MotionOps

CONTRACTOR SCALER HUB · HIRE, ONBOARD AND GROW CREW LEADERS

Org Chart and Role Scorecard

Lesson 1 of the course. Write the name of who does each thing today, not who is supposed to. Log one week of the owner's hours, pick the box to fill first, then write the role scorecard before you write the job post.

1. Your org chart, with names

- [ ] One box per outcome, even if the same person fills several
- [ ] A box two people share without a clear line is split in two
- [ ] **Nobody** written where it's true: collections, warranty calls and permit tracking often have no owner
- [ ] Every box with the owner's name marked **keeps** (needs the owner's judgment) or **could transfer** (repeatable with a written standard)

Role	Owns	Name today	Reports to	Keeps or could transfer
Owner	Direction, pricing policy, hiring decisions, large customers, cash			
Office coordinator or office manager	Phones and leads, scheduling, customer updates, permits and paperwork, invoicing			
Estimator or salesperson	Site visits, estimates, proposals, follow-up			
Operations lead or project manager	Active jobs: readiness, materials, crews, customer on site, change orders, closeout			
Crew leads	One crew's day: readiness, quality, time, photos, on-site decisions within limits			
Crew members	The work			
Bookkeeper	Books, payroll, bills, tax prep with the accountant			

Role	Owns	Name today	Reports to	Keeps or could transfer

Use the blank rows for boxes you split out, and for work that has no owner.

BOXES WITH THE OWNER'S NAME

OF THOSE, MARKED COULD TRANSFER

BOXES WITH NOBODY

BOXES SHARED BY TWO

2. One week of the owner's hours

Count from a week's calendar or your interruption log, not from memory.

Owner's box	Hours per week	Repeatable?	Written standard?	Keeps or could transfer
Example Scheduling crews and reacting to changes	9	Mostly	No	Could transfer
Example Customer status calls and texts	6	Mostly	No	Could transfer
Example Site visits and estimates	12	Partly	Yes (estimating standard)	Keeps
Example Ordering and chasing materials	4	Mostly	No	Could transfer
Example Invoicing and collections	3	Yes	Partly	Could transfer
Example Pricing decisions, hiring, large customers	5	No		Keeps

Example: a 14-person remodeling company, made-up numbers. Scheduling, customer updates, materials and invoicing add up to 9 + 6 + 4 + 3 = 22 hours a week, mostly repeatable, with no owner but the owner. An office coordinator who takes those four boxes gives back roughly 22 hours. The estimator box is the biggest, but it is the one the owner is best at and the one with a written standard already.

OWNER HOURS THIS WEEK, TOTAL

HOURS IN BOXES MARKED COULD TRANSFER

3. Which box to fill first

The role you need frees the most owner hours **and** has the clearest standard to hand over. It is rarely the role that's loudest.

Candidate role	Owner hours a week it takes	How much is repeatable?	Standard written down?	What happens to revenue if it stays with you?
Example Office coordinator: scheduling, customer updates, materials, invoicing	22	Mostly	No (invoicing partly)	Idle crews, delayed cash
Example Second estimator	12	Partly	Yes	Slow estimates lose jobs

Which title? Tick the line that is true today. The job post uses that title.

- [ ] **Office coordinator:** the owner's day is interrupted by the phone and the calendar
- [ ] **Office manager:** there is an office of two or more people, or admin work has no owner
- [ ] **Project manager or operations lead:** crew leads escalate to the owner daily, or jobs run in parallel across sites

BOX OR BOXES THE NEW ROLE TAKES

TITLE FOR THE JOB POST

4. The role scorecard

One page that says what the role is for and how you'll know it's working. The job post is a summary of it, and the interview questions come from it.

Section	Example: office coordinator
Example Purpose	Keep every job scheduled, every customer informed and every invoice out, so the owner can spend the day on estimates and jobs.
Example Outcomes	Every new lead spoken to the same working day. Schedule for next week set by Thursday noon. Invoice sent within two working days of completion.
Example Responsibilities	Answer calls and messages; qualify leads with the script; book site visits; build and adjust the schedule; send customer updates at the agreed points; order standard materials; send invoices and payment reminders.
Example Authority	Reschedule within the week with customer agreement; order standard materials up to a limit you set; answer routine customer questions. Escalate scope changes, discounts and complaints.
Example Capabilities	Clear on the phone and in writing; comfortable with scheduling software; calm when the plan changes; organized enough to run a checklist every day. Trade knowledge is useful, not required.
Example Reporting and support	Reports to the owner. Daily 10-minute check-in for the first month, then weekly. Written scheduling rules, the lead script and the customer update points, before day one.
Example Capacity assumptions	Takes about 22 owner hours a week: scheduling, customer updates, materials and invoicing. The owner's time goes back into estimates.

Your role scorecard

ROLE TITLE

REPORTS TO

PURPOSE: ONE SENTENCE, WHY THIS ROLE EXISTS

OUTCOMES: THREE TO FIVE RESULTS, EACH MEASURABLE

RESPONSIBILITIES: THE RECURRING WORK, AS A LIST

AUTHORITY: WHAT THEY DECIDE WITHOUT ASKING

ESCALATES: WHAT THEY BRING TO YOU

CAPABILITIES: WHAT THEY MUST ALREADY BE ABLE TO DO

REPORTING AND SUPPORT: WHO THEY REPORT TO, HOW OFTEN YOU MEET, WHAT THEY GET FROM YOU BEFORE DAY ONE

CAPACITY ASSUMPTIONS: WHAT THE ROLE TAKES OFF OTHERS, AND WHAT IT COSTS

- [ ] The standards the role depends on are written down (for a coordinator: scheduling rules, the lead script, the customer update points)
- [ ] The authority limits are decided. Narrow at first is fine; they have to exist

5. Can you afford the role?

Cost it the way you cost a job: wage plus burden, against the hours it returns. The labor burden calculator lesson shows how to get from a wage to the real hourly cost.

WAGE

REAL HOURLY COST, WITH BURDEN

OWNER HOURS A WEEK IT RETURNS

WHAT THOSE HOURS GO INTO: ESTIMATES, JOBS, COLLECTIONS

If the honest answer is that the freed hours would not turn into estimates, jobs or collections, the role isn't the constraint yet. Re-read the chart.

Before you post: employment classification, pay rules and hiring law differ by state and trade. Check them with your accountant or an employment attorney before you post the job.

What to review, a month after the hire

- [ ] Outcomes in the chart with no owner, or with two
- [ ] Tasks the new role should take over that are still landing on the owner a month in
- [ ] Owner hours per week in the boxes marked **could transfer**, against your week in section 2