

CONTRACTOR SCALER HUB · TOOLKIT

Get Out of the Owner Bottleneck

The course's checklists, worksheets and templates in one file: 3 to print or fill in on your phone, and 2 spreadsheets sent with it.

MotionOps

How to use this toolkit

One file per lesson of **Get Out of the Owner Bottleneck**, in the order of the course. Each starts with the lesson it belongs to and what to do with it. The tinted rows are the lessons' examples; your numbers go in the blank ones.

Use it lesson by lesson, or go straight to the one you need this week. Nothing here needs an account, and every file says when to check a number with an accountant, an attorney, your licensing board or an insurance agent.

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Spreadsheet · owner-bottleneck-audit.xlsx

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LESSON 1 · SPREADSHEET · OWNER-BOTTLENECK-AUDIT.XLSX

Owner Bottleneck Audit

Spreadsheet owner-bottleneck-audit.xlsx came with this toolkit. Open it in Excel, Numbers or Google Sheets (File > Import). Yellow cells are yours to type; gray cells calculate. This page says what is in it.

One week of interruptions

One normal working week, not the week of a holiday or a big emergency. Log every request, question and decision that reaches you, including texts, hallway questions and "just checking" calls, and any work you did that someone else could have done (pick Me under Who asked). Don't fix anything this week: answer as you normally would and write it down. If you can't log in the moment, catch up twice a day, at lunch and before you go home. Fill in the cause for every row on Friday. The first 7 rows are the lesson's example, made up to show the method: replace them with yours.

- The log: one row per request, question or decision

Friday: sort the log three ways

This tab reads the Interruption log tab: by cause, by repeat and by minutes. The biggest group is your first target. Every repeat is a question you'll answer again next week unless something changes.

- What to review at the end of the week: requests, repeats and minutes by cause
- The week in numbers
- Circle the three repeat items that took the most time

LESSON 2 · WORK ON YOUR BUSINESS, NOT IN IT: WHAT A CONTRACTOR SHOULD KEEP AND WHAT TO HAND OFF

Keep or Hand Off Worksheet

For lesson 2. Take your interruption log from lesson 1 (or last week's calendar, texts and call history) and sort every item into four groups. Then write down three answers and prepare the one responsibility you'll hand off first.

1. The four groups and their tests

Group	Test	Examples
Keep: real owner decisions	Would a wrong call here hurt the business for months, not days?	Pricing policy, which kind of work to chase, who you hire and let go, a serious customer dispute, your bank and insurance decisions
Hand off: repeatable work with rules	Could you write down how to do it on one page?	Confirming tomorrow's appointments, placing jobs on the calendar within your rules, ordering materials from an approved list, sending invoices for finished work
Write it down once: the answer exists, it just isn't written	Is this the same question as last week?	What the customer picked, what you charge for a standard job, the gate code, how you close out a job
Stop: nobody should do it, or not at your level	What would actually happen if this stopped next week? If the honest answer is "nothing much," stop it.	Driving to the supplier for something they would deliver, double-checking small estimates that are never wrong, a weekly report nobody reads

2. Sort the log, one line at a time

The tinted rows are the lesson's example, a remodeler with two crews, made up to show the method.

Item from the log	Group	Why
Example "Which tile did the customer pick?"	Write it down once	The answer exists; the crew just can't see it
Example "What do we charge for a vanity swap?"	Write it down once	A standard job needs a written price, not a phone call
Example "Can we move the Henderson start to Thursday?"	Hand off	Rescheduling repeats every week and can follow rules
Example "Can we add an outlet for the customer?"	Hand off	Small change orders can be approved by the crew lead within a limit

Item from the log	Group	Why
Example "Can the invoice go out before the punch list is done?"	Write it down once	This is a closeout rule the office needs once
Example Driving to the supplier on Wednesday	Stop	The supplier delivers; the owner was filling a gap in ordering
Example "Should we bid the commercial job?"	Keep	It changes what the company does

Count each group. In the example, out of seven items: one Keep, three Write it down once, one Stop, two Hand off.

KEEP	HAND OFF	WRITE IT DOWN ONCE	STOP

3. Split mixed tasks: the direction you keep, the execution you hand off

Task	Direction I keep	Execution I hand off
Example Pricing	Target margins and how we price new kinds of work	Pricing standard jobs from the price list
Example Scheduling	Which jobs get priority and how many crews we run	Putting jobs on the calendar and moving them within the rules
Example Customer service	Warranty and refund policy, and serious complaints	Routine updates and callbacks
Example Purchasing	Which suppliers we use and our account terms	Ordering for scheduled jobs

Task	Direction I keep	Execution I hand off

EXCEPTIONS THAT STILL COME TO ME, WRITTEN AS CLEAR RULES. "ANYTHING OVER OUR NORMAL JOB SIZE COMES TO ME" IS A CLEAR RULE; "CALL ME IF IT'S WEIRD" IS NOT.

4. Write it down once: the three most common questions

Write each answer where the people who need it can find it. These need nobody to take them over, and they're usually the quickest win: do them this week, alongside your one handoff.

Question that keeps coming back	The answer	Where it's written now

5. Pick one responsibility to hand off

One from your Hand off group, not ten. A good first one:

- [ ] **Repeats every week,** so the person gets practice fast
- [ ] **Costs me real time,** so I feel the difference
- [ ] **Can be written as rules,** so it doesn't depend on my judgment
- [ ] **Has someone ready** to take it, with the time to do it
- [ ] **Is fixable when it goes wrong,** so a mistake costs a phone call, not a customer

THE RESPONSIBILITY (EXAMPLE: RESCHEDULING WITHIN RULES)

HANDED TO (EXAMPLE: THE OFFICE COORDINATOR)

6. What they need before they take it over

Delegation fails when the task moves but what makes it doable stays with you. The authority row is where most handoffs go wrong: lesson 3 sets those limits.

Needs	The question to ask	Example: scheduling	For my handoff
Skills	Can they do the work, or what training do they need?	The coordinator has used the calendar but hasn't planned a whole week	
Information	Where is everything you know about it?	Which crew handles which jobs, typical job durations, who's off	
Authority	What can they decide alone, and when do they call you?	They can move a job up to three days if the customer agrees; anything longer comes to you	
Time	Does it fit in their week? What comes off their plate?	Filing supplier receipts moves to someone else, so the time is really there	

IF NOBODY ON THE TEAM HAS TIME FOR THE SCHEDULING, CUSTOMER CALLS AND PAPERWORK IN YOUR LOG, NOTE THE GAP: THE ROLE YOU NEED MAY BE AN OFFICE COORDINATOR BEFORE ANOTHER CREW MEMBER.

What to review next week

How many of the same execution tasks still reached you, compared with this week's log. The number should start to fall once the written answers are in place.

SAME EXECUTION TASKS THAT REACHED ME THIS WEEK

SAME EXECUTION TASKS THAT REACHED ME NEXT WEEK

LESSON 3 · DELEGATION MATRIX FOR CONTRACTORS: HOW TO DELEGATE DECISIONS, NOT JUST TASKS

Delegation Matrix

For lesson 3. Sit down with the person who'll own the responsibility you picked in lesson 2. Write one decision agreement for each decision that comes with it, test it on three real cases, then collect the agreements in your delegation matrix.

1. The decisions behind the task

Handing over a task isn't enough. To get it off your desk for good, hand over the decisions that come with it, with limits.

A task	A decision that comes with it
Example Enter the job on the calendar	Move a job when the customer asks
Example Order materials for next week	Switch to a different supplier when one is out of stock
Example Write up the change order	Approve the extra work on site
Example Send the invoice	Agree to split the payment

2. Five levels of authority

Level	What the person does	Example
1. Do as asked	You decide, they carry it out	You pick the new date, they call the customer
2. Recommend	They look into it and suggest; you decide	"Thursday works for crew 2. Should I book it?"
3. Decide, check before acting	They decide, tell you and act unless you object	"I'm moving it to Thursday unless you say otherwise"
4. Decide and act, tell you after	They act and let you know	"Moved Henderson to Thursday, crew 2. Customer confirmed."
5. Decide and act	They act; you see it in your regular review	Nothing reaches you. It shows up on the weekly job review

Start at level 3 and move to level 4 after a few weeks of good decisions. Level 5 is for decisions that are routine, low risk and well understood. If someone keeps calling about a decision you handed over, check which level you actually gave: often it was level 2 without anyone saying so.

3. The decision agreement: one per decision

Fill in the seven parts together. They'll spot gaps you can't see from the owner's chair. One agreement is one row of your delegation matrix.

1. THE DECISION, IN PLAIN WORDS ("MOVE A SCHEDULED JOB TO A NEW DATE")

2. WHO OWNS IT: ONE PERSON, BY ROLE, NOT "THE OFFICE"

3. LEVEL (START AT 3)

4. INFORMATION THEY USE TO DECIDE WELL, AND WHERE IT LIVES

5. THEY CAN DECIDE ALONE WHEN: THE LIMITS. BE SPECIFIC: DAYS, AMOUNTS, JOB TYPES.

6. THEY CALL ME WHEN: ANYTHING OUTSIDE THE LIMITS, PLUS THE SITUATIONS THAT ARE RISKY EVEN INSIDE THEM

7. HOW IT'S RECORDED AND SHARED: WHO NEEDS TO KNOW, AND WHERE THE DECISION IS WRITTEN DOWN SO THE OFFICE AND THE FIELD SEE THE SAME THING

REVIEW DATE, TWO TO FOUR WEEKS OUT

AGREED BY, BOTH OF US, ON

Two filled-in agreements

A remodeling company with two crews. **The limits are examples. Set your own.**

Part	Example 1: rescheduling, handed to the office coordinator	Example 2: small change orders, handed to the crew lead
Example Decision	Move a scheduled job to a new date, or swap jobs between crews	Agree to extra work the customer asks for on site
Example Owner	Office coordinator	Crew lead on the job

Part	Example 1: rescheduling, handed to the office coordinator	Example 2: small change orders, handed to the crew lead
Example Level	3 for the first two weeks, then 4	3 for the first five change orders, then 4
Example Information	The shared schedule, which crew can do which work, typical job durations, who's off	The price list, the approved scope, the change order process
Example Can decide alone when	The move is 3 working days or less; the customer agrees; a crew with the right skills is free; the price doesn't change	The extra is on the price list; it's under $500 (the owner's chosen limit in this example); it doesn't change the schedule by more than half a day
Example Calls the owner when	The move is longer than 3 working days; it affects an inspection or a subcontractor's date; it needs overtime; the customer is upset or talks about cancelling	It's over $500 or not on the price list; it touches structure, permits or inspections; the customer disputes the price
Example Recorded and shared	Updated on the schedule the same day; the crew lead gets told before the end of the day; a note on the job saying why it moved	Change order written, priced and signed by the customer **before** the work starts; the office is told the same day so it gets invoiced
Example Review	Two weeks from today	After the first five change orders

4. Choosing a limit like $500

There's no right number for every business. Pick an amount that:

- [ ] I could absorb if the decision went wrong
- [ ] Covers the small extras that come up most often
- [ ] Fits the person's experience
- [ ] Starts lower; I raise it once I've seen a few weeks of good calls

THE LIMIT WE'RE STARTING WITH

DATE WE LOOK AT RAISING IT

5. Walk through three real cases

Pick three from the last month and ask: "What would you have done here?" If their answers match yours, the limits are clear. If they don't, fix the wording.

Real case from the last month	What they would have done	What I would have done	Match?

6. Your delegation matrix

Start with three or four decisions, not twenty, and include what **doesn't** move, so nobody guesses. The tinted rows are examples, not recommendations for your business.

Decision	Owner	Level	Can decide alone when	Calls the owner when	Recorded where	Review
Example Move a scheduled job	Office coordinator	3 → 4	≤ 3 working days, customer agrees, crew free	Longer move, inspection or sub affected, unhappy customer	Schedule + job note	In 2 weeks
Example Approve a small change order	Crew lead	3 → 4	On the price list, under your limit	Over the limit, structural, disputed	Signed change order	After 5 change orders
Example Order materials for a scheduled job	Office coordinator	4	Approved supplier, matches the estimate	Over the estimate, supplier out of stock on key items	Purchase order on the job	Monthly
Example Approve a day of overtime	Crew lead	3	Job finishes that day, customer deadline at risk	More than one day, or a second crew affected	Timesheet note	Monthly
Example Send the invoice for a finished job	Office coordinator	5	Closeout checklist complete	Unbilled extras, disputed items	Invoice + job record	Weekly review
Example Offer a discount to close a sale	Estimator	2	Never alone: recommends	Every time	Note on the proposal	Quarterly

7. Tell everyone who decides now

Tell the office, the crews and anyone else who used to come to you. When someone calls you anyway, send them to the person instead of answering. The first few times feel slower; that's how the new habit forms.

> TOLD THE OFFICE ON: _____ TOLD THE CREWS ON: _____
> [Moving jobs] is [the coordinator's] call now.

8. When they make a call you wouldn't have made

- **Inside the limits:** let it stand, even if you'd have done it differently. Then ask whether the limits need to change, and change them for next time. Reversing it changes the rules without telling anyone, and they'll go back to asking about everything.
- **Outside the limits:** talk about it privately and go back over the agreement. Was the limit unclear, or was it ignored? Those need different fixes.

What to review on the review date

Look at the exceptions, not every decision. Raise the level when the calls have been good, and write the new level down.

Count	What it tells you	Number
Decisions made within the limits	These are the ones that no longer reached you	
Escalations that didn't need you	If there are many, the limits are too narrow or unclear	
Decisions that should have reached you but didn't	The limits are too wide, or the triggers are missing	

NEW LEVEL, WRITTEN DOWN

NEXT REVIEW DATE

LESSON 4 · SPREADSHEET · WEEKLY-JOB-REVIEW.XLSX

Weekly Job Review

Spreadsheet weekly-job-review.xlsx came with this toolkit. Open it in Excel, Numbers or Google Sheets (File > Import). Yellow cells are yours to type; gray cells calculate. This page says what is in it.

Active jobs: one list for office and field

Every job that's been approved and isn't paid yet goes on this one list. Every job always has an owner and a next action with a date: a job with an empty Next action is a job nobody's moving. Type the date of this week's review first: the Exceptions column checks every job against it. The 6 example rows are the lesson's, made up to show the method; replace them with your jobs.

- This week's review
- The list

The weekly review: exceptions only

Go through the list in this order. Everything that comes out of the review gets an owner and a date, written on the Active jobs list. What not to do: go through healthy jobs one by one, fix problems on the spot that someone else owns, or turn it into a meeting about everything. It's a check, not a status meeting.

- Steps 1 to 4: the exceptions on the list this week
- Step 5: next week's starts. Is every job really ready?
- Next review
- What to review each week: both numbers should fall over the first month

When the list gets updated

A list that's updated "when people remember" is out of date by Tuesday. Print this tab, walk the team through it, and add a name to each trigger. If it isn't on the job, it didn't happen.

- Update triggers for the field and the office
- The stages: the same for every job, so the list can be sorted

LESSON 5 · 30-DAY DELEGATION PLAN: HOW TO HAND OFF ONE RESPONSIBILITY WITHOUT DROPPING IT

30-Day Delegation Plan

For lesson 5. One plan per responsibility. Fill in the five decisions before day 1, put the four checkpoint dates in your calendar and the person's, and start week 1 this week. Thirty days is a planning frame, not a promise.

1. Before day 1: five decisions

1. THE RESPONSIBILITY: ONE, FROM YOUR HAND OFF GROUP IN LESSON 2, SOMETHING THAT REPEATS EVERY WEEK

2. THE OUTCOME AFTER 30 DAYS, WRITTEN AS SOMETHING YOU COULD CHECK

3. BASELINE FROM YOUR LOG: TIMES A WEEK IT REACHES YOU

MINUTES EACH TIME

PROBLEMS IT CAUSED LAST MONTH

4. THE PERSON WHO TAKES IT OVER

WHAT COMES OFF THEIR PLATE TO MAKE ROOM

5. THE LIMITS: THE DECISION AGREEMENT FROM LESSON 3 (WHAT THEY DECIDE ALONE, WHEN THEY CALL YOU)

The lesson's example, made up to show the method:
Responsibility: every workday, check that tomorrow's jobs for crew 1 are ready to start.
Outcome after 30 days: readiness checked by 3 p.m. every workday; the owner only hears about jobs that aren't ready.
Baseline: the owner checked readiness five evenings a week, about 40 minutes each; two jobs last month started late because of missing materials.

2. The checkpoints, in both calendars

Checkpoint	Date	What must be true	My calendar	Theirs
End of week 1: prepared				
End of week 2: done together				

Checkpoint	Date	What must be true	My calendar	Theirs
End of week 3: exceptions reviewed				
Day 30: transferred, extend, adjust or pause				

The example's four weeks:

Week	What happens	Checkpoint
Example 1	Owner and crew lead write the readiness checklist: materials delivered or confirmed, scope and selections clear, access arranged, permits or inspections in order, crew and equipment assigned, customer confirmed. Crew lead watches the owner do three evenings.	Friday: checklist agreed, crew lead has access to the schedule and supplier contacts
Example 2	Crew lead does the check every day by 3 p.m. and tells the owner before acting on anything not ready. Questions saved for the 4 p.m. slot.	Daily 4 p.m. slot; Friday: questions list added to the checklist
Example 3	Crew lead acts alone within limits: reorders missing materials from approved suppliers, and asks the coordinator to move a job when something can't be ready in time. Owner reviews exceptions Tuesday and Friday.	Tuesday and Friday exception reviews
Example 4	Owner compares with the baseline: evenings back, late starts down, anything missed.	Day 30: transferred, extend, adjust or pause

3. Week 1: prepare

Goal: everything the person needs exists before they start.

- [ ] The steps written on one page, in the order I actually do them
- [ ] Decision agreement written together; three recent real cases walked through
- [ ] Information gathered: lists, templates, phone numbers, where things are kept
- [ ] They watched me do it two or three times, and I explained why, not just what
- [ ] We agreed how they'll record their work, so I can see it without asking (the active-job list from lesson 4)

4. Week 2: do it together

Goal: they do the work, with you close by.

- [ ] They do it every day. I don't.

- [ ] They decide and tell me before acting (level 3)
- [ ] One fixed time a day for questions: _____ (for example 15 minutes at 4 p.m.). Urgent issues still reach me; everything else waits for it.
- [ ] Every question goes on the questions list, and its answer goes on the one-page steps, not just into the conversation

Day	Question they asked	The answer	Added to the steps

5. Week 3: review the exceptions

Goal: they act on their own; you look only at what went differently. Most fixes are a clearer limit or a missing piece of information.

- [ ] Moved to level 4: they decide, act and tell me after
- [ ] I stopped checking every case
- [ ] Two exception reviews this week, on _____ and _____
- [ ] Rules fixed where an exception showed a gap

Day	Exception: escalation, mistake or outside the limits	Gap it shows	Fix to the rules

6. Week 4: assess and adjust

Compare the last week with your baseline and the outcome you wrote down.

	Baseline	Last week
Times a week it reached me		
Minutes each time		
Problems it caused (late starts, misses)		
Outcome from section 1 met?		

Day 30 decision: tick one.

- [ ] **Transferred:** it reaches me only through the agreed exceptions. Final level written down: _____. Moved to my weekly review.
- [ ] **Extend:** it's working but not settled. Two more weeks with the same checkpoints, until _____
- [ ] **Adjust:** part of it works. Scope narrowed or limits changed: _____. Another two weeks.
- [ ] **Pause:** it isn't working. I take it back until _____ while I fix the cause: training, information, workload, or the wrong person for this job.

WHY

7. Adjust if: when to step in, and how

- [ ] **The same mistake twice:** the steps or the information are missing something
- [ ] **A decision outside the limits:** go back over the decision agreement together
- [ ] **A customer problem caused by the handoff:** fix it with the customer first, then find the cause
- [ ] **The person running out of time:** something else has to come off their plate

Fix the cause, not just the result. If you take the responsibility back, say for how long and what has to change. A silent permanent take-back teaches the whole team that nothing you hand off really sticks.

IF I TAKE IT BACK: UNTIL

WHAT HAS TO CHANGE BEFORE IT GOES BACK

What to review

- [ ] Each checkpoint happened on its date
- [ ] On day 30: the responsibility reaches me only through the agreed exceptions

After the first 30 days

NEXT ITEM FROM MY HAND OFF GROUP

ITS 30-DAY PLAN STARTS ON

Look back at your interruption log. What's left tells you where to work next (tick the one that fits):

- [ ] **Mostly office–field handoffs, scheduling and closeout:** a clear job workflow from request to payment
- [ ] **Mostly prices, job costs and cash:** profit and cash flow
- [ ] **Mostly sales questions and estimates:** a sales process the team can run
- [ ] **Mostly about people, roles and hiring:** your org chart and the role you need

CONTRACTOR SCALER HUB · TOOLKIT

Back to the course

Every file in this toolkit follows a lesson of **Get Out of the Owner Bottleneck** on the Contractor Scaler Hub: when a lesson's example changes, its file changes too. Reread the lesson when a file asks for a number you do not have yet.

All six courses: **motionops.com/scaler-hub**

Spreadsheets in this toolkit

- **Owner Bottleneck Audit**: owner-bottleneck-audit.xlsx
- **Weekly Job Review**: weekly-job-review.xlsx

See every job in one system

Book a demo. A MotionOps specialist shows you how your office and crews run every job in one place, from the first request to the final payment. **motionops.com/demo**