMITMENT

Signature ______________________ Date ______________________

The first step toward leading well is to receive responsibility with humility and carry it with purpose.

SESSION 02 / SEE WHAT IS TRUE

Clarity Comes Before Direction

Knowing the Condition of What You Lead

Direction becomes useful when it is built on an honest understanding of the business as it actually is.

PRIMARY SCRIPTURE

Nehemiah chapter 2, verse 13

SUGGESTED TIME

60-75 minutes

Read the chapter first. Then use this session to make one clear decision, build one practical structure, and establish one review rhythm.

THE AWAKENING

Clarity Comes Before Direction

When a business feels uncertain, the instinct is often to search for the next answer. More sales, a new hire, another tool, or a different offer may seem like the needed move. Many decisions become expensive because the owner moves before clearly identifying the condition of the business.

Clarity begins with inspection. It requires the owner to look at the condition of revenue, people, operations, and numbers without avoiding what the business is revealing. The goal is not more analysis. It is a more truthful starting place for direction.

THE ARCHITECTURE

A business becomes easier to lead when the owner can see the condition of the four areas that shape daily execution.

01

Revenue

Know where sales come from, what work produces healthy returns, and where concentration or weak pricing creates risk.

02

People

Make roles, authority, accountability, and development visible so work does not return to the owner by default.

03

Operations

Trace the path from first inquiry to completed work. Find the handoffs, bottlenecks, and repeated points of confusion.

04

Numbers

Review revenue, costs, cash movement, receivables, obligations, and capacity before pressure forces a decision.

THE RADICAL INQUIRY

Look beneath the surface.

Answer slowly. The goal is not a polished response. The goal is an honest one.

01 **What part of the business have I avoided looking at closely?**

Name the report, process, relationship, or decision you have allowed to remain unclear.

02 **Where is the business depending on assumption, memory, or informal communication?**

Look for the places where the same question, mistake, or delay keeps returning.

03 **What is the difference between the problem I see and the cause beneath it?**

Separate the visible symptom from the condition that may be creating it.

Turn insight into a concrete decision.

Begin by scoring the current condition. Your score is not a verdict. It is a starting point for honest action.

Category Scorecard

Circle one response for each statement. Use the score that most honestly reflects the current condition.

Category Total: ________ / 16

Statement	Satisfaction Score
I understand the current condition of revenue, people, operations, and numbers.	1 2 3 4
The business has clear roles and the team knows where responsibility begins and ends.	1 2 3 4
I can identify the recurring bottlenecks, missed handoffs, or customer friction points.	1 2 3 4
I review useful information before I make major decisions.	1 2 3 4

1 = Least Satisfied This area is unclear, inconsistent, reactive, avoided, or under pressure.	**2 = Somewhat Satisfied** The issue is visible, but the practice is not yet dependable.
3 = Satisfied This area is generally functioning, though it needs continued attention.	**4 = Highly Satisfied** This area is clear, intentional, measured, and supported by a repeatable rhythm.

Read Your Result

Low | 4-6

The system may be active but unclear. The business is likely creating unnecessary pressure because decisions are being made from partial information.

Medium | 7-11

The owner sees the main issues, but inspection may happen only when something becomes urgent. A weekly and monthly visibility rhythm is needed.

High | 12-16

The business is being led with honest visibility. Protect this strength by keeping the reports, conversations, and processes close to the actual work.

NEXT-STEP TAKEAWAY

Inspect the one area where the business is currently asking you to guess, then make the condition visible.

PRACTICAL TOOL

Business Condition Inspection

Look at the present condition before deciding what to change. Name what is strong, what is exposed, and what must be inspected more closely.

Area	What Is Working?	What Is Unclear?	Evidence I Need	First Inspection Step
Revenue				
People				
Operations				
Numbers				

Inspection discipline: Do not solve the issue on this page. First make the condition clear enough to lead it wisely.

Decision Framework

Use these questions to identify the decision that belongs to this session.

What condition must be understood before I choose a direction?

What evidence will show me whether I am solving a cause or only a symptom?

Who needs to help inspect this area with me?

Implementation Blueprint

Identify the one action that will strengthen this area first. Keep the commitment clear enough to review.

Priority Area	First Action	Owner	Due Date	Review Date	Support Needed	Expected Result

Commitment

I will look closely at the condition of the business before I decide what to change.

MY SPECIFIC COMMITMENT

Signature

Date

Wise direction begins when the owner is willing to see what is true.

SESSION 03 / SEE THE WHOLE FIELD

The Whole Field

Leading the Business, Household, Future, and Legacy Together

The business is not the whole field, but its decisions affect the household, the future, and the legacy being prepared.

PRIMARY SCRIPTURE

Leviticus chapter 19, verses 9 through 10

SUGGESTED TIME

60-75 minutes

Read the chapter first. Then use this session to make one clear decision, build one practical structure, and establish one review rhythm.

THE AWAKENING

The Whole Field

A business has its own accounts, customers, people, and obligations. Its decisions still reach further. A difficult month can shape the mood at home. A business that requires constant attention can take time and presence from the people closest to the owner. A company that consumes every available resource can leave little room to prepare for the future.

The whole field helps the owner see those connections without blending every area together. The business needs to be led as a business. The household needs steadiness. The future needs attention before it becomes urgent. Legacy needs conversations and preparation long before transition arrives.

THE ARCHITECTURE

The four areas are connected, yet each needs its own boundaries, responsibility, and review rhythm.

01

Business

Customers, team, delivery, revenue, finance, and systems must be strong enough to carry current responsibilities.

02

Household

Income and time need steadiness so the family does not absorb every change in the business.

03

Future

Capacity, reserves, people development, and preparation create options for the next season.

04

Legacy

Values, systems, relationships, and resources should become more understandable and transferable over time.

THE RADICAL INQUIRY

Look beneath the surface.

Answer slowly. The goal is not a polished response. The goal is an honest one.

01

Where is the business creating pressure in another part of the field?

Consider the household, your calendar, future decisions, or relationships that are carrying more strain than they should.

02

What boundary would help the business support the larger field rather than consume it?

A boundary may involve money, time, work scope, decision rights, or access to you.

03

What future responsibility is being delayed because the current season is consuming all attention?

Name the one conversation, plan, or structure that deserves a place on the calendar.

Turn insight into a concrete decision.

Begin by scoring the current condition. Your score is not a verdict. It is a starting point for honest action.

Category Scorecard

Circle one response for each statement. Use the score that most honestly reflects the current condition.

Category Total: ________ / 16

Statement	Satisfaction Score
I can see how business decisions affect the household, future capacity, and legacy.	1 2 3 4
The business and household have clear boundaries around money, time, and decision-making.	1 2 3 4
I protect time and resources for future preparation rather than allowing the present to consume everything.	1 2 3 4
I am building a company that can become more understandable and transferable over time.	1 2 3 4

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Read Your Result

Low | 4-6

One area of the field may be quietly consuming the others. The business may be active, but its responsibilities are not yet held in healthy proportion.

Medium | 7-11

The owner sees the connections, but the boundaries and rhythms may still be informal or easily disrupted by pressure.

High | 12-16

The larger field is being led with awareness and restraint. Continue protecting clear boundaries as the business grows or changes seasons.

NEXT-STEP TAKEAWAY

Name the one boundary that will reduce pressure across the whole field, then put it into practice this week.

PRACTICAL TOOL

Whole Field Alignment Map

Identify where the business is strengthening the larger field and where it may be creating strain that requires a boundary or decision.

Field Area	What Is Being Supported?	What Is Under Pressure?	Boundary Needed	Conversation or Decision
Business				
Household				
Future				
Legacy				

Whole-field principle: A healthy business should create strength that serves the people and future connected to it.

Decision Framework

Use these questions to identify the decision that belongs to this session.

Where is one area silently consuming the others?

What must remain separate in order to remain clear?

What first boundary protects the whole field?

Implementation Blueprint

Identify the one action that will strengthen this area first. Keep the commitment clear enough to review.

Priority Area	First Action	Owner	Due Date	Review Date	Support Needed	Expected Result

Commitment

I will lead the business as part of a larger field of responsibility, with clear boundaries and a longer view.

MY SPECIFIC COMMITMENT

Signature ______________________ Date ______________________

A wise owner sees the business as part of the field he has been entrusted to lead.

SESSION 04 / BUILD DIRECTION

Plan

Designing the Future on Purpose

Planning gives the owner a practical way to design the future rather than allowing urgency to choose the direction of the business.

PRIMARY SCRIPTURE

Luke chapter 14, verse 28

SUGGESTED TIME

60-75 minutes

Read the chapter first. Then use this session to make one clear decision, build one practical structure, and establish one review rhythm.

THE AWAKENING

Plan

Business owners often spend more time responding to the future than designing it. The week fills with customer needs, team questions, financial demands, and new opportunities. None of those responsibilities are unimportant. Without a plan, however, the loudest thing begins to determine the direction of the company.

Planning creates a disciplined pause. It helps the owner decide what the business is building, what must be true for it to move forward, and what it is willing to protect along the way. It turns ideas into priorities that can guide the calendar, the team, and the next season of work.

THE ARCHITECTURE

A useful plan connects long-term direction to the next faithful action without turning the business into a collection of complicated documents.

01

Longer Direction

Describe the kind of company you are building and the work it should be known for over the next three years.

02

Annual Milestones

Identify the capabilities, revenue quality, team strength, or systems that need to be built in the coming year.

03

Ninety-Day Priorities

Choose a small number of outcomes that will materially strengthen the business during the current season.

04

Weekly Actions

Give each priority a place on the calendar, an owner, and a next step that can be reviewed.

THE RADICAL INQUIRY

Look beneath the surface.

Answer slowly. The goal is not a polished response. The goal is an honest one.

01 **What is the business trying to build that is not yet visible in the weekly calendar?**

Look for the direction you can describe but have not yet given time, ownership, or resources.

02 **What good opportunity is distracting the business from its best work?**

Name the work, offer, or idea that does not fit the direction or current capacity.

03 **What must be true before the business takes on its next layer of responsibility?**

Consider people, systems, revenue, financial capacity, and customer delivery.

Turn insight into a concrete decision.

Begin by scoring the current condition. Your score is not a verdict. It is a starting point for honest action.

Category Scorecard

Circle one response for each statement. Use the score that most honestly reflects the current condition.

Category Total: ________ / 16

Statement	Satisfaction Score
I can clearly explain the direction the business is building toward.	1 2 3 4
The current ninety-day priorities connect to the larger plan.	1 2 3 4
The team can understand what matters most in the current season.	1 2 3 4
I review the plan often enough for it to shape real decisions.	1 2 3 4

1 = Least Satisfied This area is unclear, inconsistent, reactive, avoided, or under pressure.	**2 = Somewhat Satisfied** The issue is visible, but the practice is not yet dependable.
3 = Satisfied This area is generally functioning, though it needs continued attention.	**4 = Highly Satisfied** This area is clear, intentional, measured, and supported by a repeatable rhythm.

Read Your Result

Low | 4-6

The company may be moving quickly without a shared direction. Urgent work is likely determining what receives time and resources.

Medium | 7-11

A direction exists, but it may not yet be translated into a few clear priorities and weekly ownership.

High | 12-16

The plan is influencing real decisions. Protect this strength by reviewing it when new opportunities and pressure compete for attention.

NEXT-STEP TAKEAWAY

Choose the one priority that best supports the larger direction, then make room for it on the calendar.

PRACTICAL TOOL

Planning Cascade

Turn direction into a usable path. Move from the future you are building to the next work that belongs on the calendar.

Planning Layer	Your Answer
Three-Year Direction	
One-Year Milestone	
Ninety-Day Priority	
This Week's First Action	
What I Will Decline or Delay	

Planning filter: A good opportunity may still be the wrong opportunity when it does not serve the direction or capacity of the business.

Decision Framework

Use these questions to identify the decision that belongs to this session.

What are we building?

What must be true before we take on more?

What deserves focused attention during the next ninety days?

Implementation Blueprint

Identify the one action that will strengthen this area first. Keep the commitment clear enough to review.

Priority Area	First Action	Owner	Due Date	Review Date	Support Needed	Expected Result

Commitment

I will give the future a clear direction, a small number of priorities, and a place in the weekly work.

MY SPECIFIC COMMITMENT

Signature ____________________ Date ____________________

A plan becomes useful when it enters the calendar.

SESSION 05 / BUILD REVENUE STRENGTH

Revenue

Building Work That Creates Strength

Revenue becomes healthy when the work being sold fits the business, serves customers well, and creates capacity rather than constant strain.

PRIMARY SCRIPTURE

Proverbs chapter 31, verse 18

SUGGESTED TIME

75-90 minutes

Read the chapter first. Then use this session to make one clear decision, build one practical structure, and establish one review rhythm.

THE AWAKENING

Revenue

Revenue is essential, but the total sales number does not tell the whole story. A business can be busy without becoming stable. It can add customers while placing more strain on the team. It can increase sales while losing the margin required to deliver well and prepare for what comes next.

The owner needs to understand the quality of revenue. Which work creates healthy strength? Which customers fit the business? Which services are underpriced, difficult to deliver, or too dependent on the owner? Healthy revenue is designed around valuable work, clear pricing, dependable relationships, and realistic capacity.

THE ARCHITECTURE

Revenue strength comes from four connected decisions. Each one affects whether growth strengthens the company or simply increases its demands.

01

Core Offer

Define the work the business is equipped to do well and the value customers are willing to pay for.

02

Pricing

Price the work with respect for the skill, time, people, systems, and responsibility required to deliver it well.

03

Customer Journey

Build trust through clear first contact, strong delivery, follow-up, repeat work, and referrals.

04

Capacity and Risk

Match sales to what the team can deliver and reduce harmful dependence on one customer, service, or source.

THE RADICAL INQUIRY

Look beneath the surface.

Answer slowly. The goal is not a polished response. The goal is an honest one.

01 **Which work creates the greatest strength in the business?**

Consider revenue, margin, customer fit, ease of delivery, team capacity, and repeatability.

02 **Which work produces activity but weakens the company?**

Name the service, customer pattern, discount, or workload that consumes more than it returns.

03 **Where is the business dependent on one customer, source, or season?**

Identify a risk that should be understood before it becomes urgent.

THE MASSIVE ACTION BLUEPRINT

Turn insight into a concrete decision.

Begin by scoring the current condition. Your score is not a verdict. It is a starting point for honest action.

Category Scorecard

Circle one response for each statement. Use the score that most honestly reflects the current condition.

Category Total: ________ / 16

Statement	Satisfaction Score
I know which products, services, or customers create healthy revenue for the business.	1 2 3 4
Our pricing reflects the cost and responsibility of delivering the work well.	1 2 3 4
We have a clear path from inquiry to follow-up, delivery, repeat work, and referral.	1 2 3 4
Revenue growth is matched to realistic delivery capacity and customer concentration risk.	1 2 3 4

1 = Least Satisfied This area is unclear, inconsistent, reactive, avoided, or under pressure.	**2 = Somewhat Satisfied** The issue is visible, but the practice is not yet dependable.
3 = Satisfied This area is generally functioning, though it needs continued attention.	**4 = Highly Satisfied** This area is clear, intentional, measured, and supported by a repeatable rhythm.

Read Your Result

Low | 4-6

Revenue may be coming in without enough clarity about the work that is actually creating strength. The business may be over-serving weak opportunities.

Medium | 7-11

The owner understands the main revenue sources, but pricing, capacity, follow-up, or concentration may still need disciplined attention.

High | 12-16

Revenue is being designed with customer value and business strength in view. Protect this by reviewing the work as demand and capacity change.

NEXT-STEP TAKEAWAY

Choose one revenue source to strengthen, one source to price or simplify, and one risk to reduce.

PRACTICAL TOOL

Revenue Strength Review

Use current and prior period information to see whether revenue is becoming stronger, more profitable, and less dependent on one source.

Purpose

See the difference between higher sales and healthier revenue. Use the calculations to begin a better conversation with your bookkeeper, team, or advisor.

Input	Current Period	Prior Period
Total Sales		
Direct Cost of Delivery		
Largest Customer Sales		
Number of Completed Sales		

Measure	Formula	Your Result
Sales vs. Prior Period %	(Current Sales / Prior Sales) x 100	
Gross Margin %	((Current Sales - Current Direct Cost) / Current Sales) x 100	
Largest Customer Concentration %	(Largest Customer Sales / Current Sales) x 100	
Average Sale	Current Sales / Number of Completed Sales	

Formula note: Use the same reporting period for every input. A result above 100% means current sales are higher than the prior period. In a spreadsheet, enter Current Sales / Prior Sales and format the result cell as a percentage. A result below 100% means current sales are lower. If prior-period sales are zero, Sales vs. Prior Period % is not applicable; record the dollar change and note the new revenue source instead.

Worked Example	Example Value
Current Sales	$120,000
Prior Sales	$100,000
Sales vs. Prior Period %	120%
Current Direct Cost	$48,000
Gross Margin %	60%
Largest Customer Sales	$30,000
Largest Customer Concentration %	25%

What the result may reveal

Revenue may be rising while margin is weakening. Concentration may be high enough that one customer could create pressure. Use the result to identify the next conversation, pricing review, or customer-development decision.

Revenue Source	Customer / Segment	Healthy or Under Pressure?	Action to Strengthen or Simplify

Decision Framework

Use these questions to identify the decision that belongs to this session.

What work should we pursue more intentionally?

What work needs a pricing, process, or capacity decision?

What revenue risk should be reduced during this season?

Implementation Blueprint

Identify the one action that will strengthen this area first. Keep the commitment clear enough to review.

Priority Area	First Action	Owner	Due Date	Review Date	Support Needed	Expected Result

Commitment

I will build revenue around work that creates strength for the customer, the team, and the business.

MY SPECIFIC COMMITMENT

Signature ____________________ Date ____________________

Revenue should create strength in the business and trust in the market.

SESSION 06 / PROTECT FINANCIAL STRENGTH

Finance

Protecting Margin Before Pressure Arrives

Finance gives every dollar a purpose so the business can meet obligations, protect margin, and make decisions before pressure takes over.

PRIMARY SCRIPTURE

Proverbs chapter 21, verse 20

SUGGESTED TIME

75-90 minutes

Read the chapter first. Then use this session to make one clear decision, build one practical structure, and establish one review rhythm.

THE AWAKENING

Finance

A company can have customers, sales, and a full schedule while living too close to the edge. Money may be coming in, yet the owner may not be able to explain what has been set aside, what obligations are approaching, or what the business can safely carry next. A strong month can hide weak financial habits for a while.

Finance creates order before pressure arrives. It helps the owner understand the cost of the work, the timing of cash, the obligations coming next, and the margin required to remain steady. The goal is not to create a complex financial system. The goal is to make the financial condition visible enough for wise decisions.

THE ARCHITECTURE

Margin is protected when financial leadership makes the purpose of revenue visible before it is spent.

01

Know the Cost

Understand the direct costs, operating costs, and financial demands required to keep the company's promises.

02

See Cash Movement

Track when money enters, when obligations are due, and where timing gaps create pressure.

03

Keep Boundaries Clear

Maintain clear business records and separate the business's needs from the household's needs.

04

Give Margin a Job

Prepare for taxes, reserves, improvement, and future capacity before present pressure consumes everything.

THE RADICAL INQUIRY

Look beneath the surface.

Answer slowly. The goal is not a polished response. The goal is an honest one.

01 **Where is the business treating future obligations as if they are available operating cash?**

Consider taxes, debt, repairs, slow-paying customers, planned investments, and upcoming payroll.

02 **What financial information do I need before I make the next major decision?**

Name the report, number, or conversation that would move you from assumption to clarity.

03 **What expense or financial habit has remained unreviewed for too long?**

Look for recurring costs, personal use, weak collections, underpriced work, or commitments that no longer fit.

Turn insight into a concrete decision.

Begin by scoring the current condition. Your score is not a verdict. It is a starting point for honest action.

Category Scorecard

Circle one response for each statement. Use the score that most honestly reflects the current condition.

Category Total: ________ / 16

Statement	Satisfaction Score
I understand the major costs and obligations required to deliver our work.	1 2 3 4
I review cash movement, receivables, upcoming obligations, and available capacity consistently.	1 2 3 4
Business money is visible as business money, with clear records and clear boundaries.	1 2 3 4
The business intentionally prepares for taxes, reserves, and future needs before pressure arrives.	1 2 3 4

1 = Least Satisfied This area is unclear, inconsistent, reactive, avoided, or under pressure.	**2 = Somewhat Satisfied** The issue is visible, but the practice is not yet dependable.
3 = Satisfied This area is generally functioning, though it needs continued attention.	**4 = Highly Satisfied** This area is clear, intentional, measured, and supported by a repeatable rhythm.

Read Your Result

Low | 4-6

Pressure may be functioning as the financial system. The owner needs a simple visibility rhythm before the next obligation creates a crisis.

Medium | 7-11

The basic structure exists, but key decisions may still be made from the bank balance or from delayed information.

High | 12-16

Financial discipline is creating room for better choices. Keep the review rhythm close to the actual movement of money and obligations.

NEXT-STEP TAKEAWAY

Make one financial condition visible this week: cost of delivery, cash movement, receivables, taxes, or operating drag.

PRACTICAL TOOL

Financial Condition Snapshot

Use a simple period comparison to see whether the business is building margin or simply moving more money through the system.

Purpose

Use current and prior period information. The goal is to identify the financial condition that deserves immediate attention.

Input	Current Period	Prior Period
Sales		
Direct Cost of Delivery		
Operating Expenses		
Payroll		
Cash on Hand		
Accounts Receivable		

Measure	Formula	Your Result
Sales vs. Prior Period %	(Current Sales / Prior Sales) x 100	
Direct Cost %	(Current Direct Cost / Current Sales) x 100	
Operating Expense %	(Current Operating Expenses / Current Sales) x 100	
Payroll %	(Current Payroll / Current Sales) x 100	
Accounts Receivable % of Sales	(Current Accounts Receivable / Current Sales) x 100	

Formula note: Use the same reporting period for every input. A result above 100% means current sales are higher than the prior period. In a spreadsheet, enter Current Sales / Prior Sales and format the result cell as a percentage. A result below 100% means current sales are lower. If prior-period sales are zero, Sales vs. Prior Period % is not applicable; record the dollar change and note the new revenue source instead. Accounts Receivable % of Sales is a snapshot of outstanding receivables relative to current sales, not a collection-days calculation.

Worked Example	Example Value
Current Sales	$120,000
Prior Sales	$100,000
Sales vs. Prior Period %	120%
Current Direct Cost	$48,000
Direct Cost %	40%
Current Operating Expenses	$30,000
Operating Expense %	25%
Current Payroll	$24,000
Payroll %	20%

What the result may reveal

Sales can rise while direct costs, payroll, operating expenses, or receivables create more pressure. Compare the percentages over time and identify what needs a decision before the next period begins.

Financial Area	What the Numbers Show	What Must Be Protected	First Action
Cost of Delivery			
Cash Movement			
Receivables			
Taxes / Reserves			

Decision Framework

Use these questions to identify the decision that belongs to this session.

What financial obligation needs a clear place before it becomes urgent?

What is the strongest source of pressure in the current numbers?

What monthly review will keep this condition visible?

Implementation Blueprint

Identify the one action that will strengthen this area first. Keep the commitment clear enough to review.

Priority Area	First Action	Owner	Due Date	Review Date	Support Needed	Expected Result

Commitment

I will give the business's money a clear purpose before urgency decides where it goes.

MY SPECIFIC COMMITMENT

Signature ____________________ Date ____________________

Margin gives the owner options.

SESSION 07 / BUILD SYSTEMS

Technology

Building Systems That Serve the Work

Technology should make the work clearer, strengthen follow-through, and help the business carry routine responsibility without depending on the owner’s memory.

PRIMARY SCRIPTURE

Exodus chapter 18, verses 17 through 18

SUGGESTED TIME

60-75 minutes

Read the chapter first. Then use this session to make one clear decision, build one practical structure, and establish one review rhythm.

THE AWAKENING

Technology

Technology can make a business stronger. It can also make it harder to lead. A new system may improve communication, follow-up, reporting, or delivery. It may also become another subscription, login, or place where the truth is lost. The issue is rarely the tool itself.

Technology multiplies what is already present. A clear process becomes easier to repeat. An unclear process becomes faster confusion. The owner needs to begin with the work: what must be communicated, followed up, measured, or made visible before deciding which tool should carry it.

THE ARCHITECTURE

Most useful business technology serves one or more of three jobs. It should be chosen by the work it supports, not by the features it promises.

01

Communication

Give customers and team members a dependable place to receive the right information at the right time.

02

Follow-Up

Protect leads, proposals, projects, renewals, and customer care from being lost because someone forgot the next step.

03

Accountability

Make the condition of the work visible so the owner and team can see what is moving, stuck, late, or unclear.

04

Ownership

Assign a person who understands the purpose, maintains the system, and ensures it supports a real process.

THE RADICAL INQUIRY

Look beneath the surface.

Answer slowly. The goal is not a polished response. The goal is an honest one.

01 **What information is currently lost because it lives in personal memory, scattered messages, or informal conversations?**

Name the information that should be visible to the right person without requiring the owner to translate it.

02 **What follow-up is too dependent on good intentions?**

Look at leads, proposals, completed work, customer updates, reviews, renewals, or team commitments.

03 **What tool do we have that no longer clearly serves the work?**

Consider software, reports, meetings, or systems that add cost and complexity without a clear purpose.

Turn insight into a concrete decision.

Begin by scoring the current condition. Your score is not a verdict. It is a starting point for honest action.

Category Scorecard

Circle one response for each statement. Use the score that most honestly reflects the current condition.

Category Total: ______ / 16

Statement	Satisfaction Score
Our core systems make customer and team communication clearer.	1 2 3 4
Important follow-up does not depend only on memory or informal reminders.	1 2 3 4
The business can see key work, handoffs, and performance without searching through scattered tools.	1 2 3 4
Each important system has a clear purpose, owner, and review rhythm.	1 2 3 4

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3 = Satisfied This area is generally functioning, though it needs continued attention.	**4 = Highly Satisfied** This area is clear, intentional, measured, and supported by a repeatable rhythm.

Read Your Result

Low | 4-6

Technology may be multiplying confusion rather than capacity. The business needs to clarify the process before adding another tool.

Medium | 7-11

Some systems are helping, but the business may still have overlapping tools, unclear ownership, or inconsistent use.

High | 12-16

Technology is serving the work with purpose. Keep it useful by auditing systems as the team, process, and business needs change.

NEXT-STEP TAKEAWAY

Choose one process to simplify before you add, replace, or automate any technology.

PRACTICAL TOOL

Technology Stewardship Audit

Evaluate existing tools by the work they serve. Keep systems that improve communication, follow-up, accountability, and clear ownership.

Tool / System	What Process Does It Support?	Job: Communication, Follow-Up, or Accountability	Owner	Keep, Simplify, Replace, or Remove?

Before adding a tool: What problem does it solve? Does it simplify or complicate? Can the team adopt it? Will it make the work more visible and dependable?

Decision Framework

Use these questions to identify the decision that belongs to this session.

What process needs clarity before technology can help?

What tool needs a clear owner and purpose?

What system should be simplified, replaced, or removed?

Implementation Blueprint

Identify the one action that will strengthen this area first. Keep the commitment clear enough to review.

Priority Area	First Action	Owner	Due Date	Review Date	Support Needed	Expected Result

Commitment

I will use technology to support the work, not to create more places for information and responsibility to be lost.

MY SPECIFIC COMMITMENT

Signature ____________________ Date ____________________

Technology should make the work clearer and help the business keep its promises.

SESSION 08 / CREATE STABILITY

Owner Pay

Creating Stability at Home and in the Business

Owner pay is part of the business model. Regular, documented compensation helps the business and household become clearer and more stable.

PRIMARY SCRIPTURE

First Timothy chapter 5, verse 18

SUGGESTED TIME

60-75 minutes

Read the chapter first. Then use this session to make one clear decision, build one practical structure, and establish one review rhythm.

THE AWAKENING

Owner Pay

Many owners build companies that depend on their sacrifice while failing to support them consistently. They take what is left after payroll, vendors, taxes, and the next urgent expense. That pattern may be necessary in an early or difficult season. It should not become the permanent design of the business.

Owner pay reveals whether the model can support the person carrying its responsibility. It creates a clearer separation between business performance and household needs. It also helps the owner face the real questions of revenue, pricing, costs, and capacity when the current model cannot provide consistent compensation.

THE ARCHITECTURE

Owner compensation becomes steadier when the business distinguishes the owner's work, the company's needs, and the household's needs.

01

Role

Clarify what the owner actually does in the business and what responsibility the role carries.

02

Compensation

Create a regular, documented pay rhythm that is connected to the business's real capacity and entity structure.

03

Business Health

Use owner pay as a test of whether revenue, pricing, costs, and financial discipline are strong enough.

04

Household Stability

Let the household receive income through an expected rhythm instead of irregular transfers and constant uncertainty.

THE RADICAL INQUIRY

Look beneath the surface.

Answer slowly. The goal is not a polished response. The goal is an honest one.

01 **What is the business currently asking me to subsidize personally?**

Look at unpaid labor, personal savings, random withdrawals, delayed household needs, or personal guarantees.

02 **What does the owner role require the business to support?**

Consider the actual work, responsibility, tax structure, and reasonable compensation guidance from qualified professionals.

03 **What would become clearer if owner pay were regular, documented, and distinct from profit or personal spending?**

Name the pressure that would be reduced in the business or household.

Turn insight into a concrete decision.

Begin by scoring the current condition. Your score is not a verdict. It is a starting point for honest action.

Category Scorecard

Circle one response for each statement. Use the score that most honestly reflects the current condition.

Category Total: ________ / 16

Statement	Satisfaction Score
I know the role the owner performs and the compensation the business should plan to support.	1 2 3 4
Owner pay is regular, documented, and distinct from random draws or personal spending.	1 2 3 4
I can see whether the current business model can support compensation consistently.	1 2 3 4
Owner pay, profit, operating needs, and household spending are treated as distinct categories.	1 2 3 4

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Read Your Result

Low | 4-6

The owner may be carrying the business without a dependable compensation structure. The true condition of the model may be hidden by personal sacrifice.

Medium | 7-11

The owner is being paid, but the rhythm or documentation may still be inconsistent. The business needs a clearer compensation plan and review point.

High | 12-16

Owner pay is part of the business design. Protect the discipline by reviewing compensation as revenue, profitability, and the owner role change.

NEXT-STEP TAKEAWAY

Decide what one step will make owner compensation more visible, regular, and connected to the actual business model.

PRACTICAL TOOL

Owner Pay Stability Review

Make owner compensation visible without turning the workbook into tax or legal advice. Use the snapshot to prepare for a conversation with your accountant, advisor, or leadership team.

Compensation Question	Current Answer	What Needs to Be Decided
What work does the owner perform?		
What is the planned regular pay rhythm?		
What is the current actual pay rhythm?		
What business condition limits consistent pay?		
What professional guidance is needed?		

Annual Owner Pay Planning	Amount
Planned Annual Compensation	
Planned Monthly Compensation	Planned Annual Compensation / 12 =
Actual Monthly Compensation	
Difference to Address	

Important: Entity structure, tax treatment, reasonable compensation, payroll, and distribution decisions require qualified tax and legal guidance for your specific circumstances.

Decision Framework

Use these questions to identify the decision that belongs to this session.

What pay rhythm would create greater stability?

What business condition must improve for that pay rhythm to be sustainable?

Who needs to be involved in setting and reviewing the plan?

Implementation Blueprint

Identify the one action that will strengthen this area first. Keep the commitment clear enough to review.

Priority Area	First Action	Owner	Due Date	Review Date	Support Needed	Expected Result

Commitment

I will treat owner pay as part of the business model, not an afterthought when money happens to be available.

MY SPECIFIC COMMITMENT

Signature ______________________ Date ______________________

The business should be designed to support the person responsible for leading it.

SESSION 09 / EXECUTE WITH RHYTHM

The Ninety-Day Rhythm

Turning Direction into Weekly Action

A ninety-day rhythm turns direction into a manageable season of focused work, weekly ownership, and honest review.

PRIMARY SCRIPTURE

Psalm chapter 90, verse 12

SUGGESTED TIME

60-75 minutes

Read the chapter first. Then use this session to make one clear decision, build one practical structure, and establish one review rhythm.

THE AWAKENING

The Ninety-Day Rhythm

A clear plan has to enter the ordinary life of the company. It has to reach the calendar, shape meetings, and affect what the team works on this week. Many plans lose their influence because they remain too far from daily work. The owner knows where the company should go, but the work is still pulled in different directions by urgent demands.

Ninety days is long enough to make meaningful progress and short enough to keep the business focused. The rhythm creates a bridge between the larger direction and the weekly work. It helps the owner choose what matters now, give it ownership, and return to it before the next urgent issue replaces it.

THE ARCHITECTURE

The rhythm is simple on purpose. It gives the business a repeatable way to choose, carry, review, and learn from the work of the current season.

01

Direction

Begin with the larger plan. Choose only priorities that support the future the business is building.

02

Ninety-Day Outcomes

Define a small number of clear outcomes that would meaningfully strengthen the business during this season.

03

Weekly Review

Return to the work each week. Identify what moved, what is blocked, and what needs a decision.

04

Quarterly Learning

Close the season honestly. Recognize progress, name unfinished work, and decide what belongs in the next ninety days.

THE RADICAL INQUIRY

Look beneath the surface.

Answer slowly. The goal is not a polished response. The goal is an honest one.

01 **What important work keeps getting displaced by urgency?**

Name the work that would strengthen the business if it had a clear owner and a weekly review point.

02 **What are we trying to accomplish in the next ninety days that can be stated clearly?**

Avoid activity language. Describe the condition that should be true when the season ends.

03 **Where is ownership unclear?**

Identify the priority that is important to everyone but carried by no one.

Turn insight into a concrete decision.

Begin by scoring the current condition. Your score is not a verdict. It is a starting point for honest action.

Category Scorecard

Circle one response for each statement. Use the score that most honestly reflects the current condition.

Category Total: ________ / 16

Statement	Satisfaction Score
The business has a small number of clear priorities for the current ninety-day season.	1 2 3 4
Each priority has an owner, a next step, and a way to recognize progress.	1 2 3 4
We review priorities weekly rather than only when something becomes urgent.	1 2 3 4
We close each season by learning from what moved, what stalled, and what needs attention next.	1 2 3 4

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Read Your Result

Low | 4-6

The business may be carrying too many priorities at once, or the plan may not have reached the actual calendar and work of the team.

Medium | 7-11

The priority list exists, but ownership, weekly review, or end-of-season learning may not yet be dependable.

High | 12-16

The business has a usable execution rhythm. Protect it by refusing to allow every new idea to become a current priority.

NEXT-STEP TAKEAWAY

Choose the one ninety-day outcome that will create the most strength, then give it a weekly home.

PRACTICAL TOOL

Ninety-Day Action Map

Turn a priority into visible weekly action. Use one map for each major priority you choose for the next season.

Ninety-Day Priority	What Must Be True by Day 90?

Weeks	Milestone or Action	Owner	What Could Block This?	Decision / Support Needed
Weeks 1-2				
Weeks 3-4				
Weeks 5-6				
Weeks 7-8				
Weeks 9-10				
Weeks 11-12				

Weekly review prompt: What moved? What is stuck? What decision is required? Who owns the next action before the next review?

Decision Framework

Use these questions to identify the decision that belongs to this session.

What is the one outcome that most deserves focus this season?

What must happen this week for that outcome to move?

What will we decline, delay, or delegate to protect the priority?

Implementation Blueprint

Identify the one action that will strengthen this area first. Keep the commitment clear enough to review.

Priority Area	First Action	Owner	Due Date	Review Date	Support Needed	Expected Result

Commitment

I will turn direction into weekly action by choosing fewer priorities and reviewing them with consistency.

MY SPECIFIC COMMITMENT

Signature ____________________ Date ____________________

Direction becomes useful when it enters the calendar.

SESSION 10 / BUILD CAPACITY

Capital and Capacity

Using Resources to Build, Not to Bail Out

Capital should support a clear plan and a proven opportunity, not hide a condition the business needs to face honestly.

PRIMARY SCRIPTURE

Proverbs chapter 24, verse 27

SUGGESTED TIME

60-75 minutes

Read the chapter first. Then use this session to make one clear decision, build one practical structure, and establish one review rhythm.

THE AWAKENING

Capital and Capacity

Every owner eventually faces a decision that requires more resources than the business has available in the moment. A larger contract may require equipment, inventory, labor, or working cash. A growing team may need more space, better systems, or stronger leadership. Capital can help the business move forward. It can also magnify a problem that was already present.

The question is not merely whether the business can access money. The more important question is whether the resources will strengthen the work or only delay a problem that needs to be addressed. Capital should follow a plan, a clear use, and a realistic understanding of what the business can carry.

THE ARCHITECTURE

A sound capital decision considers the purpose of the investment and the business's financial and operational ability to carry what comes with it.

01

Purpose

Name the opportunity, problem, or capacity constraint the capital will address.

02

Proven Work

Confirm that the investment supports work, demand, or a process the business already understands.

03

Financial Capacity

Review cash flow, repayment, margin, timing, and the effect of a slower-than-expected outcome.

04

Operational Capacity

Assess people, systems, delivery, leadership, and customer experience before adding more responsibility.

THE RADICAL INQUIRY

Look beneath the surface.

Answer slowly. The goal is not a polished response. The goal is an honest one.

01 **What problem am I hoping capital will solve?**

Be specific. Is the real constraint capital, demand, pricing, people, systems, or an unresolved financial pattern?

02 **What evidence shows that this investment supports a proven direction?**

Look for customer demand, healthy delivery, current margins, team readiness, and a clear business case.

03 **What would happen if the expected return takes longer than planned?**

Consider cash flow, payment obligations, people, customers, and the owner’s ability to lead through a slower season.

THE MASSIVE ACTION BLUEPRINT

Turn insight into a concrete decision.

Begin by scoring the current condition. Your score is not a verdict. It is a starting point for honest action.

Category Scorecard

Circle one response for each statement. Use the score that most honestly reflects the current condition.

Category Total: ______ / 16

Statement	Satisfaction Score
I can clearly explain the purpose of any capital or financing decision under consideration.	1 2 3 4
I understand the financial and operational capacity required to carry an investment or obligation.	1 2 3 4
The business builds access and options before pressure becomes urgent.	1 2 3 4
I can distinguish a building decision from a decision that only delays a hard truth.	1 2 3 4

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Read Your Result

Low | 4-6

Capital may be seen as the answer before the underlying constraint has been identified. Pressure can lead to borrowing that increases the problem.

Medium | 7-11

The owner sees the need for discipline, but the business may still need clearer financial evidence, lender relationships, or capacity analysis.

High | 12-16

Capital is being considered as a tool beneath wise direction. Keep the discipline by documenting purpose, risk, and the conditions required for success.

NEXT-STEP TAKEAWAY

Before pursuing capital, identify the real constraint and write down what must be true for the investment to strengthen the business.

PRACTICAL TOOL

Build or Bail Out Decision Filter

Use this page before borrowing, investing, expanding, buying equipment, hiring for growth, or making any decision that adds financial weight.

Decision Question	Your Answer
What specific opportunity or constraint is in front of us?	
What work, demand, or process proves this is a building decision?	
What will the resources be used for?	
What is the financial obligation, timing, and downside scenario?	
What operational capacity must be in place?	
What must be true before we proceed?	
Decision: Build Now / Build Capacity First / Decline	

Guardrail: Capital can accelerate a business. It cannot create a healthy foundation where one does not exist.

Decision Framework

Use these questions to identify the decision that belongs to this session.

What is truly limiting the business right now?

What capacity must be built before this opportunity can be carried well?

What evidence would make the decision stronger?

Implementation Blueprint

Identify the one action that will strengthen this area first. Keep the commitment clear enough to review.

Priority Area	First Action	Owner	Due Date	Review Date	Support Needed	Expected Result

Commitment

I will use resources to strengthen a clear direction, not to postpone the work of facing what is true.

MY SPECIFIC COMMITMENT

Signature ______________________ Date ______________________

Capital is valuable. Capacity is essential.

SESSION 11 / PREPARE WHAT LASTS

Wealth and Legacy

Preparing What You Build to Carry Forward

Legacy is built through ordinary decisions that make the business, its people, its value, and its purpose more understandable and transferable over time.

PRIMARY SCRIPTURE

Psalm chapter 145, verse 4

SUGGESTED TIME

75-90 minutes

Read the chapter first. Then use this session to make one clear decision, build one practical structure, and establish one review rhythm.

THE AWAKENING

Wealth and Legacy

A business can create value in many forms. It may produce income, provide meaningful work, build customer trust, develop people, create systems, and generate resources that can serve the future. Each form of value carries a question: What will happen when the owner is no longer carrying the work in the same way?

The future is being shaped before a sale, retirement, succession, or transition becomes immediate. Every process that remains only in the owner's memory makes a future transition harder. Every leader developed, record clarified, and system strengthened gives the business a better chance to carry responsibility beyond one person.

THE ARCHITECTURE

Preparing what lasts requires attention to the company's value, the people who carry it, the resources it creates, and the wisdom that must be transferred.

01

Business Value

Make the company's offers, customer relationships, systems, financial story, and operating strengths visible and understandable.

02

People

Develop leaders before they are needed. Teach judgment, values, and responsibility, not only tasks.

03

Resources

Consider how value created through the business can be protected and directed with wise tax, legal, financial, and insurance counsel.

04

Future Transfer

Begin honest conversations about ownership, leadership, family expectations, succession, and continuity before urgency makes them harder.

THE RADICAL INQUIRY

Look beneath the surface.

Answer slowly. The goal is not a polished response. The goal is an honest one.

01 **What value has the business created that would be difficult for another person to understand today?**

Think beyond cash: systems, relationships, customer trust, knowledge, people, reputation, and decision-making patterns.

02 **Where is the business too dependent on one person?**

Name the relationship, process, authority, or information that needs to become more visible and transferable.

03 **What conversation about the future have I delayed?**

Consider leadership, succession, family expectations, ownership, continuity, legal documents, or legacy purpose.

Turn insight into a concrete decision.

Begin by scoring the current condition. Your score is not a verdict. It is a starting point for honest action.

Category Scorecard

Circle one response for each statement. Use the score that most honestly reflects the current condition.

Category Total: ________ / 16

Statement	Satisfaction Score
The business can clearly explain what it does, how it creates value, and what makes the work profitable.	1 2 3 4
Important relationships, systems, records, and responsibilities are not held only in one person's memory.	1 2 3 4
We are developing people who can carry meaningful responsibility and understand the principles behind the work.	1 2 3 4
I have begun the practical conversations and professional review required for future transition and continuity.	1 2 3 4

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Read Your Result

Low | 4-6

The business may have value, but much of it is still held in the owner's memory, relationships, and daily involvement. Transition would be difficult today.

Medium | 7-11

The owner sees the future need, but documentation, leader development, and practical continuity conversations need a more deliberate rhythm.

High | 12-16

The business is becoming more understandable and transferable. Protect this strength by reviewing it as people, assets, ownership, and future goals change.

NEXT-STEP TAKEAWAY

Choose one part of the business that must become more transferable, then begin documenting, teaching, or discussing it.

PRACTICAL TOOL

Continuity and Legacy Map

Make the work visible before transition becomes urgent. This page is a starting point for the owner's conversations with key leaders and qualified advisors.

Legacy Area	What Exists Today?	What Is Held Only in My Head?	Who Could Carry More?	First Step Toward Continuity
Customer Relationships				
Key Processes				
Financial Story				
Leadership and Authority				
Ownership / Future Transfer				

Important: Legal structures, ownership agreements, estate plans, insurance, beneficiary designations, and tax strategy require qualified counsel tailored to your circumstances.

Decision Framework

Use these questions to identify the decision that belongs to this session.

What must become more understandable before someone else can carry it?

Who should be developed before a future transition requires them?

What conversation or professional review should happen this quarter?

Implementation Blueprint

Identify the one action that will strengthen this area first. Keep the commitment clear enough to review.

Priority Area	First Action	Owner	Due Date	Review Date	Support Needed	Expected Result

Commitment

I will prepare the business, its people, and its resources to carry responsibility beyond my direct involvement.

MY SPECIFIC COMMITMENT

Signature ______________________ Date ______________________

Legacy is built through ordinary decisions made over time.

SESSION 12 / LEAD THE WHOLE SYSTEM

Lead the Numbers

Becoming the Steward of the Whole System

The owner does not need to do every financial task, but he must stay close enough to the condition of the business to lead it with responsibility.

PRIMARY SCRIPTURE

First Corinthians chapter 4, verse 2

SUGGESTED TIME

75-90 minutes

Read the chapter first. Then use this session to make one clear decision, build one practical structure, and establish one review rhythm.

THE AWAKENING

Lead the Numbers

A business owner can spend most of the day close to the work while remaining distant from the condition of the business. The numbers may live inside software that is rarely opened, in reports reviewed only at tax time, or with advisors who are expected to manage information the owner has not learned to lead.

Leading the numbers does not mean becoming an accountant. It means accepting that the numbers are part of the language of the business. They show what the company is producing, consuming, strengthening, and delaying. The owner must understand enough to ask good questions and make decisions from truth rather than from fear or assumption.

THE ARCHITECTURE

The Four Pillars become an operating system when the owner establishes a repeatable review rhythm that connects numbers to leadership decisions.

01

Plan

Compare the current calendar, budget, and priorities to the future the business says it is building.

02

Revenue

Watch the quality and source of sales, customer mix, conversion, delivery capacity, and concentration risk.

03

Finance

Review revenue, cost, cash movement, receivables, obligations, margin, and available capacity.

04

Technology

Confirm that systems make important work, follow-up, communication, and accountability visible.

THE RADICAL INQUIRY

Look beneath the surface.

Answer slowly. The goal is not a polished response. The goal is an honest one.

01 **What number or report do I avoid because it may challenge the story I want to believe?**

Name the financial or operational truth that needs your attention.

02 **What decision would become clearer if I had better visibility?**

Consider pricing, hiring, spending, capital, capacity, customer mix, or owner pay.

03 **Where have I delegated a task but abdicated leadership responsibility?**

Identify the report, conversation, or review rhythm that needs you to stay connected to the outcome.

Turn insight into a concrete decision.

Begin by scoring the current condition. Your score is not a verdict. It is a starting point for honest action.

Category Scorecard

Circle one response for each statement. Use the score that most honestly reflects the current condition.

Category Total: ________ / 16

Statement	Satisfaction Score
I have a dependable weekly, monthly, quarterly, and annual rhythm for leading the business.	1 2 3 4
I understand the few numbers that tell the financial and operational condition of the company.	1 2 3 4
I use the Four Pillars to connect plan, revenue, finance, and technology to real decisions.	1 2 3 4
I delegate financial and operational tasks without disconnecting from responsibility for the outcome.	1 2 3 4

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3 = Satisfied This area is generally functioning, though it needs continued attention.	**4 = Highly Satisfied** This area is clear, intentional, measured, and supported by a repeatable rhythm.

Read Your Result

Low | 4-6

The owner may be close to the work but distant from the business’s condition. Review is likely happening only when pressure rises.

Medium | 7-11

The reports and habits exist, but the rhythm may be inconsistent or disconnected from the decisions of the business.

High | 12-16

The owner is leading the whole system with visibility and responsibility. Keep the rhythm useful by focusing on the numbers that lead to better questions and better decisions.

NEXT-STEP TAKEAWAY

Choose one review rhythm to establish or strengthen first, then decide what number, question, and action will make it useful.

PRACTICAL TOOL

Owner Operating Dashboard

Identify the few measures that help you lead the business. Use the dashboard as a starting point, then refine it with your team, accountant, controller, or advisor.

Review Rhythm	What I Will Review	Question It Should Answer	Decision It May Inform	Owner / Meeting
Weekly				
Monthly				
Quarterly				
Annual				

Core Measure	Current Number	Trend / Context	Question It Raises

Dashboard rule: A useful number should lead to a useful question. A useful question should lead to a wiser decision.

Decision Framework

Use these questions to identify the decision that belongs to this session.

What do I need to see every week?

What must be reviewed monthly before it becomes a surprise?

What is the next decision the numbers need to inform?

Implementation Blueprint

Identify the one action that will strengthen this area first. Keep the commitment clear enough to review.

Priority Area	First Action	Owner	Due Date	Review Date	Support Needed	Expected Result

Commitment

I will lead the numbers with enough attention, humility, and discipline to carry the whole system faithfully.

MY SPECIFIC COMMITMENT

Signature ______________________ Date ______________________

The business does not need a perfect owner. It needs an owner willing to pay attention and lead with responsibility.

THE PROFIT WAY FIELDBOOK

Return to the work.

These reusable pages turn the framework into a dependable weekly, monthly, quarterly, and annual rhythm.

FIELDBOOK TOOL 01

The Four Pillars at a Glance

Pillar	Core Question	What It Protects	Review Rhythm
Plan	What are we building, and what matters now?	Direction and focus	Quarterly / Weekly
Revenue	Which work creates healthy strength?	Customer value and capacity	Weekly / Monthly
Finance	What must be protected before pressure arrives?	Margin and wise resource use	Weekly / Monthly
Technology	How can systems serve the work?	Communication, follow-up, accountability	Monthly / Quarterly

Use this page: Bring it to a leadership meeting, coaching conversation, or quarterly planning session. Let the questions guide the conversation.

FIELDBOOK TOOL 02

Ninety-Day Planning Card

Direction	Your Answer
Current Season	
What are we building?	
Three Priority Outcomes	
What will we not pursue?	

Priority	Owner	First Action	Due Date	Weekly Review

FIELDBOOK TOOL 03

Weekly Business Review

Weekly Review Question	Notes / Decision
What moved forward this week?	
What is stuck or unclear?	
What customer, team, or financial issue needs a decision?	
What priority must move next week?	
Who owns the next action?	

Suggested rhythm: 30 to 60 minutes. Begin with the current priorities, not the longest list of activity.

FIELDBOOK TOOL 04

Monthly Financial Review

Review Area	What Is True?	Question or Decision
Revenue and Sales		
Cost of Delivery		
Operating Expenses		
Cash and Receivables		
Upcoming Obligations		
Tax, Profit, and Reserves		
Owner Pay		

Before the meeting ends: Identify one action, owner, and review date for the area creating the greatest pressure.

FIELDBOOK TOOL 05

Quarterly Business Review

Quarterly Review	Your Notes
What did we intend to strengthen?	
What actually improved?	
What remained unfinished and why?	
What did the business teach us about customers, capacity, or financial strength?	
What belongs in the next ninety-day season?	

FIELDBOOK TOOL 06

Build, Wait, or Decline Filter

Decision	Question
Build Now	Does this fit our direction, serve a proven need, and match current capacity?
Build Capacity First	What people, process, financial strength, or visibility must exist before we proceed?
Wait	What evidence, clarity, or timing do we need before deciding?
Decline	Does this work pull us away from our core direction or create more pressure than strength?

Opportunity or Decision	Build / Wait / Decline	Why	Next Review Date

FIELDBOOK TOOL 07

Capital Decision Filter

Question	Your Answer
What specific problem or opportunity are we addressing?	
What evidence proves this supports a clear direction?	
What financial and operational capacity is required?	
What happens if the return takes longer than expected?	
What must be true before we proceed?	
Decision and Review Date	

FIELDBOOK TOOL 08

Continuity Conversation Map

Conversation	Who Needs to Be Involved?	First Next Step	Review Date
Key Relationships			
Critical Processes			
Leadership and Authority			
Financial and Operating Records			
Ownership / Legacy Direction			

Use qualified counsel: Legal, tax, financial, insurance, and succession questions should be reviewed with professionals who understand your circumstances.

FIELDBOOK TOOL 09

Annual Owner Review

Annual Review Prompt	Your Notes
What became stronger this year?	
What created the greatest pressure?	
Which customer, revenue, or capacity decision needs attention?	
What did the numbers reveal?	
What leader or system needs development?	
What must be prepared before next year becomes urgent?	
What is the next year's direction?	

FINAL RE-SCORE ASSESSMENT

Make progress visible.

Return to the scorecards after you have worked through the sessions and used the Fieldbook rhythms. Compare the closing condition with the opening picture.

Session	Category	Closing Score	What Still Needs Attention?
01	Stewardship Begins with Ownership	________	
02	Clarity Comes Before Direction	________	
03	The Whole Field	________	
04	Plan	________	
05	Revenue	________	
06	Finance	________	
07	Technology	________	
08	Owner Pay	________	
09	The Ninety-Day Rhythm	________	
10	Capital and Capacity	________	
11	Wealth and Legacy	________	
12	Lead the Numbers	________	

COMPARISON REFLECTION

Carry the work into the next season.

Reflection	Your Answer
What strengthened?	
What became clearer?	
What pressure remains?	
What habit must continue?	
What is the next ninety-day priority?	
Who needs to be part of the next season?	

Build with clarity. Protect margin before pressure arrives. Lead the work with purpose.

NOTES

Use the space.

Use these pages for notes, reflection, coaching, planning, or discussion.

NOTES 01

Use this page for notes, reflection, coaching, planning, or discussion.

Use this page for notes, reflection, coaching, planning, or discussion.

NOTES 03

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NOTES 04

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NOTES 05

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NOTES 08

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