AXIOM WORKS GROUP / PRACTICAL BUSINESS TOOLS

THE SMALL BUSINESS REVENUE LEAK FINDER

A practical 45-minute audit and 30-day action plan

FIND THE GAP / DO THE MATH / RUN A TEST

Designed for owners and managers of existing small businesses.
No paid service is required to use this workbook.

PROVEN PRINCIPLES PUT INTO PRACTICE

45-MINUTE BUSINESS AUDIT

HOW TO USE THIS WORKBOOK

Choose one recent representative month. Choose one location, service line or customer path. Use unique legitimate inquiries rather than ad clicks. If exact records are missing, mark estimates as estimates.

YOUR 45-MINUTE AGENDA

Minutes 0-10: Gather actual inquiry, booking, attendance, proposal and customer counts.

Minutes 10-20: Calculate the transitions.

Minutes 20-30: Check contribution and the illustrative scenario.

Minutes 30-40: Select one operational improvement.

Minutes 40-45: Give one person ownership of the next 30 days.

STARTING FACTS

Business/service: _____

Period measured: _____ Responsible owner: _____

Main channel or location: _____

WHAT COUNTS

Inquiries: unique genuine potential customers who initiated contact.

Bookings: agreed next steps or appointments, not merely invitations.

Held: real completed appointments or meaningful sales conversations.

Proposals: substantive quotes or offers.

Customers: new completed sales, not just accepted quotes.

PRIVACY

Do not send sensitive financial statements, customer lists, payroll or banking details to AWG. Figures entered into the online calculator remain in your browser.

MAP THE CUSTOMER JOURNEY

RECORD A REPRESENTATIVE MONTH

INQUIRIES: _____

APPOINTMENTS BOOKED: _____

APPOINTMENTS HELD: _____

PROPOSALS / QUOTES: _____

NEW PAYING CUSTOMERS: _____

CALCULATE EACH HANDOFF

Inquiry to booked = booked divided by inquiries x 100.

Booked to held = held divided by booked x 100.

Held to proposal = proposals divided by held x 100.

Proposal to customer = customers divided by proposals x 100.

YOUR NUMBERS

Inquiries to booked: _____ %

Booked to held: _____ %

Held to proposal: _____ %

Proposal to customer:_____ %

HOW TO INTERPRET

A low stage conversion may be a problem with message, availability, response, fit, process or capacity. Ask what happens at that exact transition. Do not use a made-up industry benchmark. Compare this month with a subsequent, consistently measured month.

QUESTION

Where do we lose the largest number of worthwhile opportunities that we could reasonably influence? _____

RUN THE CONTRIBUTION MATH

KEY FINANCIAL TERMS

Contribution per customer = average sale revenue less variable delivery costs for that sale.

Examples of variable costs: product cost, direct labor that only occurs with the sale, commission and payment processing.

Contribution is not net profit. Fixed overhead, interest, income taxes and owner economics remain.

ILLUSTRATIVE BUSINESS

200 genuine inquiries / 80 booked / 60 held / 48 proposals / 24 new customers.

Current booking rate = 80 / 200 = 40%.

Current held rate = 60 / 80 = 75%.

Current proposal rate = 48 / 60 = 80%.

Current close rate = 24 / 48 = 50%.

ONE CHANGE TO TEST

Suppose booking rises from 40% to 50%, a gain of 10 percentage points.

200 inquiries x 50% = 100 booked.

100 booked x 75% held x 80% proposed x 50% closed = 30 customers.

That is 6 additional customers in this mathematical example.

COST AND CONTRIBUTION

Average sale: $500. Direct variable cost: $200.

Contribution per customer: $500 - $200 = $300.

6 more customers x $300 = $1,800 additional contribution before any incremental costs.

IMPORTANT LIMIT

Do not treat this as AWG client results or a prediction. Capacity, extra labor, discounting or higher ad spend could change the economics.

WHAT IS YOUR OPPORTUNITY?

YOUR OWN SALES ECONOMICS

Average revenue per new customer: $_____

Variable cost per customer: - $_____

Contribution per customer: = $_____

New customers this month: _____

Total contribution before fixed overhead: $_____

Marketing/acquisition spending this month: - $_____

Contribution after marketing: $_____

YOUR HYPOTHETICAL CHANGE

Which single stage will we try to improve? _____

Current stage conversion: _____ %

Test conversion: _____ %

Number reaching stage today: _____

Number reaching stage if test works: _____

Later stage conversion assumptions: _____

Implied additional customers (directional): _____

Additional contribution before new costs: $_____

COST TO ACQUIRE A CUSTOMER

Customer acquisition cost = attributable acquisition spending / attributable new customers.

Include agency fees and campaign production when relevant, not just ad spend. When a sale has multiple influences, be clear about the attribution method.

DECISION RULE

Do not increase spend only because a spreadsheet shows potential gross sales. Check available cash, service capacity, direct costs and whether the business can fulfill additional demand.

FIVE HIGH-LEVERAGE CHECKS

CHECK 1 - INQUIRY RESPONSE

What share of genuine inquiries receives a useful response during business hours? Are missed calls returned? Does every lead have one accountable owner?

One-week test: assign each inquiry; check unanswered items at day end.

Baseline: _____ Next review: _____

CHECK 2 - THE NEXT STEP

Does the buyer know what to do next? Is a quote followed by an agreed decision date? Is the appointment requested with a clear benefit?

One-week test: replace vague follow-up with one specific next step.

Baseline: _____ Next review: _____

CHECK 3 - NO-SHOWS AND PROPOSALS

Which appointments were confirmed? What percentage happened? Which proposals have never received a useful follow-up?

One-week test: use consent-appropriate reminders and a named proposal follow-up owner.

Baseline: _____ Next review: _____

CHECK 4 - CONTRIBUTION MARGIN

Which popular services consume disproportionate time, materials, commissions or rework? Are discounts hiding thin margins?

One-week test: price a representative sale from actual variable costs.

Baseline: _____ Next review: _____

CHECK 5 - CASH TIMING

Will cash from delivered services arrive before payroll, suppliers and loan payments are due? Which receivables are late?

One-week test: build a four-week receipts and payments forecast.

Baseline: _____ Next review: _____

USEFUL FOLLOW-UP LANGUAGE

NEW INQUIRY RESPONSE

Thanks for reaching out to [Business] about [topic]. The next useful step is [specific step]. Would [option A] or [option B] work better for you?

AFTER A PROPOSAL

I am checking in on the [service or quote] we discussed. Is there anything about the scope or timing that would help you make a decision? I am happy to clarify what is included.

AFTER SATISFACTORY SERVICE

I am glad we could help with [outcome]. If another owner faces a similar issue, you are welcome to pass along our information. No pressure.

OPERATING GUARDRAILS

Send messages only through lawful, permission-appropriate channels. An optional phone number supplied for a workbook is not permission to send marketing texts. For commercial email, follow FTC CAN-SPAM guidance and honor opt-outs.

WEEKLY SCORECARD

W1 W2 W3 W4

Inquiries _____ _____ _____ _____

Booked _____ _____ _____ _____

Held _____ _____ _____ _____

Customers _____ _____ _____ _____

Main lesson: _____

BREAK-EVEN AND CASH VISIBILITY

UNIT BREAK-EVEN

Break-even units = fixed costs / (price per unit - variable cost per unit).

Only use this directly when units are comparable and the denominator is positive. Complex businesses should use properly weighted contribution margin and qualified financial advice.

YOUR SIMPLE UNIT CHECK

Fixed monthly operating costs: $_____

Price per unit or comparable service: $_____

Variable cost per unit: -$_____

Contribution per unit: =$_____

Break-even units: _____

FOUR-WEEK CASH FORECAST

WEEK 1 WEEK 2 WEEK 3 WEEK 4

Opening cash _____ _____ _____ _____

Expected collections _____ _____ _____ _____

Expected payments _____ _____ _____ _____

Ending cash _____ _____ _____ _____

FORMULA

Ending cash = opening cash + receipts - payments. The ending cash of each week becomes the next opening balance. Keep taxes, loan payments and reserves visible. This is a working forecast, not a cash guarantee.

CHECK YOUR DECISION

Does a proposed marketing or staffing change create a cash shortfall before the incremental revenue arrives? Is capacity actually available?

YOUR 30-DAY IMPROVEMENT PLAN

ONE BOTTLENECK; ONE TEST

Our largest observed leak: _____

Evidence (counts and stage rate): _____

Our hypothesis about the cause: _____

Single process change to test: _____

Person responsible: _____ Start date: _____

Baseline metric: _____ Test target: _____

Weekly review day: _____ Finish date: _____

DAYS 1 TO 7

Validate baseline counts, agree on the one test, assign ownership and make sure new inquiries can be traced.

DAYS 8 TO 14

Run the change consistently. Capture what staff actually did and what customers actually chose.

DAYS 15 TO 21

Review stage metrics, extra costs, staffing and capacity. Correct execution errors without moving the goalpost.

DAYS 22 TO 30

Compare to baseline. Decide: keep, adjust, stop or test a different bottleneck.

FINAL CHECK

Did the stage improve? Did additional sales generate worthwhile contribution after incremental costs? Is the process sustainable without harming customer service?

SOURCES AND NEXT STEP

WHY THESE SOURCES

This workbook uses standard business planning and unit-economics concepts, not fabricated marketing performance benchmarks. Numerical examples are illustrative only.

REFERENCES

1. US Small Business Administration, Plan your business:

https://www.sba.gov/counseling/plan-your-business/

2. US Small Business Administration, Break Even Calculator:

https://bec.www.sba.gov/breakevenpointcalculator

3. US Small Business Administration, Manage your business:

https://www.sba.gov/counseling/manage-your-business/

4. Federal Trade Commission, CAN-SPAM compliance guidance:

https://www.ftc.gov/business-guidance/resources/can-spam-act-compliance-guide-business

WHEN YOU WANT A SECOND SET OF EYES

Axiom Works Group works with business owners on growth, marketing, acquisition and practical operational improvement. If you want to discuss what you found, visit:

https://axiomworksgroup.com/contact/

IMPORTANT

This is educational material, not tax, legal, lender or accounting advice. It is not a guarantee of sales or profit. No client financial data is needed to use it.

PROVEN PRINCIPLES PUT INTO PRACTICE

Axiom Works Group LLC | 2026