



LEADSCAPE™ OPERATING PLAYBOOK

# Decision Infrastructure for Landscape Companies

The Complete Operating System for Companies \$2M - \$12M

Version 1.0 | 2026

## Primary Outcome

*Remove the owner from operational decision bottlenecks.*

### THIS PLAYBOOK INCLUDES

- The Design Yourself Out Framework
- Weekly Operating Cadence Guide
- KPI Dashboard Templates
- Decision Rights Matrix (4 Authority Levels)
- 23 Decision-Rights-Driven SOPs
- Owner Exit Scorecard

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From the LeadScape™ Methodology | Design Yourself Out

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## SECTION 1

# The Design Yourself Out Framework

## Why Landscape Companies Hit the Ceiling

Every landscape company that grows past \$3M in revenue runs into the same invisible wall. Revenue stalls. Margins compress. The owner works harder but the company does not grow faster. The industry calls it different things, but the root cause is always the same: the owner has become the bottleneck for every operational decision in the company.

This is not a character flaw. It is a structural problem. The company was built around the owner's judgment, relationships, and standards. That works beautifully at \$1M. It starts to crack at \$3M. And by \$6M, it becomes the single largest constraint on growth, profitability, and quality of life.

## The Four Root Causes

- **Owner Decision Dependency** - Every question, every exception, every judgment call routes to one person. The company cannot move faster than the owner can think.
- **Undefined Authority** - Nobody knows exactly what they are allowed to decide. So they ask. Every time. About everything.
- **Unclear Escalation Paths** - When something goes wrong, there is no rule for when to handle it and when to send it up. The default is always "call the boss."
- **Institutional Knowledge Instead of Systems** - The rules live in the owner's head, not on paper. When the owner is unavailable, the company freezes.

### THE 27-MINUTE PROBLEM:

*Research shows that employees in owner-dependent companies lose an average of 27 minutes per day waiting for decisions that could have been made at their level, if only they had clear criteria and explicit authority. Across a 20-person company, that is 9 hours of lost productivity every single day. Over a season, that is the equivalent of losing an entire crew.*

## SECTION 1

### The LeadScape Operating Model

The LeadScape methodology is built on a simple premise: the owner's job is not to make every decision. The owner's job is to build the system that makes decisions correctly without them. This playbook is that system.

#### The Four-Stage Framework

Every company moves through four stages on the path from owner-dependent to owner-designed:

Stage	Focus	What Changes	Owner Role
<b>1. Clarity</b>	Define who decides what	Decision Rights Matrix created for all 15 decision categories	<b>Architect</b>
<b>2. Authority</b>	Transfer decisions to the right level	Role cards distributed Handoff conversations completed	<b>Teacher</b>
<b>3. Cadence</b>	Build the rhythm that keeps it running	3-meeting weekly cadence installed and running	<b>Coach</b>
<b>4. Capacity</b>	Scale without adding owner hours	Owner hours on others' decisions drop below 8/week	<b>Builder</b>

#### The Decision Rights Matrix

The Decision Rights Matrix is the foundation on which every SOP in this playbook sits. It answers the question that kills more productivity than any other in a landscape company: "Who decides?" Every decision in your company falls into one of four authority levels. The matrix makes these levels explicit, measurable, and non-negotiable.

Authority Level	Who Decides	Criteria	Examples
<b>Level 1 Employee Decides</b>	Crew Leader or individual contributor	Within defined thresholds. No approval needed. Info flow only.	Field supplies under \$150/day OT up to 2 hours Minor scope adjustment (<15 min)
<b>Level 2 Manager Decides</b>	Ops Manager or Account Manager	Within expanded thresholds. Documented criteria. Weekly reporting.	Equipment repairs up to \$1,500 First complaint credit up to \$200 Rain day rescheduling
<b>Level 3 Collaborative Decision</b>	Two managers jointly or manager + owner	Root cause analysis required. Joint recommendation. Escalation if unresolved.	Recurring complaints (3+ in 90 days) Multi-day schedule rebuild Systemic quality patterns
<b>Level 4 Owner Decides</b>	Owner only	Strategic, financial, or relationship risk. All others have escalated.	At-risk account/cancellation Capital purchases above threshold Terminations, management hires

Every SOP in this playbook maps each step to one of these four levels. When your people read a procedure, they do not just see what to do. They see who decides, what criteria apply, and exactly when it leaves their hands. That is the difference between an SOP that collects dust and one that actually runs your company.

**THE CORE PRINCIPLE:**

*The matrix provides clarity. The cadence provides rhythm. Every SOP in this playbook connects the two. When a situation does not fit the criteria, refine the rule. Do not abandon the system.*



## SECTION 2

# Operating Cadence

## The Weekly Leadership Rhythm

The Decision Rights Matrix tells your people what they own. The operating cadence is how you keep the system alive. Three meetings per week, roughly 60 total minutes. Run these every week without exception. Skip one, and the system starts to drift. Skip two, and you are back to being the bottleneck.

### MONDAY MORNING STANDUP - 15 MINUTES

Who: Owner, Ops Manager, Account Manager(s) | When: Monday morning before first truck rolls

Agenda Item	What to Cover	Time
Week Preview	What is on the schedule this week? Anything unusual to flag?	5 min
Matrix Check	"Who owns what this week?" Any situation from last week where criteria did not fit?	5 min
Flags	Client issues, equipment concerns, or staffing gaps before the week starts?	5 min

### WEDNESDAY OPERATIONS REVIEW - 30 MINUTES

Who: Owner + Ops Manager (one-on-one only) | When: Wednesday midday. Week is half done - real data to discuss.

Agenda Item	What to Cover	Time
Dashboard Review	Review the 5 core KPIs. What moved? What did not? On track to targets?	10 min
Decision Debrief	Walk through 2-3 decisions made since Monday. Within criteria? Calibrate if needed.	10 min
Criteria Gaps	Any situation where the criteria did not fit? Refine the rule - <b>do not abandon the system.</b>	5 min
Look-Ahead	What in the second half of the week needs visibility now?	5 min

### FRIDAY CLOSE-OUT - 15 MINUTES

Who: Owner, Ops Manager, Account Manager(s) | When: Friday afternoon after last crew is in.

Agenda Item	What to Cover	Time
Wins	What went right this week? Name them specifically. <i>Public acknowledgment builds culture.</i>	5 min
Misses	What did not go as planned? What did we learn? No blame - just diagnosis.	5 min
Client Pulse	Any client situations to carry into next week?	3 min
One Thing for Monday	One specific action or focus to carry into the coming week.	2 min

## MONTHLY DECISION REVIEW - 60 MINUTES

Who: Owner, Ops Manager, Account Manager(s) | When: First week of each month

Agenda Item	What to Cover	Time
Dashboard Review	KPI trends from past 30 days. What moved? What did not? On track to meet benchmarks?	10 min
Spotlight Wins	Name 2-3 decisions that went well. Who made them. What criteria they used.	10 min
Spotlight Lessons	One decision that did not go well. Criteria gap? Confidence gap? Process failure?	10 min
Criteria Adjustments	Which decision needs adjustment? What is wrong with the current criteria? What should it say?	5 min
Escalation Patterns	Decisions escalating that should not? Decisions not escalating that should?	5 min
Clarity Check	"1-10, how clear are you on what you own?" Below 7 = action before next month.	5 min

### THE CADENCE RULE:

*The matrix provides clarity. The cadence provides rhythm. Miss a meeting and you miss the calibration that keeps the system honest. Your people need to see that you take the cadence seriously. If the owner skips the Wednesday review, the system sends a message: this does not matter. And it will stop working.*

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## SECTION 3

# The SOP Library

## Standard SOP Template

Every SOP in this playbook follows the same seven-part structure. This is not a traditional checklist. Each procedure embeds Decision Rights, escalation criteria, KPI targets, and cadence connections directly into the workflow. Your people do not just learn what to do. They learn who decides, when to escalate, and how the process connects to the weekly rhythm of the company.

Section	What It Contains	Why It Matters
<b>1. Purpose</b>	Why this process exists and what problem it solves.	<i>Connects the task to the bigger operating philosophy.</i>
<b>2. Decision Rights Matrix</b>	Who owns what decisions within this process, with specific criteria and dollar thresholds.	<i>Eliminates the 27-Minute Problem. People stop asking for permission when the criteria are clear.</i>
<b>3. Step-by-Step Procedure</b>	Phased workflow with each step assigned to a specific role.	<i>Every step names who owns it. No ambiguity about responsibility.</i>
<b>4. Escalation Triggers</b>	Exact conditions where authority shifts to the next level.	<i>Your people know when to handle it and when to send it up.</i>
<b>5. KPI Targets</b>	3-5 measurable outcomes tied to this specific process.	<i>What gets measured gets managed. Connects to the KPI Dashboard.</i>
<b>6. Cadence Integration</b>	Which meetings review this process and what data to bring.	<i>Keeps the SOP alive inside the weekly operating rhythm.</i>
<b>7. Criteria Evolution Log</b>	Tracks changes to decision criteria over time with approval dates.	<i>Makes the SOP a living document. Builds institutional memory.</i>

## The Complete SOP Library: 23 Procedures

The following SOPs cover the operational decisions that generate 90% of owner interruptions in landscape companies between \$3M and \$15M. They are organized into four categories. Each SOP maps to one or more of the 15 Decision Rights Templates from the companion workbook.

## CLIENT MANAGEMENT

SOP #	Title	Primary Role	Decision Template(s)
SOP-001	New Client Onboarding	Account Manager	Template 2 (Client Tiering)
SOP-002	Property Walkthrough	Account Manager	Template 2, Template 11 (Quality)
SOP-003	Service Scope Changes	Account Manager	Template 4 (Change Orders)
SOP-004	Pricing Deviations	Account Manager	Template 3 (Pricing)
SOP-005	Contract Renewal	Account Manager	Template 3 (Pricing)
SOP-006	Client Complaint Resolution	Account Manager	Template 9 (Complaints & Credits)
SOP-007	At-Risk Client Protocol	Owner	Template 9 (Complaints & Credits)

## FIELD OPERATIONS

SOP #	Title	Primary Role	Decision Template(s)
SOP-010	Daily Crew Dispatch	Ops Manager	Template 5 (Crew Assignments)
SOP-011	Weather Delay Protocol	Ops Manager	Template 6 (Schedule Changes)
SOP-012	Quality Inspections	Ops Manager	Template 11 (Quality Issues)
SOP-013	Property Damage Response	Crew Leader	Template 8 (Safety), Template 9
SOP-014	Irrigation Break Handling	Crew Leader	Template 1 (Equipment)
SOP-015	Site Safety Incident	Crew Leader	Template 8 (Safety Incidents)

## FINANCIAL CONTROL

SOP #	Title	Primary Role	Decision Template(s)
SOP-020	Credit Authorization	Account Manager	Template 9 (Complaints & Credits)
SOP-021	Invoice Disputes	Account Manager	Template 3 (Pricing)
SOP-022	Budget Variance Response	Ops Manager	Template 10 (Budget Variances)
SOP-023	Subcontractor Approval	Ops Manager	Template 13 (Subcontractor Use)
SOP-024	Equipment Purchase	Ops Manager	Template 1 (Equipment)

## LEADERSHIP INFRASTRUCTURE

SOP #	Title	Primary Role	Decision Template(s)
SOP-030	Hiring Approval Process	Ops Manager / Owner	Template 7 (Hiring & Termination)
SOP-031	Crew Leader Coaching Cadence	Ops Manager	Template 14 (Training)
SOP-032	KPI Dashboard Review	Ops Manager	All Templates (cross-cutting)
SOP-033	Decision Escalation Protocol	All Roles	All Templates (cross-cutting)
SOP-034	Monthly Decision Review	Owner	All Templates (cross-cutting)

## SECTION 4

## KPI Dashboard

### The 5 Core Metrics

Start with these five metrics. If this dashboard doesn't fit on one page, it is too complex. The Ops Manager owns data entry. You review it on Wednesday. Add more over the first 90 days as the system matures and your team builds the habit of measurement.

#	Metric	What It Measures	Target	Owner
1	Escalation frequency to owner	Decisions per day reaching the owner	< 8 per day (from 25-40)	Ops Manager tracks. Owner validates.
2	Client complaints per week	Total complaints received	Trending down	Account Manager logs in CRM.
3	Overtime spend vs. budget	Weekly OT dollars vs. target	+/- 10%	Ops Manager tracks weekly.
4	Revenue per labor hour	Revenue divided by total labor hours	Trending up	Controller or bookkeeper.
5	Complaint resolution time	Hours from complaint to resolution	< 8 hours	Account Manager logs in CRM.

## Day 30 / 60 / 90 Benchmark Targets

These benchmarks help you calibrate expectations. Most companies see dramatic improvement in the first 30 days as the matrix takes hold, with steady refinement through Day 90.

Metric	Before	Day 30	Day 60	Day 90
Decisions reaching owner/day	25-40	15-20	10-15	8-12
Owner hrs on others' decisions/wk	18-22 hrs	14-16 hrs	10-12 hrs	6-8 hrs
Ops Mgr escalations to owner	Daily, multiple	Daily, 1-2x	3-4x/wk	2-3x/wk
Complaint resolution time	24-48 hrs	12-24 hrs	8-12 hrs	4-8 hrs
Overtime spend variance	High variability	Within 15%	Within 12%	Within 10%

### THE BENCHMARK THAT MATTERS MOST:

Owner hours spent on other people's decisions. This single metric tells you whether the system is working. If you started at 20 hours per week and you are at 8 by Day 90, you have recovered 12 hours per week of strategic capacity. That is 624 hours per year. That is where growth comes from.



## SECTION 5

## Owner Exit Scorecard

### Measuring Owner Decision Hours

The Owner Exit Scorecard is the ultimate measure of whether this playbook is doing its job. It tracks the single most important metric in your business: how many hours per week you spend making decisions that someone else could make if they had the right criteria and authority.

ODH/ Week Owner Decision Hours	What It Means	Your Stage	Next Move
20+ hours	Owner Bottleneck. You are the ceiling. Every decision routes through you.	Pre-Framework	Install Decision Rights Matrix. Conduct handoff conversations. Start the weekly cadence.
15-20 hours	Early Structure. Matrix is installed but team is still checking with you.	Stage 1: Clarity	Calibrate criteria in Wednesday reviews. Build confidence through repetition. Let mistakes happen.
10-15 hours	Building Momentum. Team is making decisions. Some criteria gaps remain.	Stage 2: Authority	Expand authority where earned. Refine escalation triggers. Coach, do not correct.
5-10 hours	Leadership Infrastructure. System is running. You review decisions, not make them.	Stage 3: Cadence	Focus on strategic decisions only. Build bench strength. Plan for scale or succession.
< 5 hours	Owner-Designed Company. The business runs without you in the daily operation.	Stage 4: Capacity	Scale, acquire, exit, or enjoy. You built the machine. Now decide what to do with it.

### The Path from Bottleneck to Builder

This is not a 90-day project, and then you are done. This is an operating system that evolves with your company. The criteria change as your team grows. The authority levels expand as people earn trust. The cadence stays the same because rhythm is what holds it all together.

The goal is not perfection on Day 1. The goal is progress that compounds. Every decision your team makes correctly without you is a decision you never have to make again. Every criteria refinement in the monthly review makes the next month smoother. Every good-faith mistake your team makes and learns from builds the judgment you are trying to distribute.

**THE FINAL WORD:**

*You did not start a landscape company to answer the same 40 questions every day. You started it to build something. This playbook gives your people the clarity to make decisions, the criteria to make them well, and the cadence to keep getting better. Your job is not to make every decision. Your job is to build the system that makes decisions correctly without you. Now go build it.*

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# Complete Set of 15 Decision Rights Templates

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## All 15 Decision Rights Templates

Chapter 5 · "The Decision Rights Matrix" – templates explained at the beginning of Chapter 5.

Each template: EXAMPLE (pre-filled) followed by YOUR COMPANY (blank).

Thresholds calibrated for \$6M-\$10M. Adjust up or down for your revenue stage.

### Column guide

1. **Decision** = what is being decided.
2. **Authority** = who has final say.
3. **Criteria** = the objective rules they follow (make these specific and measurable).
4. **Escalation Trigger** = the condition that sends it up the chain.
5. **Info Flow** = how the next level stays informed without approving.

#### Template 1 – Equipment Purchases, Repairs & Rentals- EXAMPLE

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Field supplies & minor materials	Crew Leader	Must support active job. Under \$150/day. Approved vendor.	Single purchase exceeds \$150.	Weekly summary to Ops Mgr.
Repairs & rentals	Ops Mgr	Repair if <\$1,500 + <40% of replacement value	Repair >\$1,500 or same asset repaired twice within 60 days	Owner: weekly equipment report.
Capital purchases above threshold	Owner	Review repair history, useful life, budget availability.	N/A – Owner-level.	Ops Mgr/Acct'g informed after decision.

#### Template 1 – Equipment Purchases, Repairs & Rentals- YOUR COMPANY

Decision	Authority	Criteria	Escalation Trigger	Info Flow

**All 15 Decision Rights Templates- continued**

Chapter 5 · "The Decision Rights Matrix" – templates explained at the beginning of Chapter 5.

Each template: EXAMPLE (pre-filled) followed by YOUR COMPANY (blank).

Thresholds calibrated for \$6M-\$10M. Adjust up or down for your revenue stage.

Template 2 – Hiring & Firing				
Decision	Authority	Criteria	Escalation Trigger	Info Flow
Seasonal crew hire	Ops Manager	Within approved headcount budget. Documents a real gap.	Hire exceeds approved headcount or budget.	Owner: wky staff update. HR file updated.
Termination	Owner	Full HR documentation complete. Policy violation on record.	N/A – Owner-level.	Legal counsel if exposure exists.
Management hire	Owner	Position budgeted. Full interview process complete.	N/A – Owner-level.	Ops Mgr informed immediately.

Template 2 – Hiring & Firing				
Decision	Authority	Criteria	Escalation Trigger	Info Flow



**All 15 Decision Rights Templates- continued**

Chapter 5 · "The Decision Rights Matrix" – templates explained at the beginning of Chapter 5.

Each template: EXAMPLE (pre-filled) followed by YOUR COMPANY (blank).

Thresholds calibrated for \$6M-\$10M. Adjust up or down for your revenue stage.

Client requests discount Owner: weekly

Template 3 – Client Pricing – Enhancements, Discounts & Renewals				
Decision	Authority	Criteria	Escalation Trigger	Info Flow
Enhancement pricing (standard)	Account Manager	Approved rate card only. 45% gross margin minimum.	Client requests discount below rate card.	Owner: weekly sales report.
Contract renewal – no price change	Account Manager	Client in good standing. No cost increase required.	Client disputes pricing or competitor is actively bidding.	Owner: renewal tracker.
Competitive bid / discount approval	Owner	Review margin impact and strategic account value.	N/A – Owner-level	A/M informed of outcome and reasoning

Template 3 – Client Pricing – Enhancements, Discounts & Renewals				
Decision	Authority	Criteria	Escalation Trigger	Info Flow



**All 15 Decision Rights Templates- continued**

Chapter 5 · "The Decision Rights Matrix" – templates explained at the beginning of Chapter 5.

Each template: EXAMPLE (pre-filled) followed by YOUR COMPANY (blank).

Thresholds calibrated for \$6M-\$10M. Adjust up or down for your revenue stage.

Template 4 – Change Orders				
Decision	Authority	Criteria	Escalation Trigger	Info Flow
Minor on-site adjustment (<15 min)	Crew Leader	Does not change service time by more than 15 min. No contract impact.	Client requests contract scope changes.	A/M informed of any client-facing change.
Standard enhancement change order	Account Manager	Approved rate card. Documented and signed by client.	Change order exceeds \$500 or modifies base contract terms.	O/M informed of scheduling impact.
Contract-altering change order	Owner	Material change to scope, pricing, or service agreement.	N/A – Owner-level.	All parties informed in writing.

Template 4 – Change Orders				
Decision	Authority	Criteria	Escalation Trigger	Info Flow



**All 15 Decision Rights Templates- continued**

**Chapter 5 · "The Decision Rights Matrix" – templates explained at the beginning of Chapter 5.**

**Each template:** EXAMPLE (pre-filled) followed by YOUR COMPANY (blank).

**Thresholds calibrated for \$6M-\$10M. Adjust up or down for your revenue stage.**

Template 5 – Crew Assignments & Routing				
Decision	Authority	Criteria	Escalation Trigger	Info Flow
Daily routing & assignment	Ops Manager	Balance drive time, skill match, Tier 1 priority. Crew leaders informed by 6 AM.	Key account needs specific crew and crew is unavailable.	Crew leaders daily. A/M on Tier 1 changes.
Mid-day crew swap	Ops Manager	Driven by call-out or emergency. Maintain Tier 1 coverage first.	Swap affects multiple routes or creates service gap.	A/M & crew leaders notified immediately.
Daily task assignment within crew	Crew Leader	Assign based on skill, efficiency, development needs.	Performance issue requiring formal conversation.	N/A: standard daily leadership

Template 5 – Crew Assignments & Routing				
Decision	Authority	Criteria	Escalation Trigger	Info Flow



## All 15 Decision Rights Templates- continued

Chapter 5 · "The Decision Rights Matrix" – templates explained at the beginning of Chapter 5.

Each template: EXAMPLE (pre-filled) followed by YOUR COMPANY (blank).

Thresholds calibrated for \$6M-\$10M. Adjust up or down for your revenue stage.

### Template 6 – Schedule Changes – Rain, Call-Outs & Disruptions

Decision	Authority	Criteria	Escalation Trigger	Info Flow
Rain delay – same-day adjustment	Ops Manager	Push to next available day. Tier 1 priority. Notify clients of 2+ day delays.	Rain extends beyond 2 consecutive days.	A/M and Crew Leaders by end of day.
Call-out / no-show coverage	Ops Manager	Redistribute to maintain critical routes first, then by client tier.	No coverage available and Tier 1 account is affected.	Account Mgr notified on any Tier 1 impact.
Multi-day schedule rebuild	Owner + Ops Mgr	Collaborate. Assess revenue impact. Coordinate client communication.	N/A – collaborative decision.	All staff and affected clients informed.

### Template 6 – Schedule Changes – Rain, Call-Outs & Disruptions

Decision	Authority	Criteria	Escalation Trigger	Info Flow



**All 15 Decision Rights Templates- continued**

Chapter 5 · "The Decision Rights Matrix" – templates explained at the beginning of Chapter 5.

Each template: EXAMPLE (pre-filled) followed by YOUR COMPANY (blank).

Thresholds calibrated for \$6M-\$10M. Adjust up or down for your revenue stage.

Template 7 – Vendor Selection & Commitments				
Decision	Authority	Criteria	Escalation Trigger	Info Flow
Order from preferred vendor list	Ops Manager	Preferred vendor only. Best price within 5%. Meets timeline requirements.	Order outside preferred list or price variance of 15%.	Owner: monthly vendor spend report
New vendor evaluation	Ops Manager	Min. 3 references. Insurance verified. Trial order completed.	Annual spend with new vendor >\$10,000.	Owner informed before commitment.
Long-term or large vendor commitment	Owner	Any contract >\$10K/ year or multi-year terms.	N/A – Owner-level.	Ops Mgr confirms operational fit.

Template 7 – Vendor Selection & Commitments				
Decision	Authority	Criteria	Escalation Trigger	Info Flow



**All 15 Decision Rights Templates- continued**

**Chapter 5 · "The Decision Rights Matrix" – templates explained at the beginning of Chapter 5.**

**Each template:** EXAMPLE (pre-filled) followed by YOUR COMPANY (blank).

**Thresholds calibrated for \$6M-\$10M. Adjust up or down for your revenue stage.**

Template 8 – Safety Incidents				
Decision	Authority	Criteria	Escalation Trigger	Info Flow
Stop work – unsafe condition	Crew Leader (Absolute)	ANY condition believed unsafe. No approval required. Ever.	Never– stopping is always authorized. Always report.	O/M and Owner informed as soon as safe to do so.
Injury response	Ops Manager	Follow incident protocol. Ensure medical attention. Document same day.	Any injury requiring medical attention beyond first aid.	Owner informed immediately. I/R -same day.
Equipment safety removal	Crew Leader	Remove from rotation if any safety check fails. No approval required.	Removal affects next-day crew deployment.	O/M notified. Owner if client loss at risk.

Template 8 – Safety Incidents				
Decision	Authority	Criteria	Escalation Trigger	Info Flow



## All 15 Decision Rights Templates- continued

Chapter 5 · "The Decision Rights Matrix" – templates explained at the beginning of Chapter 5.

Each template: EXAMPLE (pre-filled) followed by YOUR COMPANY (blank).

Thresholds calibrated for \$6M-\$10M. Adjust up or down for your revenue stage.

Template 9 – Client Complaints & Credits				
Decision	Authority	Criteria	Escalation Trigger	Info Flow
First complaint – credit up to \$200	Account Manager	Valid complaint. Documented. Recent visit within 7 days, photo evidence.	Credit > \$200 or 2nd credit to same client <60 days.	Owner: weekly client report.
Recurring complaint (3+ in 90 days)	Acct Mgr + Ops Mgr	Root cause analysis. Review crew, quality history, service frequency.	Pattern does not resolve after two corrective actions.	Owner informed of findings & proposed plan.
At-risk account / cancellation threat	Owner	Tier 1 or strategic account. Revenue or relationship at risk.	N/A – Owner-level.	A/M coordinates all follow-up communication.

Template 9 – Client Complaints & Credits				
Decision	Authority	Criteria	Escalation Trigger	Info Flow



**All 15 Decision Rights Templates- continued**

Chapter 5 · "The Decision Rights Matrix" – templates explained at the beginning of Chapter 5.

Each template: EXAMPLE (pre-filled) followed by YOUR COMPANY (blank).

Thresholds calibrated for \$6M-\$10M. Adjust up or down for your revenue stage.

Template 10 – Budget Variances				
Decision	Authority	Criteria	Escalation Trigger	Info Flow
Job variance within 10%	Ops Manager	Identify cause. Document in weekly ops report. No action if seasonal.	Variance exceeds 10% or is structural (not seasonal).	Owner sees in Wednesday d/board review.
Company margin miss 2+ months	Owner	Review revenue, labor, equipment spend, and overhead drivers.	N/A – Owner-level.	O/M & Controller present root cause and 30-day plan.

Template 10 – Budget Variances				
Decision	Authority	Criteria	Escalation Trigger	Info Flow



**All 15 Decision Rights Templates- continued**

**Chapter 5 · "The Decision Rights Matrix" – templates explained at the beginning of Chapter 5.**

**Each template:** EXAMPLE (pre-filled) followed by YOUR COMPANY (blank).

**Thresholds calibrated for \$6M-\$10M. Adjust up or down for your revenue stage.**

Template 11 – Quality Issues & Rework				
Decision	Authority	Criteria	Escalation Trigger	Info Flow
Property fails quality check	Crew Leader	Root cause analysis. Crew reassignment or retraining protocol.	Rework impacts other scheduled clients this day.	A/M and O/M informed immediately.
Systemic quality pattern	Ops Manager	Fix before leaving if below standard. Track rework hours by crew.	Pattern persists after two corrective actions.	Owner informed of findings and corrective plan.

Template 11 – Quality Issues & Rework				
Decision	Authority	Criteria	Escalation Trigger	Info Flow



**All 15 Decision Rights Templates- continued**

**Chapter 5 · "The Decision Rights Matrix" – templates explained at the beginning of Chapter 5.**

**Each template:** EXAMPLE (pre-filled) followed by YOUR COMPANY (blank).

**Thresholds calibrated for \$6M-\$10M. Adjust up or down for your revenue stage.**

Template 12 – Equipment Breakdown Decisions				
Decision	Authority	Criteria	Escalation Trigger	Info Flow
Field repair <\$500, same-day	Crew Leader	Parts on hand. Crew has skill. Returns to service same day.	Repair >30 min or parts not available.	Ops Mgr notified via text.
Backup equipment swap	Crew Leader	Backup available and retrievable within 30 min.	No backup available and job cannot continue.	Ops Mgr notified immediately.
Repair vs. replace (\$500-\$1,500)	Ops Manager	Repair if <40% of replacement value and <5 years old.	Repair >\$1,500 or equipment critical to next-day operations.	Owner: weekly equipment report

Template 12 – Equipment Breakdown Decisions				
Decision	Authority	Criteria	Escalation Trigger	Info Flow



**All 15 Decision Rights Templates- continued**

Chapter 5 · "The Decision Rights Matrix" – templates explained at the beginning of Chapter 5.

Each template: EXAMPLE (pre-filled) followed by YOUR COMPANY (blank).

Thresholds calibrated for \$6M-\$10M. Adjust up or down for your revenue stage.

Template 13 – Subcontractor Use				
Decision	Authority	Criteria	Escalation Trigger	Info Flow
Approved sub – under \$5,000	Ops Manager	On approved list. Insurance current. Scope documented. Cost <= 10% of internal estimate.	Cost > \$5,000 or involves Tier 1 client.	Owner: weekly subcontractor report.
New sub or spend over \$5,000	Owner	Verify references, insurance, and prior track record.	N/A – Owner-level.	O/M coordinates execution & monitors.

Template 13 – Subcontractor Use				
Decision	Authority	Criteria	Escalation Trigger	Info Flow



## All 15 Decision Rights Templates- continued

Chapter 5 · "The Decision Rights Matrix" – templates explained at the beginning of Chapter 5.

Each template: EXAMPLE (pre-filled) followed by YOUR COMPANY (blank).

Thresholds calibrated for \$6M-\$10M. Adjust up or down for your revenue stage.

Template 14 – Weather Calls				
Decision	Authority	Criteria	Escalation Trigger	Info Flow
Same-day weather delay	Ops Manager	Follow documented heat, lightning, rain protocols. Delay up to 2 hours based on forecast.	Delay beyond 2 hours (full rain day) or 2 consecutive rain days	Owner, Crew Leaders, A/M's by 5:30 AM.
Multi-day disruption / backlog rebuild	Owner + Ops Mgr	Collaborate. Assess revenue and client impact. Coordinate communication.	N/A – collaborative decision.	All staff and affected clients informed.

Template 14 – Weather Calls				
Decision	Authority	Criteria	Escalation Trigger	Info Flow



**All 15 Decision Rights Templates- continued**

Chapter 5 · "The Decision Rights Matrix" – templates explained at the beginning of Chapter 5.

Each template: EXAMPLE (pre-filled) followed by YOUR COMPANY (blank).

Thresholds calibrated for \$6M-\$10M. Adjust up or down for your revenue stage.

Template 15 – Overtime Approval				
Decision	Authority	Criteria	Escalation Trigger	Info Flow
OT up to 2 hours	Crew Leader	Job 75%+ complete. Finishing avoids a return trip. OR Tier 1 account has visible service gap.	OT exceeds 2 hours per crew per day.	O/M notified via text before OT begins.
OT 2-4 hours	Ops Manager	Strategic need documented. Crew leader has flagged and requested.	Saturday or extended OT (>4 hrs) or > Weekly OT budget.	Owner: weekly dashboard.
Saturday / extended OT	Owner	Assess revenue justification and crew capacity carefully.	N/A – Owner-level.	O/M coordinates with crew leaders.

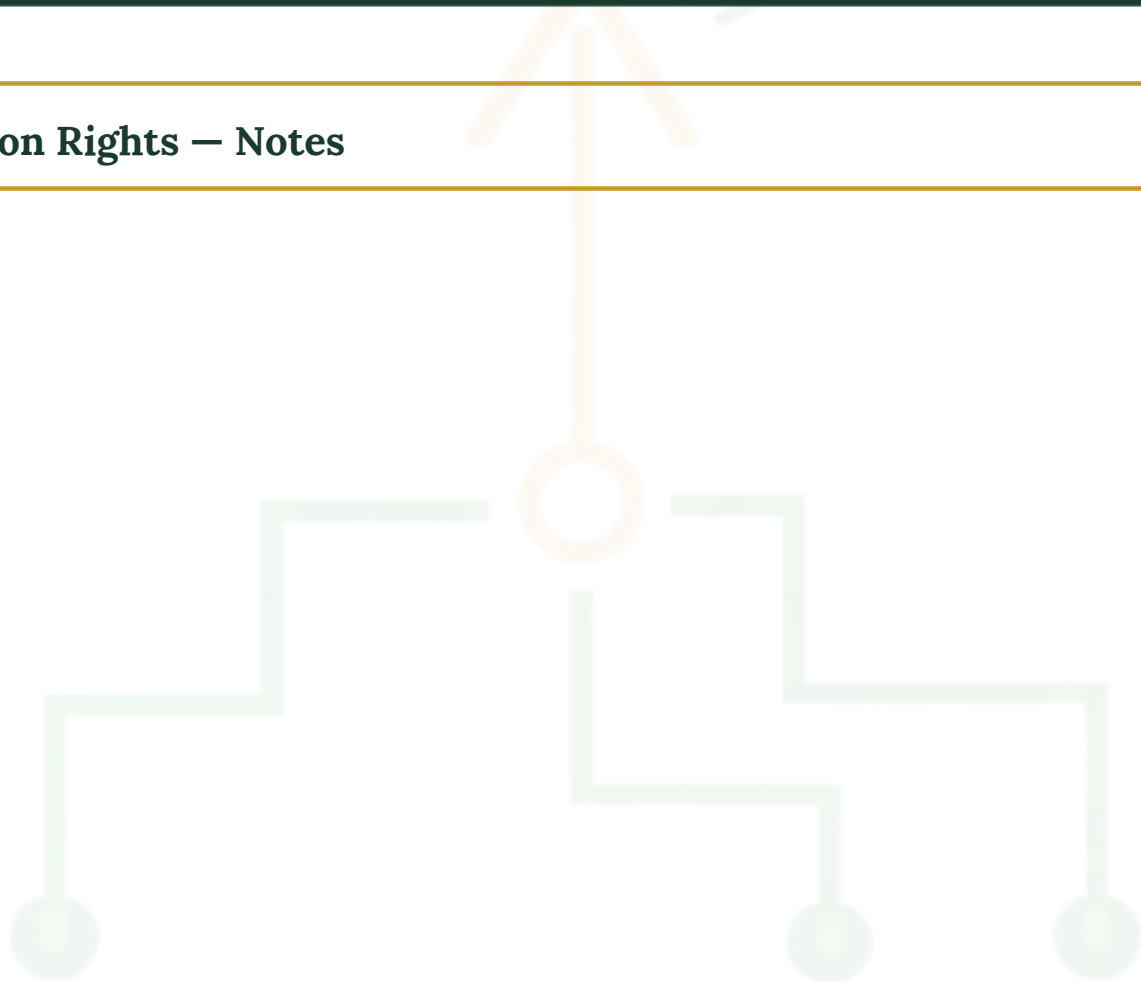
Template 15 – Overtime Approval				
Decision	Authority	Criteria	Escalation Trigger	Info Flow



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**Decision Rights – Notes**

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