

OWNER-RUN SERVICE BUSINESS: ENACTMENT SHEET | PUBLIC VERSION

What changes, how it works and where it is recorded | Page 1 of 2 - Control and delivery

Action	Operating rule	Where it is recorded	Who checks it and how often	Proof it is working
1	Operational lead and decision rights The operational lead manages delivery and holds agreed priorities. the owner retains strategic direction, major opportunities and key relationships. Changes that displace work are recorded before the plan changes.	Authority statement and 12-month plan.	the owner and operational lead monthly, and whenever a major priority changes.	Named role, protected time, clear decisions and fewer conflicting instructions.
2	Weekly operating rhythm Use one fixed agenda: previous actions; completed work; overdue or blocked actions; live lead exceptions; CRM issues; commercial evidence; partner and commission matters; main project; backlog; decisions; new actions; final accountability check. Pass empty items quickly.	Meeting agenda and live action register.	Operational lead weekly.	Actions carry from meeting to meeting with owner, date, status and evidence.
3	Immediate cash and CRM cost checks Reconcile the unresolved income exposures, the previous CRM and all current CRM costs against source records. Treat the amounts as exposures until verified.	Immediate commercial exceptions register, with source references.	Finance owner and operational lead until every item is closed.	Each item is reconciled or has a dated recovery or correction action.
4	Three-year direction and 12-month priorities Test major decisions against the approved direction, current priorities, capacity and commercial measures. Record what the business is not prioritising as well as what it is.	Approved commercial plan and decision-rights record.	the owner quarterly; operational lead monthly.	New work can be traced to a stated priority and has a clear owner and measure.
5	Project control and website decision Run one new discretionary strategic project at a time. Other ideas go to the backlog. Urgent exceptions require a recorded joint decision. Proposals state purpose, cost, result, owner, deadline and displaced work. AI may support thinking, but it cannot approve or create a project. AI-generated proposals follow the same review, ownership and recording process as every other new idea.	Project and decision register, backlog and website decision record.	Operational lead weekly; the owner at decision points.	One active discretionary project, alternatives parked, website route recorded and AI-generated proposals reviewed before work starts.
6	the current CRM acceptance One CRM owner and one deputy. Defects close only after correction evidence and representative user testing. Train staff using live business examples.	CRM process, defect register, staff guide and training record.	CRM owner weekly until accepted, then monthly.	Defects tested, staff trained, one process used and CRM costs understood.

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Identifying details redacted or generalised | Page 2 of 2 - Clients, money and protection

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7	Live leads and legacy data One owner per live lead. Second checks only at closure, conversion, commission and referral-payment events. Classify legacy data by rules, deduplicate it and sample the results for accuracy.	the current CRM, legacy classification file and exception register.	CRM owner weekly; sample-quality review before acceptance.	No live lead lacks an owner or next action; legacy exceptions are prioritised and the error rate is known.
8	Commercial view and monthly close Follow each converted client from activity through expected and recurring commission, invoice, receipt, payout and net retained value. Keep unresolved items open with an owner and date.	Commercial management view, supported by the CRM, accounting system and business bank.	Commercial or finance owner monthly.	Completed monthly close, recurring commissions reviewed and exceptions visibly owned.
9	Partner commercial review Rank partners by actual activity, terms, cash and credible potential, not by appearing on a list. Review the first 20 and select five dormant agreements worth testing.	Partner commercial review and action list.	Commercial owner monthly.	First 20 reviewed, missing terms pursued and five dormant opportunities selected.
10	Continuity, access and financial separation Record key commitments and decision authority. Move passwords to a proper manager, use named access and two-factor authentication, remove obsolete permissions and separate personal information from business management records.	Continuity file, password manager, access register and system settings.	Operational lead monthly and after staff or supplier changes.	Another authorised person can locate essential information and access key systems safely.
11	Performance baseline and shadow bonus No payment until definitions, attribution and net contribution are reliable. Test at least two models and check the behaviour each would encourage.	Baseline report and shadow-bonus review.	the owner and operational lead at the 90-day review.	Reliable baseline, completed shadow calculations and a recorded decision on whether to proceed.