HALF-TIME TEAM TALK

OWNER-RUN SERVICE BUSINESS

Mid-project observations from a live commercial review | Public version

WHY I GOT INVOLVED

I am now roughly halfway through the work, assuming I do not get substituted before the final whistle.

The original brief was to review the website. It quickly became clear that I could not do that properly without understanding the business behind it. What was the website meant to achieve? Who was it speaking to? What should happen when somebody made an enquiry?

Over the previous two months I attended meetings, reviewed shared files and project records, read operational reports and project papers, spoke with people involved in the business and followed live discussions about clients, systems and future plans.

The more I looked, the clearer it became that the website was not really the problem. It was simply the first place where a wider pattern became visible.

This is not an audit or a verdict on the client. It is a half-time team talk: what I saw, what the evidence supported and what I believed would help during the second half.

WHAT I HAVE SEEN

The central problem is not a shortage of ideas or effort. It is that too much of the business can still be started, changed or redirected without enough control around what begins, what stops and what has actually been agreed.

> ***There is a proper business here, but too much of it still depends on one person remembering, deciding and following through on everything. That is not fair on the owner, the team or the business.***

When work begins before the destination, owner and expected result have been settled, people understandably fill in the gaps themselves. Decisions are interpreted differently, progress becomes difficult to judge and another priority can arrive before the last one has been finished.

The proposed paid service levels are another useful example. Work was done to define and price an offer, but there is no evidence that it was pressure-tested, formally approved, assigned, launched or clearly closed. The issue is not whether the idea was good or bad. It is that time can be spent developing an idea without a proper decision about whether the business is actually going to pursue it.

One question kept coming back to me:

> ***How does this recruit, support or retain more clients through the business?***

I asked it during website discussions, CRM conversations, AI meetings and document reviews. Sometimes the answer was obvious. Often it was not.

It does not need to become a slogan repeated in every meeting. It is simply a useful test. If a major piece of work cannot answer that question, the business should be clear about why it is still worth the time and money.

THE WEBSITE SHOWED THE PATTERN

The website had already been under development for a long period before this review began. A supplier-built version was live, while a separate alternative build was then developed as part of the review.

The alternative build was not simply cosmetic. It included CRM integration and more capability than the existing site, but the project still did not reach a clear final decision about what should be kept, changed or abandoned.

To force that decision, I produced a detailed comparison workbook that broke the proposed changes into more than 100 individual decisions and ended with a clear approval section.

It was deliberately built so that nothing could later be treated as agreed by implication. I received no meaningful response.

An AI response later recommended a hybrid structure using one platform for the public website, another for bespoke AI, the CRM for lead management and the document system for the intranet.

Without a direct decision or clear communication, I took that to mean the public-site route had changed and created further work on the existing platform after already developing the alternative build. Attention then moved again towards AI funding and wider technology discussions.

None of those ideas was necessarily wrong. The problem was that the decision had to be worked out rather than clearly made.

The website did not suffer because somebody made one terrible decision. It suffered because decisions never quite became decisions.

THE CRM MAKES IT PRACTICAL

The internal CRM implementation report recorded unresolved issues around manual lead creation, pipeline progression, reporting, notifications and duplicate contacts. Those were not my assumptions. They were recorded within the business's own review.

In three Tuesday meetings I attended, staff repeatedly expressed frustration with the new CRM and asked whether they could return to the old system. They said they had not received proper training and found parts of the new system difficult to use.

That does not prove the wrong CRM was purchased. It shows that the system has not yet been properly embedded.

A CRM only improves the business when the people using it understand it, trust it and use it in the same way. At the moment, that is not happening consistently.

The answer is not necessarily another system. It is to make the existing one work properly, train the staff and agree exactly how every enquiry should move from first contact to conversion or closure.

That discipline has to apply to everyone. It is no good asking staff to record ownership, next actions and outcomes in the CRM if important instructions, promises or changes continue outside the agreed process.

LEADS SHOULD NOT DEPEND ON MEMORY

In the live-client discussions and records I reviewed, I saw examples of why this matters.

In one case, the owner asked whether an email had been sent and the follow-up then abandoned. A team member could see only one follow-up in the shared email trail and could not confirm whether more contact had happened through direct messaging. The full history had to be checked with the case owner the following morning.

In another case, a client had registered earlier, but the details were held in old records. The owner had to ask who owned the case, and the team then had to reconstruct the contact history because the client was continuing to message the owner directly.

The evidence does not prove either client was ignored. In fact, one record showed that follow-up had happened. What it shows is that the full history, owner and next action could not be seen immediately.

The business should not have to rebuild a client's story from an old system, email, direct messages and somebody's memory. Every live client should have one visible owner, one clear next step and enough communication history for another team member to understand what happened.

THE NUMBERS NEED TO BE EASIER TO SEE

There is a large amount of information inside the business. I saw partner documents, contracts, income information, operational files, CRM work and staff spreadsheets.

The information exists. The problem is that there is no single view that everyone can rely on.

When I asked for figures covering enquiries, active cases, conversions and partner performance, I was shown separate staff spreadsheets using different colours, formats and keys understood mainly by the people who created them.

That is not a criticism of the staff. They have built practical ways to keep the work moving. But the business should not depend on finding the right spreadsheet or the one person who understands what each colour means.

Management should be able to see quickly:

- how many live enquiries are open and who owns each one
- where clients are becoming stuck
- which partners are producing activity and conversions
- what income is expected, invoiced and received
- what direct payouts have been made and what the business actually retains
- how effectively enquiries are becoming clients
- whether work is being shared fairly across the team

The purpose is not more paperwork. It is to let the business make decisions from the same facts and understand the commercial value behind the activity.

MEETINGS NEED A FINISH LINE

The meetings I attended were positive, energetic and full of ideas. The weakness was not the conversation. It was what happened afterwards.

A useful meeting should end with a clear decision, one owner, a deadline and an expected result. The next meeting should begin by checking whether it happened.

That is not bureaucracy. It is how good ideas turn into progress.

Without that finish line, different people leave with different interpretations. Actions stay open, attention moves elsewhere and work that was never finished starts competing with the next opportunity.

The website shows what happens when the direction is understood differently by different people. The same risk exists around CRM, AI and funding.

WHAT the business ALREADY HAS

There is a proper business here.

I saw real staff profiles, live partner agreements, detailed policies, videos, operational knowledge and people working hard to support clients. The alternative website work also showed a clear human promise and stronger trust than many competing service businesses.

The owner is part of that value. His relationships, knowledge, ideas and credibility helped build the business and continue to create opportunities.

Those are real assets, not polite filler.

The business does not need reinventing. It needs the useful parts to work together more reliably, with less depending on individual memory and fewer important decisions left open.

That is fixable.

THE SECOND HALF

1. Protect day-to-day delivery

The owner should remain closely involved in relationships, major commercial opportunities and the wider direction of the business. One operational lead should have clear authority to manage the weekly plan, staff priorities, overdue actions and delivery. Important changes should be discussed and recorded through that person before the agreed plan is altered.

2. Agree the direction

The business needs one clear three-year direction supported by practical 12-month priorities. Staff should be consulted and briefed, the owner should approve the commercial direction and the operational lead should confirm whether it can be delivered with the available people, time and money.

3. Finish the website decision and control new projects

Select the website route, close or park the alternatives and record what has been decided. New major discretionary work should not displace current priorities without a recorded review of its purpose, cost, expected result and the work it replaces.

4. Accept, correct and embed the CRM

Appoint one accountable CRM owner and one trained deputy. Resolve the known defects, train the staff and agree one enquiry-to-closure process that the team can use consistently.

5. Make live leads and commercial events visible

Every live client should have one owner, a next action, a due date and enough important history for another person to understand the position. Second checks should be used at important closure, conversion, income and payout events, not for every routine update.

6. Build one commercial view

Join the information needed to see clients, partners, expected income, invoices, receipts, direct payouts and the net amount retained by the business.

7. Protect knowledge and follow through

Use one weekly action process, record important partner commitments and decisions, make sure another authorised person can continue the work if the owner is unavailable and protect access to the business's systems and records.

FINAL THOUGHTS

This is not a report telling the client what is wrong. It is a half-time team talk from somebody who spent enough time inside the business to see a pattern.

There is a proper business here, with relationships, experienced people, active clients and real commercial opportunities. The risk is that too much of its direction, knowledge and follow-through still sits with one person. The next stage is not about taking control away from the owner. It is about putting enough structure around the owner and the team to protect what has already been built.

The second half should be about making the important decisions clear, protecting the agreed priorities, getting the CRM used properly, making every live client and commercial outcome visible, and giving the team a plan they can actually work from.

That would give the people already working hard inside the business a much better chance of producing the results it is capable of.

The accompanying 90-Day Action Plan turns these findings into 11 practical actions, with owners, deadlines and clear evidence of completion to be agreed with the client.