Rock Hunt

November 2026

Total Tech Shift Audit

Prepared for Pinecrest Home Center

Manufactured home retail dealership, about $3.6 million in yearly sales

Sample report. The company, people and figures in this report are illustrative and were created to show what a Total Tech Shift Audit delivers.

Prepared by Rock Hunt, founder of SystemShift. hirerockhunt.com

A note before you start

Dale,

Thank you for opening up the business to me for two full days. Your team was honest with me, and that honesty is what makes this report useful.

Here is the short version. You run a good dealership with a team that cares. The leaks I found are not people problems. They are setup problems. Buyers who reach out at night wait until the next afternoon. Calls go unanswered. Warm buyers sit for weeks. Deals fall apart because a document came in late. None of that shows up on a sales report, so it has been invisible.

I graded 20 focus areas across four parts of the business: marketing, operations, customer service, and technology and risk. Your overall Tech Shift Score is **39 out of 100**. That sounds rough, but most growing businesses score in this range the first time, and every point in this report can be fixed.

My expected estimate is that fixing what's in here adds about **$159,895** a year to your EBITDA. The conservative estimate is half that. Every dollar figure is labeled so you can see exactly what I measured, what comes from industry research, and what I assumed.

One thing is already done. The instant reply for new inquiries, the biggest leak in this report, is built and running on a test number. Tab 4 and the Live Automation pages show how it works.

Read the Executive Summary first. Then go to Tab 4. After that, take your time.

Rock Hunt

How to read this report

Every number has a label

Measured on site I counted, timed or pulled it from your systems during the audit.

Industry benchmark It comes from published research. Sources are listed in Appendix F.

Assumption It's my estimate. You can change it, and the math changes with it.

Grades

The audit covers 20 focus areas, five in each of four parts of the business: Marketing, Operations, Customer Service, and Technology and Risk. Each one has its own tab and is scored on four checkpoints from 1 to 5, based on evidence: an export, a timed task, a test lead or a document. Never a self-rating. The average becomes a letter grade.

Average score	Grade	What it means
4.5 to 5.0	A	Strong. Keep it running.
3.5 to 4.4	B	Good, with small gaps.
2.5 to 3.4	C	Works, but costs you time or money.
1.5 to 2.4	D	Leaking money or creating risk.
Below 1.5	F	Fix this first.

Each tab follows the same five pages

1. **Tab page.** The grade, the one-line verdict and the key number.
2. **How I checked.** What I reviewed, who I talked to, and the four scored checkpoints.
3. **Findings.** What I found and the evidence behind it.
4. **The numbers.** Measurements, the math and a chart.
5. **The fix.** Actions with effort, cost, owner and timing, plus one quick win.

How you receive it

- A printed copy, handed to you at the readout
- The same report as a PDF, sent the same day
- A private web version with every grade and finding
- A recording of the readout meeting
- A 30-day check-in against the baselines in Appendix D

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The 20 focus areas, by part of the business

Marketing

1	Lead Sources and Ad Spend	D
2	Website	C
3	Google Profile and Local Search	D+
4	Speed to Lead	F
5	Follow-Up and Pipeline	D-

Operations

6	Workflows and Manual Work	D
7	Financing and Paperwork	D
8	Inventory and Floor Plan	D+
9	Reporting and Numbers	D
10	Team Communication	C

Customer Service

11	Phones and Missed Calls	D-
12	Customer Records (CRM)	D
13	Delivery, Setup and Service	C-
14	Status Updates to Buyers	D
15	Past Customers and Reviews	D

Technology and Risk

16	Software Stack and Spend	C-
17	AI Use and Readiness	D
18	Data Security	D-
19	Accounts and Backups	D
20	Policy and Compliance	D

Executive summary

39	$159,895	$79,947	25x
Tech Shift Score out of 100	expected yearly EBITDA gain	conservative yearly EBITDA gain	expected return on the audit fee

What's going on

Pinecrest Home Center sells about 30 homes a year from one lot with eight people. The business runs on effort: good salespeople, an office manager who holds every deal together, and an owner who builds the numbers by hand every Monday.

The tools haven't kept up. Buyer information lives in five places. Nobody answers new inquiries at night. One in four calls is missed. Most open buyers have heard from you once. None of it shows up on a sales report, so it has stayed invisible.

The biggest leak

Speed to lead. 38% of inquiries arrive after hours, and the median wait for a reply is 21 hours. Three of eight test buyers never heard back at all. The fix is already built.

The three lowest grades

4. Speed to Lead F

This is the biggest leak in the business. A buyer who inquires at 7 pm hears back the next afternoon, if at all.

5. Follow-Up and Pipeline D-

212 buyers who raised their hand have not heard from you in over two weeks.

11. Phones and Missed Calls D-

About one in four calls goes unanswered, and most of those callers never leave a voicemail.

What to do first

1. Turn on the instant reply and missed-call text back.
2. Turn on two-step login and close old accounts.
3. Cancel the dead tools and pause Zillow.
4. Load every buyer into one CRM.
5. Start the 20-minute Monday huddle.

Scorecard

Twenty focus areas in four parts of the business, each scored from four evidence-based checkpoints. Overall Tech Shift Score: **39 / 100**.

Marketing

average 1.90

1	Lead Sources and Ad Spend	D	2.00
2	Website	C	2.75
3	Google Profile and Local Search	D+	2.25
4	Speed to Lead	F	1.00
5	Follow-Up and Pipeline	D-	1.50

Operations

average 2.15

6	Workflows and Manual Work	D	2.00
7	Financing and Paperwork	D	2.00
8	Inventory and Floor Plan	D+	2.25
9	Reporting and Numbers	D	1.75
10	Team Communication	C	2.75

Customer Service

average 1.90

11	Phones and Missed Calls	D-	1.50
12	Customer Records (CRM)	D	1.75
13	Delivery, Setup and Service	C-	2.50
14	Status Updates to Buyers	D	1.75
15	Past Customers and Reviews	D	2.00

Technology and Risk

average 1.90

16	Software Stack and Spend	C-	2.50
17	AI Use and Readiness	D	1.75
18	Data Security	D-	1.50
19	Accounts and Backups	D	2.00
20	Policy and Compliance	D	1.75

Score shown is the average of four checkpoints on a 1 to 5 scale. The overall score is that average across all 20 focus areas, times 20.

The biggest leak: speed to lead

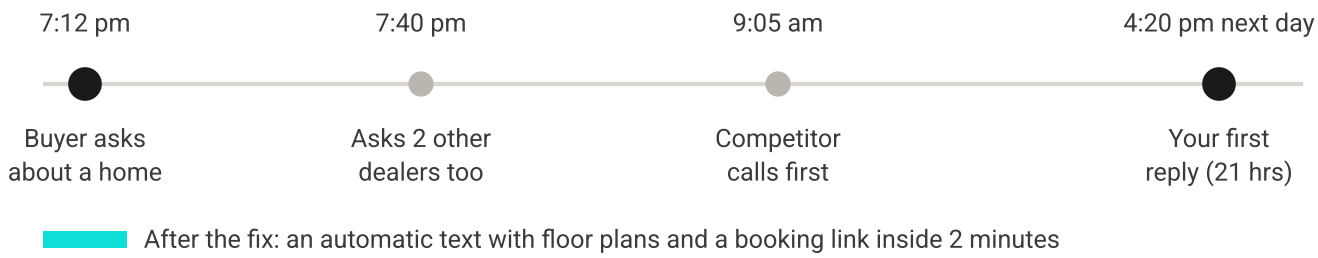
Out of everything in this report, this one costs the most and is the cheapest to fix.

38%
of inquiries arrive after hours
Measured on site

21 hrs
median after-hours reply
Measured on site

3 of 8
test buyers never answered
Measured on site

What an evening inquiry looks like today



A buyer who finds a home on MHVillage at night usually sends the same message to two or three dealers. Whoever responds first gets the visit. Today that's rarely you, and it isn't because your team is slow. Nobody is working at 7 pm on a Tuesday.

Why it matters and what it's worth

What the research says

Calling within 5 minutes instead of 30 gives about 100 times the odds of reaching the person (MIT/InsideSales) Industry benchmark.

Companies that replied within an hour were about 7 times more likely to have a real conversation with the buyer than those that waited even one more hour (Harvard Business Review, 2011) Industry benchmark.

Manufactured home buyers face loan approval rates under 30% (CFPB) Industry benchmark. When a buyer is approved and ready, losing them to a slow reply hurts twice.

The math, kept small on purpose

Internet leads per year (78 a month x 12)	**936**
Current internet close rate	**2.6%**
Close rate with under-5-minute response (assumed)	**2.8%**
Extra homes per year (936 x 0.2 points)	**about 2**
Gross profit, 2 homes x $28,800	**$57,600**
Less sales commission at 20% of gross	**-$11,520**
Added to EBITDA each year	**$46,080**

The close-rate lift is an assumption and is set low on purpose. The benchmark gains are much larger than 0.2 points.

Already done

The instant-reply automation was built during the audit and has been running on a test number. Every inquiry gets a text in under 2 minutes with floor plans, a link to book a visit, and an alert to the salesperson on duty. See the Live Automation pages near the back.

Financial impact

Every figure ties back to a tab. Revenue items count gross profit after a 20% sales commission. Conservative is half of expected.

Item	Where	Driver	Expected per year	Conservative
More homes sold				
Faster response to new inquiries	Tab 4	2 homes	$46,080	$23,040
Missed-call text back	Tab 11	0.5 homes	$11,520	$5,760
Follow-up on stalled buyers	Tab 5	1 home	$23,040	$11,520
Deals saved from paperwork failures	Tab 7	1 home	$23,040	$11,520
Past-buyer referrals	Tab 15	0.5 homes	$11,520	$5,760
Subtotal, more homes sold (5 homes)			**$115,200**	**$57,600**
Costs removed				
Manual work recovered (65% of 1,225 hours)	Tab 6	cost	$27,415	$13,708
Software waste removed	Tab 16	cost	$7,320	$3,660
Zillow spend cut	Tab 1	cost	$5,400	$2,700
Aged inventory interest avoided	Tab 8	cost	$4,560	$2,280
Subtotal, costs removed			**$44,695**	**$22,348**
Total yearly EBITDA gain			**$159,895**	**$79,948**

What's not counted

Risk avoided in Tabs 17, 18, 19 and 20 is not given a dollar value, even though a single data breach, a lost domain or a texting lawsuit could cost more than everything above. Time saved in Tabs 9, 12, 13 and 14 is folded into the Tab 6 labor figure so nothing is counted twice.

Key assumptions you can change

Gross profit per home	$28,800 (24% of a $120,000 average sale) Assumption
Sales commission	20% of gross profit Assumption
Loaded labor rate	$34.43 an hour (wage x 1.35) Industry benchmark
Share of manual hours recovered	65% Assumption

EBITDA and what the business is worth

EBITDA is your earnings before interest, taxes, depreciation and amortization. It's the number buyers and lenders use to value a business like yours.

$288,000
estimated EBITDA today (8% of sales)
Assumption

$447,895
after the expected gains

+56%
change in yearly earnings

Effect on value

Expected yearly EBITDA gain	**$159,895**
Multiple for a business this size (assumed, 2.5x to 3.5x)	**3x**
Added value, expected	**$479,685**
Added value, conservative	**$239,842**

Businesses under about $5 million in sales usually sell on a multiple of seller's earnings. Published 2025 averages ran around 2.6x seller's earnings and about 4x EBITDA for companies with $2 to $5 million in sales Industry benchmark. One manufactured home dealership was listed at about 5x cash flow. Use 3x as a middle estimate.

Return on this audit

Audit fee (sample)	**$6,500**
Expected return in year one	**24.6x**
Conservative return in year one	**12.3x**
Months to pay back, conservative	**1.0**

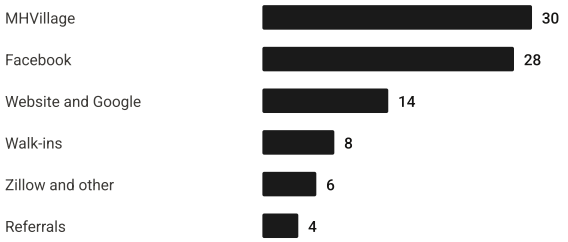
These gains only show up if the fixes get built. That's why the roadmap names an owner and a date for every item, and why the 30-day check-in measures against the same baselines I timed on site.

Business snapshot

The business

Yearly sales	$3.6 million Measured on site
Homes sold last year	30 Measured on site
Average sale	about $120,000, home plus setup Measured on site
Average new home price, US 2024	$123,300 Industry benchmark
Gross profit per home	$28,800 Assumption
Homes on the lot	14 Measured on site
Team	8: owner, 3 sales, office manager, receptionist, 2 setup and service Measured on site
Leads per month	90 Measured on site
Monthly lead spend	$4,100 Measured on site
Software spend per year	$27,960 across 17 tools Measured on site

Where leads come from each month



How a sale moves

Inquiry, visit, credit application, approval, signed deal, factory order, delivery, setup, service. A typical buyer takes 30 to 90 days from first contact to a signed deal, then another 30 to 90 days to move in Assumption.

How the audit ran

When	What happened
Before the visit	Intake questionnaire, read-only access to email, phone, MHVillage and ad accounts, 12 months of statements, and the anonymous staff survey on AI use (3 days, with amnesty in writing)
Days 1 to 6	8 test inquiries and 6 test calls at different hours, without the team knowing which were tests
Day 1, on site	Owner interview, office manager walkthrough, shadowing sales, timing the first workflows
Day 2, on site	Service and setup review, interviews with every team member, security and account checks, remaining workflow timings
Days 3 and 4, remote	Analysis, scoring, the money math, building the live automation, writing this report
Readout	90 minutes: walk through the report, watch the automation run, agree on the first 30 days

Evidence gathered

8 people interviewed	17 software accounts reviewed	270 leads analyzed	412 calls in the log
41 deal files reviewed	14 tests run as a buyer	5 workflows timed	20 sections graded

Confidentiality

Staff interviews are reported as themes only. No quote in this report is tied to a name, and no individual's survey answers were shared with the owner.

Part 1 of 4

Marketing

How buyers find you, what they see first, and how fast and how often you get back to them.

Average score 1.90 of 5 across five focus areas

Tab	Focus area	Grade	Key number
1	Lead Sources and Ad Spend	D	$0 sales from Zillow after $5,400 spent last year
2	Website	C	3 taps to reach the inventory from the homepage on a phone
3	Google Profile and Local Search	D+	about 50% of the Google profile filled in
4	Speed to Lead	F	21 hrs median response to an after-hours inquiry
5	Follow-Up and Pipeline	D-	212 open buyers untouched for 14+ days

1

Lead Sources and Ad Spend

D

Score 2.00 of 5

You spend $4,100 a month on leads and can't say which source sells homes. One source produced zero sales last year.

$0

sales from Zillow after $5,400 spent last year

Where buyers come from, what each source costs, and how many homes each one actually sells.

1. How I checked

What I reviewed

- Pulled 12 months of ad and listing invoices
- Exported every lead we could find from email, MHVillage, Facebook and the website form
- Matched the 30 homes sold last year back to their first lead source using deal files
- Interviewed sales on how they log where a buyer came from

Who I talked to

Owner, 3 salespeople, office manager

Time spent

3 hours on site, 4 hours remote

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Every lead has a source recorded	Source captured at first contact	Source recorded on 41% of leads	●●○○○ 2
Cost per lead known by source	Monthly cost per lead by source	Not tracked	●○○○○ 1
Cost per sale known by source	Yearly cost per home sold by source	Not tracked	●○○○○ 1
Spend moves to what works	Budget shifts each quarter based on results	Same budget for 2 years	●●●●○ 4

Average of the four checkpoints: 2.00 of 5, grade D.

1. Findings

1. Zillow costs $450 a month and sold nothing

We traced all 30 sales to a first source. Zillow sent 71 leads last year and none bought. That is $5,400 a year with no return.

Evidence: Invoices, lead export, deal files

2. MHVillage and walk-ins carry the business

MHVillage started 11 of the 30 sales and walk-ins started 8. Facebook started 6, referrals 3, and Google 2. The budget does not reflect that.

Evidence: Deal files traced to first contact

3. Facebook leads live on one phone

Facebook Marketplace messages go to one salesperson's personal account. When he is off, nobody sees them. 28 leads a month depend on one phone.

Evidence: Interviews, Marketplace inbox review

1. The numbers

Measure	Value	Source
Monthly lead spend	**$4,100**	Measured on site
Leads per month, all sources	**90**	Measured on site
Leads with a recorded source	**41%**	Measured on site
Cost per lead, MHVillage	**$42**	Measured on site
Cost per home sold, MHVillage	**$1,364**	Measured on site
Cost per home sold, Zillow	**no sales**	Measured on site

The math

Zillow spend, 12 months	$5,400
Homes sold from Zillow leads	0
Yearly savings from cutting Zillow	$5,400

Counted in the Financial Impact summary as Marketing reallocation.

Homes sold last year by first lead source



1. The fix

Action	Effort	Cost	Owner	When
Make lead source a required field on every lead	Low	$0	Sales manager	Week 2
Pause Zillow and move part of the budget to MHVillage featured listings	Low	$0	Owner	Week 2
Move Facebook messages to a shared business inbox	Low	$0	Office manager	Week 1
Monthly cost-per-sale report by source	Medium	Part of rollout	Owner	Day 60

> ### Quick win
>
> Pause Zillow this month. It has had twelve months to sell a home.

What good looks like in 90 days

Every lead tagged with a source, and a one-page monthly report showing cost per home sold by source.

2

Website

C

Score 2.75 of 5

The website looks fine, but it hides the inventory and gives buyers no way to text you.

---

3 taps

to reach the inventory from the homepage on a phone

The website: how fast it loads, how easy the homes are to find on a phone, and how easy it is for a buyer to take the next step.

2. How I checked

What I reviewed

- Tested the website on a phone and a laptop
- Timed how long it took to find inventory, prices and the contact form
- Checked every page for a way to call, text or book a visit

Who I talked to

Owner, 1 salesperson

Time spent

1.5 hours remote

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Inventory easy to find on a phone	One tap from the homepage	3 taps, small buttons	●●●○○ 3
Clear next step on every page	Call, text and booking on every page	Contact page only	●●●○○ 3
Site loads fast on a phone	Under 3 seconds	About 5 seconds	●●●○○ 3
Buyers can text from the site	A text button on every page	Phone number and contact form only	●●○○○ 2

Average of the four checkpoints: 2.75 of 5, grade C.

2. Findings

1. Inventory is buried

Buyers come to see homes. On a phone it takes 3 taps to reach the inventory page.

Evidence: Phone test

2. No way to text from the site

The site has a contact form and a phone number. Many buyers would rather text, and that option isn't there.

Evidence: Site review

3. It's slow on a phone

The site takes about 5 seconds to load on a phone, mostly because the photos of homes are full size. Shrinking them is a small web change.

Evidence: Phone load test

2. The numbers

Measure	Value	Source
Taps to reach inventory on a phone	**3**	Measured on site
Phone load time	**about 5 seconds**	Measured on site
Pages with a call, text or booking button	**contact page only**	Measured on site

No separate dollar figure. Better conversion here feeds the lead numbers in Tabs 1 and 4.

Seconds to load on a phone



2. The fix

Action	Effort	Cost	Owner	When
Put inventory one tap from the homepage	Low	Small web change	Web provider	Day 30
Add text and booking buttons to every page	Low	Part of rollout	Rock	Day 30
Speed up the site (image sizes)	Low	Small web change	Web provider	Day 60

> ### Quick win
>
> Add a text button to the homepage this week. Buyers who would never fill out a form will text.

What good looks like in 90 days

Inventory one tap away, text and booking on every page, and a site that loads in under 3 seconds on a phone.

3

Google Profile and Local Search

D+

Score 2.25 of 5

Buyers searching 'mobile homes near me' find a half-finished Google profile, and two competitors show up on the map before you do.

---

about 50%

of the Google profile filled in

Your Google Business Profile, map results and reviews: what a buyer sees before they ever click to your website.

3. How I checked

What I reviewed

- Reviewed the Google Business Profile against what Google allows
- Searched for the business the way a buyer would from three different locations
- Compared your profile with the top 3 competitors on the map
- Read every review and every reply

Who I talked to

Owner, sales manager

Time spent

1.5 hours remote

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Google profile complete	Hours, photos, services, posts, Q&A	About half complete; last photo 14 months old	●●●○○ 3
Photos are current	New photos of homes every week	Newest photo is 14 months old	●●○○○ 2
Reviews get a reply	Every review answered within a few days	9 of 31 reviews have a reply	●●○○○ 2
You show up on the map	In the top 3 map results for 'mobile homes near me'	Not in the top 3; two competitors are	●●○○○ 2

Average of the four checkpoints: 2.25 of 5, grade D+.

3. Findings

1. The Google profile is half done

Missing services, no posts, and the newest photo is 14 months old. For a buyer searching 'mobile homes near me,' this is often the first thing they see.

Evidence: Google Business Profile review

2. You don't show up on the map

Searching 'mobile homes near me' from three spots around town, two competitors appeared in the top 3 map results and you did not. Google ranks local results on relevance, distance and prominence, and a complete, active profile helps with the first and the last.

Evidence: Local search test; Google Business Profile help

3. Reviews go unanswered

9 of your 31 reviews have a reply from the business. Buyers read the replies, especially on the bad ones, to see how you treat people when something goes wrong.

Evidence: Google review review

3. The numbers

Measure	Value	Source
Google profile completeness	**about 50%**	Measured on site
Newest Google photo	**14 months old**	Measured on site
Reviews with a reply	**9 of 31**	Measured on site
Top 3 map results for 'mobile homes near me'	**not listed**	Measured on site

No separate dollar figure. More buyers finding you on the map feeds the lead numbers in Tabs 1 and 4.

How complete the Google profile is



3. The fix

Action	Effort	Cost	Owner	When
Complete the Google profile and post weekly photos of new homes	Low	$0	Sales manager	Week 2
Reply to every review, starting with the oldest bad ones	Low	$0	Owner	Week 2
Add services, hours and a Q&A section	Low	$0	Sales manager	Week 2

> ### Quick win
>
> Upload 10 fresh photos to the Google profile this week.

What good looks like in 90 days

A complete Google profile with fresh photos every week, every review answered, and a spot in the top 3 map results.

4

Speed to Lead

F

Score 1.00 of 5

This is the biggest leak in the business. A buyer who inquires at 7 pm hears back the next afternoon, if at all.

---

21 hrs

median response to an after-hours inquiry

How fast a new inquiry gets a real response, day and night, by every channel buyers use.

4. How I checked

What I reviewed

- Sent 8 test inquiries across MHVillage, the website form, Facebook and phone, at different times and days
- Timed the first human response to each one
- Pulled timestamps on 270 real leads from the last 90 days
- Sat with sales during a morning to watch how overnight leads get worked

Who I talked to

3 salespeople, receptionist, owner

Time spent

Tests ran over 6 days; 2.5 hours on site

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Business-hours response under 5 minutes	First reply within 5 minutes	Median 6.4 hours	●○○○○ 1
After-hours inquiries get an instant reply	Automatic text within 2 minutes, human reply next morning	No auto reply. Median 21 hours.	●○○○○ 1
Every lead gets a response	100% of leads contacted	3 of 8 test leads never got a reply	●○○○○ 1
Someone owns each new lead	Lead assigned the moment it arrives	First salesperson to notice it takes it	●○○○○ 1

Average of the four checkpoints: 1.00 of 5, grade F.

4. Findings

1. 38% of leads arrive when nobody is working

Of 270 leads in 90 days, 103 came in after 6 pm or on Sunday. These are people browsing homes after work. They wait until mid-morning at best.

Evidence: Lead timestamps, 90-day export

2. Three test buyers were never answered

We sent 8 test inquiries. 5 got a reply, after 2, 4, 9, 19 and 26 hours. The 3 that came in through Facebook and the website form on a weekend never got a reply.

Evidence: Test lead log, Appendix B

3. Speed decides who gets the visit

Buyers send the same inquiry to two or three dealers. The research is clear: calling within 5 minutes instead of 30 gives 100 times the odds of reaching the person, and replying within an hour makes a real conversation about 7 times more likely.

Evidence: MIT/InsideSales study; Harvard Business Review, 2011

4. The numbers

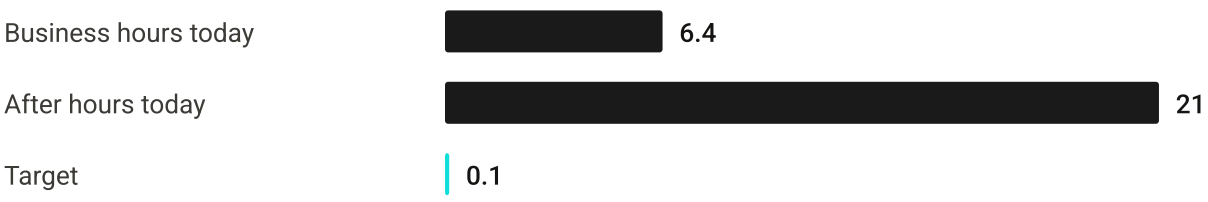
Measure	Value	Source
Leads per month	**90**	Measured on site
Share arriving after hours or Sunday	**38%**	Measured on site
Median response, business hours	**6.4 hours**	Measured on site
Median response, after hours	**21 hours**	Measured on site
Test leads never answered	**3 of 8**	Measured on site
Gross profit per home	**$28,800**	Assumption
Odds of contact, 5 min vs 30 min	**100x**	Industry benchmark

The math

Internet leads per year (78 a month x 12)	936
Current internet close rate	2.6%
Close rate with under-5-minute response (assumed)	2.8%
Extra homes per year (936 x 0.2 points)	about 2
Gross profit, 2 homes x $28,800	$57,600
Less sales commission at 20% of gross	-$11,520
Added to EBITDA each year	$46,080

The close-rate lift is an assumption and is set low on purpose. The benchmark gains are much larger than 0.2 points.

Median hours to first response



4. The fix

Action	Effort	Cost	Owner	When
Instant text reply to every inquiry, 24/7, with floor plans and a booking link	Medium	Built during the audit	Rock + office manager	Week 1
Round-robin assignment with a 5-minute alert to the on-duty salesperson	Medium	Part of rollout	Sales manager	Day 30
Weekend coverage schedule	Low	$0	Owner	Week 2
Daily speed-to-lead number on the morning report	Low	Part of rollout	Owner	Day 60

> ### Quick win
>
> The instant-reply automation is already built and running on your test number. Turn it on for every source this week.

What good looks like in 90 days

Every inquiry answered in under 2 minutes by text, and a salesperson calling inside 5 minutes during open hours.

5

Follow-Up and Pipeline

D-

Score 1.50 of 5

212 buyers who raised their hand have not heard from you in over two weeks.

212

open buyers untouched for 14+ days

How buyers move from inquiry to signed deal, how often they're followed up, and where they stall.

5. How I checked

What I reviewed

- Built a pipeline from the spreadsheet and deal folders: inquiry, visit, application, approved, signed, delivered
- Counted days since last contact for every open buyer
- Reviewed how many follow-up attempts each buyer got
- Interviewed sales on their follow-up routine

Who I talked to

3 salespeople, owner

Time spent

2.5 hours on site, 3 hours remote

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Pipeline stages are defined	Shared stages everyone uses	Each salesperson tracks differently	●●○○○ 2
Every buyer has a next step	Next task and date on every open buyer	Next step on 18% of buyers	●○○○○ 1
Follow-up happens on schedule	At least 6 touches in 30 days for active buyers	Average 1.6 touches	●○○○○ 1
Long-term buyers are nurtured	Monthly touch for buyers not ready yet	None	●●○○○ 2

Average of the four checkpoints: 1.50 of 5, grade D-.

5. Findings

1. Most buyers get one follow-up, then silence

The average open buyer got 1.6 contact attempts. Manufactured home buyers often shop for 3 months or more. One text and a call won't carry them that long.

Evidence: Spreadsheet notes, text history samples

2. 212 warm buyers are sitting still

Of 340 open buyers, 212 have had no contact in 14 days or more. These people already asked about a home. Nobody is working them.

Evidence: Pipeline rebuild

3. Not-ready buyers get dropped

Buyers who say 'maybe in the spring' or 'working on my credit' get no plan at all. That group is where next season's sales come from.

Evidence: Interviews

5. The numbers

Measure	Value	Source
Open buyers	**340**	Measured on site
Untouched 14+ days	**212**	Measured on site
Average follow-up attempts	**1.6**	Measured on site
Buyers with a next step set	**18%**	Measured on site
Homebuyers who search over 3 months (site-built)	**about two-thirds**	Industry benchmark

The math

Stale buyers re-engaged per year by automated follow-up (assumed)	**about 400**
Homes sold from re-engaged buyers (assumed 0.25%)	**1**
Gross profit	**$28,800**
Less commission at 20%	**-$5,760**
Added to EBITDA	**$23,040**

Assumes a modest 1 extra home per year from buyers who already raised their hand.

Open buyers by days since last contact



5. The fix

Action	Effort	Cost	Owner	When
Set 6 shared pipeline stages	Low	$0	Sales manager	Day 30
30-day follow-up sequence for active buyers (text, email, call tasks)	Medium	Part of rollout	Rock	Day 30
Monthly nurture for not-ready buyers, including credit-rebuild tips	Medium	Part of rollout	Rock	Day 60
Weekly pipeline review, 20 minutes	Low	$0	Owner + sales	Ongoing

> ### Quick win
>
> Split the 212 stale buyers among the salespeople and have each one send a personal text this week.

What good looks like in 90 days

Every open buyer has a next step, active buyers get 6 touches in 30 days, and nobody waits two weeks for a reply.

Part 2 of 4

Operations

How the work gets done behind the counter: paperwork, inventory, numbers and handoffs.

Average score 2.15 of 5 across five focus areas

Tab	Focus area	Grade	Key number
6	Workflows and Manual Work	D	24.5 hrs of manual work per week across the team
7	Financing and Paperwork	D	27% of signed deals that never funded
8	Inventory and Floor Plan	D+	5 homes on the lot over 180 days
9	Reporting and Numbers	D	2 of 8 core numbers the owner could answer on the spot
10	Team Communication	C	4 channels used to hand off work

6

Workflows and Manual Work

D

Score 2.00 of 5

Your team spends about 24 hours a week typing the same information into different places.

24.5 hrs

of manual work per week across the team

Timed baselines of the core jobs, where information gets retyped, and what that costs in payroll.

6. How I checked

What I reviewed

- Shadowed each role for part of a day
- Timed 5 core workflows from screen shares of real, recent tasks
- Counted every place the same information gets typed
- Used these timings as the baseline for the 30 and 90-day check-ins

Who I talked to

Every team member

Time spent

6 hours on site across 2 days

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Information is entered once	Typed once, flows everywhere	A buyer's details are typed into 4 to 6 places	●○○○○ 1
Reports build themselves	Weekly numbers update automatically	Owner builds a report by hand every Monday	●●○○○ 2
Work is documented	Written steps for each core job	Mostly in people's heads	●●○○○ 2
Time is measured	Baseline timings exist	Never measured before this audit	●●●○○ 3

Average of the four checkpoints: 2.00 of 5, grade D.

6. Findings

1. A buyer gets typed in six times

From inquiry to delivery, the same name, phone and address are typed into the spreadsheet, the credit application, the lender portal, the factory order, the title paperwork and the setup schedule.

Evidence: Workflow map, Appendix D

2. The office manager carries most of it

She spends about 9 hours a week retyping deal information. That is more than a full day every week.

Evidence: Timed baseline

3. Mondays start with spreadsheets

The owner spends about 3 hours every Monday pulling numbers from four places to see how last week went.

Evidence: Timed baseline

6. The numbers

Measure	Value	Source
Office manager retyping	**9.0 hrs/week**	Measured on site
Sales logging and lookups	**8.5 hrs/week (3 people)**	Measured on site
Service scheduling	**4.0 hrs/week**	Measured on site
Owner's Monday report	**3.0 hrs/week**	Measured on site
Total	**24.5 hrs/week**	Measured on site
Loaded cost multiplier, small employers	**about 1.36x wages**	Industry benchmark

The math

Hours per year (24.5 x 50 weeks)	1,225
Blended wage	$25.50/hr
Loaded rate (x 1.35)	$34.43/hr
Yearly cost of the manual work	$42,177
Recoverable with automation (assumed 65%)	$27,415

We count recovered hours as money only because the team said they would put that time into selling and follow-up. The number gets checked against these same timings at 30 and 90 days.

Manual hours per week by role



6. The fix

Action	Effort	Cost	Owner	When
Connect lead forms, CRM and deal tracker so buyer info is typed once	Medium	Part of rollout	Rock	Day 60
Auto-fill the factory order and title forms from the deal record	Medium	Part of rollout	Rock	Day 60
Automatic Monday report	Medium	Part of rollout	Rock	Day 30
Write down the 5 core workflows	Low	$0	Office manager	Day 30

> ### Quick win
>
> Stop the Monday report by hand. A simple dashboard can pull the same numbers on its own.

What good looks like in 90 days

Buyer information typed once, the Monday report automatic, and at least 15 hours a week back for the team.

7

Financing and Paperwork

D

Score 2.00 of 5

11 signed deals fell apart last year. Four of them died on paperwork, not credit.

27%

of signed deals that never funded

How loan packages, documents and approvals move between the buyer, the lender and the office, and where deals fall through.

7. How I checked

What I reviewed

- Reviewed 41 deal files from the last 12 months
- Mapped every step from credit application to funding
- Timed how long the office manager spends building one loan package
- Sorted every failed deal by reason

Who I talked to

Office manager, owner, 2 salespeople

Time spent

3 hours on site, 2 hours remote

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Document checklist per loan type	Written checklist for chattel, FHA, VA and land-home	Checklists exist only in the office manager's head	●●○○○ 2
Buyers know what's missing	Automatic reminders for missing documents	Calls when someone remembers	●●○○○ 2
Deal status is visible	Every deal's stage visible to sales and owner	Ask the office manager	●●○○○ 2
Approvals don't expire	Alerts before approvals and rate locks expire	Two approvals expired last year	●●○○○ 2

Average of the four checkpoints: 2.00 of 5, grade D.

7. Findings

1. Four deals died on paperwork

Of 11 failed deals, 7 failed on credit or appraisal, which is normal for this industry. 4 failed because documents came in late and the approval expired. Those 4 were winnable.

Evidence: 41 deal files, sorted by failure reason

2. One person holds the whole process

Every loan package runs through the office manager. She keeps the checklist in her head. When she was out for a week in August, no packages moved.

Evidence: Interviews

3. Financing is the hardest part of this business

Fewer than 30% of manufactured home loan applications are approved, compared with over 70% for site-built homes. When approval is that hard to get, losing an approved buyer to paperwork hurts twice.

Evidence: Consumer Financial Protection Bureau, 2021

7. The numbers

Measure	Value	Source
Signed deals, 12 months	**41**	Measured on site
Deals that never funded	**11 (27%)**	Measured on site
Failed on paperwork or expired approvals	**4**	Measured on site
Hours to build one loan package	**3.2**	Measured on site
Manufactured home loan applications approved	**under 30%**	Industry benchmark
Share of MH purchase loans that are chattel	**about 42%**	Industry benchmark

The math

Paperwork failures per year	4
Recovered with checklists and reminders (assumed half)	2
Counted conservatively	1
Gross profit	$28,800
Less commission at 20%	-$5,760
Added to EBITDA	$23,040

We count 1 recovered deal, not 2, to stay conservative.

Why signed deals failed



7. The fix

Action	Effort	Cost	Owner	When
Written document checklist for each loan type	Low	$0	Office manager	Week 2
Automatic missing-document reminders to buyers by text	Medium	Part of rollout	Rock	Day 30
Deal tracker visible to sales and owner	Medium	Part of rollout	Rock	Day 30
Approval expiration alerts 10 days out	Low	Part of rollout	Rock	Day 30

> ### Quick win
>
> Write down the document checklist for chattel loans this week. It's the loan type you see most.

What good looks like in 90 days

Every deal tracked by stage, buyers reminded automatically, and no approvals lost to paperwork.

8

Inventory and Floor Plan

D+

Score 2.25 of 5

Five homes have sat on the lot over 180 days, and the interest on them is paid every month whether anyone notices or not.

5

homes on the lot over 180 days

What's on the lot, how long it's been there, what it costs to carry, and who can see that today.

8. How I checked

What I reviewed

- Pulled the current inventory list and floor plan statements
- Calculated days on lot for each home
- Estimated monthly carrying cost per home
- Asked sales which homes they push and why

Who I talked to

Owner, office manager, 3 salespeople

Time spent

1.5 hours on site, 2 hours remote

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Days on lot are tracked	Aging report updated weekly	Checked when the floor plan statement arrives	●●○○○ 2
Carrying cost is known per home	Cost per home per month visible	Not calculated	●●○○○ 2
Aged homes get a plan	Action at 90, 120 and 180 days	No set plan	●●○○○ 2
Sales see what to push	Aged homes flagged for the sales team	Sales push what they like	●●●○○ 3

Average of the four checkpoints: 2.25 of 5, grade D+.

8. Findings

1. Five homes past 180 days

Five homes have been on the lot more than 180 days. Floor plan curtailments are due on some of them, and interest builds every month.

Evidence: Inventory list, floor plan statements

2. Nobody sees the cost

The floor plan statement goes to the owner's email once a month. Sales never see which homes are costing the most to hold.

Evidence: Interviews

3. Aged homes aren't marketed harder

None of the five aged homes had a price change, a featured listing or a new photo set in the last 60 days.

Evidence: Listing history on MHVillage and Facebook

8. The numbers

Measure	Value	Source
Homes on the lot	**14**	Measured on site
Over 180 days	**5**	Measured on site
Average floored amount, aged homes	**$96,000**	Measured on site
Floor plan rate (Prime + 2%, assumed)	**about 9.5%**	Assumption
Carrying cost per aged home	**about $760/month**	Assumption

The math

Interest per aged home per month	$760
Aged homes sold 60 days sooner with weekly visibility (assumed 3)	3
3 homes x 2 months x $760	$4,560

Prime rate was not checked for this sample. Confirm the real floor plan rate before using this number.

Homes on the lot by days on lot



8. The fix

Action	Effort	Cost	Owner	When
Weekly aging report with carrying cost per home	Low	Part of rollout	Rock	Day 30
Aged-home playbook at 90, 120 and 180 days	Low	$0	Owner	Day 30
Flag aged homes in the sales team's daily list	Low	Part of rollout	Rock	Day 60
Fresh photos and featured listings for homes over 120 days	Low	Small cost	Sales manager	Week 2

Quick win

Reshoot photos and feature the five aged homes on MHVillage this week.

What good looks like in 90 days

A weekly aging report everyone sees, and no home sitting past 180 days without a plan.

9

Reporting and Numbers

D

Score 1.75 of 5

You know your monthly sales. You don't know your cost per home sold, your close rate, or how fast leads get answered.

---

2 of 8

core numbers the owner could answer on the spot

Which numbers the owner can see, how fast, and whether they drive decisions.

9. How I checked

What I reviewed

- Asked the owner 8 questions about the business's numbers and timed the answers
- Reviewed the Monday report he builds by hand
- Checked which numbers could come straight from your tools
- Designed the one-page weekly report

Who I talked to

Owner, office manager

Time spent

1.5 hours on site, 2 hours remote

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Owner sees the core numbers weekly	One page, every Monday, automatic	Built by hand, 3 hours	●●○○○ 2
Close rate known by source	Close rate by lead source	Unknown	●○○○○ 1
Speed to lead measured	Median response time on the report	Never measured	●○○○○ 1
Numbers drive decisions	Budget and staffing follow the numbers	Decisions by feel	●●●○○ 3

Average of the four checkpoints: 1.75 of 5, grade D.

9. Findings

1. Two of eight

The owner could answer homes sold this month and cash in the bank. He could not answer cost per lead, cost per home sold, close rate, response time, aged inventory cost, or deals pending funding.

Evidence: Owner interview, timed

2. The report costs three hours and still misses things

The Monday report takes 3 hours and covers sales and inventory count. It leaves out leads, speed and pipeline.

Evidence: Report review

3. The data exists, it just isn't connected

Almost every number on the list already sits in a tool you pay for. Once the CRM is in place, the report can build itself.

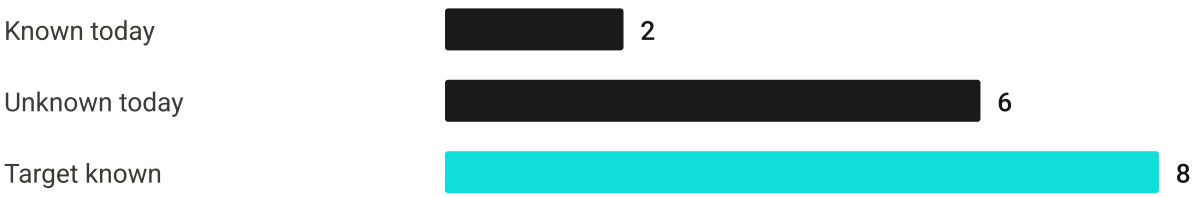
Evidence: Systems review

9. The numbers

Measure	Value	Source
Core numbers answered on the spot	**2 of 8**	Measured on site
Time to build the weekly report	**3 hours**	Measured on site
Numbers available in existing tools	**7 of 8**	Measured on site

Report time is counted in the Section 6 labor figure.

Owner's core numbers



9. The fix

Action	Effort	Cost	Owner	When
Automatic one-page Monday report with the 8 numbers	Medium	Part of rollout	Rock	Day 30
Add speed to lead and close rate by source	Low	Part of rollout	Rock	Day 60
Review the report in the Monday huddle	Low	$0	Owner	Ongoing
Quarterly budget review using cost per home sold	Low	$0	Owner	Day 90

> ### Quick win
>
> Start tracking the 8 numbers by hand this week, even roughly. The automatic version replaces it in 30 days.

What good looks like in 90 days

A one-page report that builds itself every Monday, and budget decisions made from it.

10

Team Communication

C

Score 2.75 of 5

The team talks through personal texts, a group chat and sticky notes. Things get said, but they don't get tracked.

4

channels used to hand off work

How the team passes information, assigns work and confirms it got done.

10. How I checked

What I reviewed

- Mapped how a handoff moves from sales to the office to service
- Reviewed the team group chat for one month
- Asked each person where they look first for a task
- Counted handoffs that needed a follow-up question

Who I talked to

Every team member

Time spent

1.5 hours on site

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Handoffs happen in one place	Tasks assigned in one tool	Texts, group chat, email and sticky notes	●●○○○ 2
Tasks have an owner and a date	Every task assigned and dated	Rarely	●●●○○ 3
Customer info isn't in personal texts	Customer details stay in business systems	Often shared by personal text	●●●○○ 3
Weekly team check-in	Short weekly meeting with numbers	Happens when things go wrong	●●●○○ 3

Average of the four checkpoints: 2.75 of 5, grade C.

10. Findings

1. Handoffs need a second ask

In the month we reviewed, about half of the handoffs from sales to the office needed a follow-up question to get missing details.

Evidence: Group chat review

2. Customer data travels by personal text

Social Security numbers and pay stubs have been texted between personal phones. Section 18 covers why that's a risk.

Evidence: Interviews

3. No weekly rhythm

The team only meets when something breaks. A 20-minute weekly check-in with the numbers would catch most of what we found.

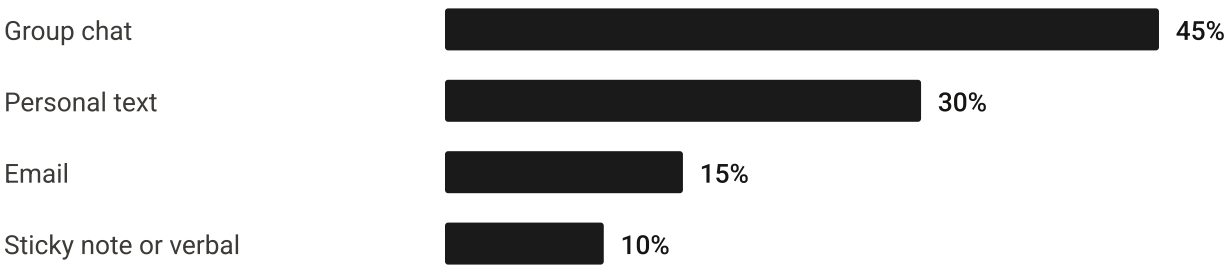
Evidence: Interviews

10. The numbers

Measure	Value	Source
Channels used for handoffs	**4**	Measured on site
Handoffs needing a follow-up question	**about 50%**	Measured on site
Scheduled team meetings	**0 per week**	Measured on site

No dollar figure is claimed for this section. The fixes support Sections 6, 7 and 18.

Where handoffs happen today



10. The fix

Action	Effort	Cost	Owner	When
One task tool tied to the CRM for handoffs	Low	Part of rollout	Office manager	Day 30
Handoff template: buyer, home, loan type, next step	Low	$0	Sales manager	Week 2
No customer documents by personal text	Low	$0	Owner	Week 1
20-minute Monday huddle with the automatic report	Low	$0	Owner	Week 2

> ### Quick win
>
> Start a 20-minute Monday huddle this week, using the numbers from this report.

What good looks like in 90 days

Every handoff in one place with an owner and a date, and a weekly huddle the team expects.

Part 3 of 4

Customer Service

How buyers are treated once they call, sign and move in, and whether they come back and send friends.

Average score 1.90 of 5 across five focus areas

Tab	Focus area	Grade	Key number
11	Phones and Missed Calls	D-	97 missed calls in 30 days
12	Customer Records (CRM)	D	5 places a single buyer's information is stored
13	Delivery, Setup and Service	C-	74 service requests last year, none in one system
14	Status Updates to Buyers	D	about 20% of calls to the main line are buyers asking for a status update
15	Past Customers and Reviews	D	186 past buyers with no contact after delivery

11

Phones and Missed Calls

D-

Score 1.50 of 5

About one in four calls goes unanswered, and most of those callers never leave a voicemail.

97

missed calls in 30 days

The phone system, how calls route, what happens when nobody picks up, and how many callers you lose.

11. How I checked

What I reviewed

- Pulled the 30-day call log from the phone system
- Called the main line 6 times at different hours as a buyer
- Mapped where calls ring and what happens after 4 rings
- Reviewed the voicemail setup and greeting

Who I talked to

Receptionist, owner, 2 salespeople

Time spent

1.5 hours on site, 2 hours remote

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Calls are answered or routed	95% answered or sent to a live backup	76% answered	●●○○○ 2
Missed callers get a text back	Automatic text within 1 minute	No text back	●○○○○ 1
After-hours callers have a next step	Text with booking link and hours	Voicemail box that was full on 2 of our test calls	●○○○○ 1
Call data is reviewed	Weekly missed-call report	Never reviewed	●●○○○ 2

Average of the four checkpoints: 1.50 of 5, grade D-.

11. Findings

1. 97 missed calls in one month

The log shows 412 inbound calls in 30 days. 97 were missed, and 58 of those callers hung up without leaving a message. Many are buyers calling about a home they saw online.

Evidence: Phone system call log

2. The voicemail box fills up

On 2 of our 6 test calls the voicemail was full. Those callers got no way to reach you at all.

Evidence: Test calls

3. Missed callers go elsewhere

Industry data shows only about 42% of missed callers leave a voicemail and about 21% call a competitor next. Without a text back, the next dealer on their list gets the visit.

Evidence: CallRail data, as summarized by a secondary source

11. The numbers

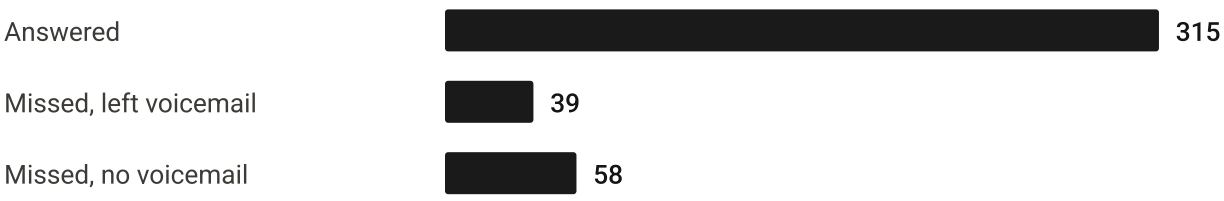
Measure	Value	Source
Inbound calls, 30 days	**412**	Measured on site
Missed calls	**97 (23.5%)**	Measured on site
Missed with no voicemail	**58**	Measured on site
Test calls reaching a full voicemail	**2 of 6**	Measured on site
Missed callers who call a competitor	**about 21%**	Industry benchmark

The math

Missed callers per year with no voicemail (58 x 12)	696
Share who are new buyers (assumed)	15%
New buyers lost per year	about 104
Homes recovered with text-back (assumed 0.5%)	0.5
Gross profit, 0.5 x $28,800	$14,400
Less commission at 20%	-$2,880
Added to EBITDA	$11,520

Kept small on purpose. Some of these callers overlap with the web leads in Section 4.

Calls in 30 days



11. The fix

Action	Effort	Cost	Owner	When
Missed-call text back with a booking link	Low	Built with the speed-to-lead automation	Rock	Week 1
Ring the sales team before voicemail	Low	$0	Office manager	Week 1
Clear the voicemail box daily and set a new greeting	Low	$0	Receptionist	Week 1
Weekly missed-call report	Low	Part of rollout	Owner	Day 30

> ### Quick win
>
> Turn on missed-call text back. Every caller you miss gets a text within a minute.

What good looks like in 90 days

Fewer than 10% of calls missed, and every missed caller texted back within one minute.

12

Customer Records (CRM)

D

Score 1.75 of 5

Your customer list lives in a spreadsheet, two inboxes, three phones and a stack of folders.

5

places a single buyer's information is stored

Where buyer information is kept, whether it's complete, and whether anyone can find a buyer's history in under a minute.

12. How I checked

What I reviewed

- Reviewed the lead spreadsheet, the email inboxes and the deal folders
- Picked 10 recent buyers and timed how long it took to find each one's full history
- Counted duplicate and incomplete records
- Checked the CRM features already included in tools you pay for

Who I talked to

Office manager, 3 salespeople

Time spent

3 hours on site

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
One place for every buyer	One CRM record per buyer	Spreadsheet, 2 inboxes, personal phones, paper folders	●○○○○ 1
Records are complete	Name, phone, email, source, stage on every record	Complete on 34% of spreadsheet rows	●●○○○ 2
History is findable	Full history in under 1 minute	Average 7 minutes 40 seconds	●●○○○ 2
No duplicates	Under 2% duplicates	11% duplicates	●●○○○ 2

Average of the four checkpoints: 1.75 of 5, grade D.

12. Findings

1. It took almost 8 minutes to find a buyer

We asked for the full history of 10 recent buyers. On average it took 7 minutes and 40 seconds, across the spreadsheet, two inboxes and a folder. Two histories were never fully found.

Evidence: Timed lookup test

2. You already pay for a CRM you don't use

The email marketing tool you pay for includes a contact database and pipeline. It is empty. The spreadsheet does that job instead.

Evidence: Tool settings, plan page

3. Leave a salesperson, lose the buyers

When a salesperson left in May, his texts and his Facebook messages left with him. About 40 open buyers were never followed up.

Evidence: Interviews, spreadsheet history

12. The numbers

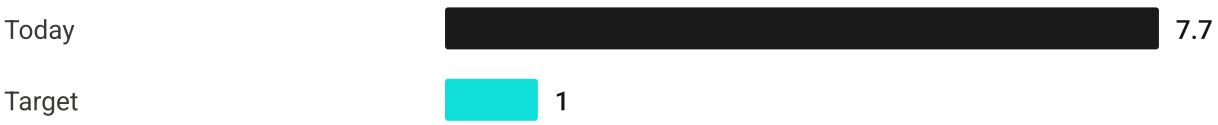
Measure	Value	Source
Places buyer data is stored	**5**	Measured on site
Complete records	**34%**	Measured on site
Duplicate records	**11%**	Measured on site
Average time to find a buyer's history	**7 min 40 sec**	Measured on site
Open buyers lost when a salesperson left	**about 40**	Measured on site

The math

Lookups per week, whole team (observed)	**about 60**
Minutes per lookup today vs target	7.7 vs 1
Hours lost per week	6.7
Counted in Section 6 labor total	**yes**

Time lost here is rolled into the Workflow and Manual Work labor figure so it isn't counted twice.

Minutes to find a buyer's full history



12. The fix

Action	Effort	Cost	Owner	When
Pick one CRM and load every open buyer	Medium	Part of rollout	Rock + office manager	Day 30
Connect MHVillage, the website and Facebook to the CRM	Medium	Part of rollout	Rock	Day 30
Required fields: phone, email, source, stage	Low	$0	Sales manager	Day 30
Business-owned phone numbers for every salesperson	Low	Small monthly cost	Owner	Day 30

> ### Quick win
>
> Merge the spreadsheet duplicates and add a Source column today. It takes one afternoon.

What good looks like in 90 days

Every buyer in one CRM, every new lead entering on its own, and any history found in under a minute.

13

Delivery, Setup and Service

C-

Score 2.50 of 5

Setups and service calls are scheduled on a whiteboard and by text, and some service requests slip through.

74

service requests last year, none in one system

How delivery, setup and warranty service get scheduled, tracked and documented.

13. How I checked

What I reviewed

- Reviewed the setup whiteboard, the service text threads and the paper work orders
- Counted service requests and how long each took to close
- Interviewed the setup and service techs

Who I talked to

2 setup/service techs, office manager

Time spent

1.5 hours on site, 1 hour remote

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Jobs live in one schedule	One shared schedule for setups and service	Whiteboard plus texts plus paper	●●○○○ 2
Service requests are tracked	Every request logged with a close date	Logged on paper, some lost	●●●○○ 3
Warranty items are documented	Photos and notes on every warranty job	Photos on the tech's personal phone	●●●○○ 3
Crews have the job details	Address, model and notes before they leave	Details passed by text the morning of the job	●●○○○ 2

Average of the four checkpoints: 2.50 of 5, grade C-.

13. Findings

1. Jobs live on a whiteboard

Every setup and service job is written on a whiteboard in the back and confirmed by text. When a crew runs late, nobody at the front desk knows.

Evidence: Whiteboard review, interviews

2. Service requests slip

We counted 74 service requests last year. 9 had no close date and 3 were still open after 60 days.

Evidence: Work orders, text threads

3. Warranty proof sits on one phone

Photos of setup work and warranty repairs live on the techs' personal phones. If a dispute comes up later, that proof can disappear. HUD's dispute program covers installation defects reported within a year.

Evidence: Interviews; HUD Manufactured Home Dispute Resolution program

13. The numbers

Measure	Value	Source
Service requests last year	**74**	Measured on site
Requests with no close date	**9**	Measured on site
Open over 60 days	**3**	Measured on site
Average days to close a service request	**16**	Measured on site

No separate dollar figure. Time saved on scheduling is part of the Tab 6 labor figure.

Days to close a service request



13. The fix

Action	Effort	Cost	Owner	When
One shared schedule for setup and service jobs	Low	Part of rollout	Office manager	Day 30
Service request form that creates a ticket	Low	Part of rollout	Rock	Day 30
Job photos saved to the buyer's record, not a phone	Low	$0	Service techs	Day 30

> ### Quick win
>
> Put the whiteboard into a shared calendar the receptionist can see from the front desk.

What good looks like in 90 days

Every job on one schedule, service requests closed in about a week, and warranty photos saved to the buyer's record.

14

Status Updates to Buyers

D

Score 1.75 of 5

Buyers ask 'when is my crew coming?' more than anything else, and they usually hear about a delay only when they call to ask.

about 20%

of calls to the main line are buyers asking for a status update

How buyers hear what's happening between signing and move-in, and how many phone calls that silence creates.

14. How I checked

What I reviewed

- Listened to 10 buyer calls asking for status
- Counted status calls in the 30-day call log
- Interviewed the receptionist and office manager
- Reviewed what a buyer receives after signing

Who I talked to

Receptionist, office manager, 2 setup/service techs

Time spent

1 hour on site, 1 hour remote

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Buyers get status updates	Automatic updates at each step	Buyers call to ask	●●○○○ 2
The front desk can answer 'when?'	The answer on screen in seconds	Has to walk to the whiteboard or text a tech	●●○○○ 2
Buyers get a timeline at signing	A simple written timeline from signing to move-in	Explained out loud, if at all	●●○○○ 2
Delays are shared before the buyer asks	A text the same day a date moves	The buyer finds out when they call	●○○○○ 1

Average of the four checkpoints: 1.75 of 5, grade D.

14. Findings

1. Status calls eat the receptionist's day

About 1 in 5 calls to the main line is a buyer asking when their setup or repair will happen. The answer is on a whiteboard in the back.

Evidence: Call sampling, interviews

2. Buyers hear about delays last

When a setup date moves, the buyer usually finds out when they call to ask. 3 of the 10 status calls I listened to were about a date that had already changed.

Evidence: Call sampling

3. No timeline after signing

Buyers sign and then wait weeks for delivery with nothing in writing about what happens next. Every question that follows turns into a phone call.

Evidence: Interviews, deal folders

14. The numbers

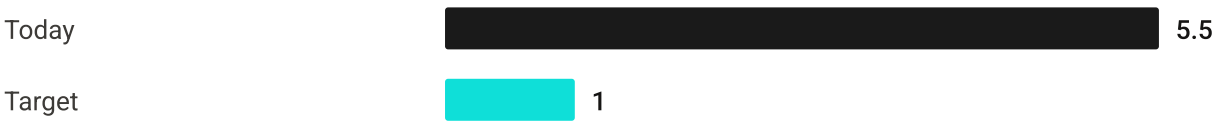
Measure	Value	Source
Share of calls that are status questions	**about 20%**	Measured on site
Status calls per month	**about 82**	Measured on site
Sampled status calls about a date that had moved	**3 of 10**	Measured on site

The math

Status calls per month (20% of 412)	about 82
Minutes per call	4
Hours per month on status calls	5.5
Counted in Section 6 labor total	yes

Time saved here is part of the Tab 6 labor figure, so it is not counted again.

Hours a month on status calls



14. The fix

Action	Effort	Cost	Owner	When
Automatic buyer texts: scheduled, crew on the way, complete	Medium	Part of rollout	Rock	Day 60
Send a written timeline at signing	Low	$0	Sales manager	Week 2
Text the buyer the same day a date moves	Low	Part of rollout	Office manager	Day 30

> ### Quick win
>
> Text every buyer waiting on a setup this week with their date, even if it hasn't changed.

What good looks like in 90 days

Buyers updated by text at every step, and status calls down to a handful a month.

15

Past Customers and Reviews

D

Score 2.00 of 5

186 families bought a home from you and none have heard from you since. That's the cheapest marketing you'll ever skip.

186

past buyers with no contact after delivery

How you ask for reviews, how you stay in touch with past buyers, and where referrals come from.

15. How I checked

What I reviewed

- Compared your Google reviews with the top 3 competitors nearby
- Checked whether buyers are asked for a review
- Pulled the list of past buyers from deal folders
- Traced last year's referral sales

Who I talked to

Owner, office manager, 3 salespeople

Time spent

1 hour on site, 2 hours remote

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Every buyer is asked for a review	Automatic ask after setup is complete	Never asked	●○○○○ 1
Review count keeps up with competitors	Similar count and rating	31 reviews at 4.2 vs top competitor at 146 and 4.7	●●○○○ 2
Past buyers hear from you	A few useful touches per year	None	●●○○○ 2
Referrals are asked for and rewarded	Simple referral ask and thank-you	Happens by luck	●●●○○ 3

Average of the four checkpoints: 2.00 of 5, grade D.

15. Findings

1. Competitors out-review you almost 5 to 1

You have 31 Google reviews at 4.2 stars. The top competitor nearby has 146 at 4.7. Buyers compare these before they ever call.

Evidence: Google review comparison

2. Nobody asks

Happy buyers are never asked for a review. The best moment, right after setup is finished, passes every time.

Evidence: Interviews

3. 186 families, zero contact

Past buyers get no maintenance tips, no anniversary note and no referral ask. They know friends and family who are shopping right now.

Evidence: Deal folders

15. The numbers

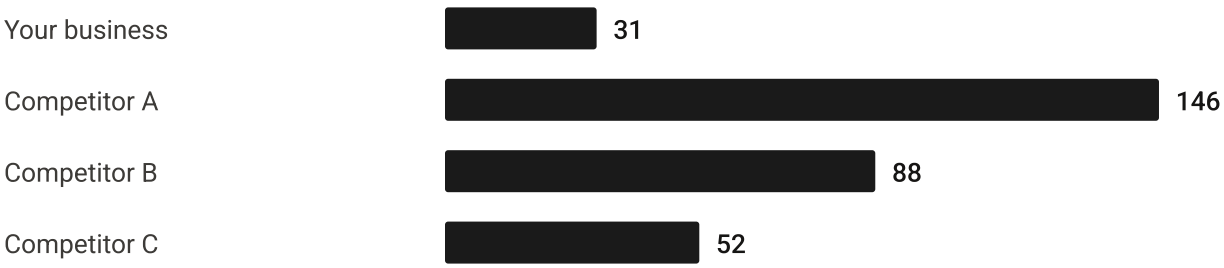
Measure	Value	Source
Google reviews	**31 at 4.2**	Measured on site
Top competitor	**146 at 4.7**	Measured on site
Past buyers in records	**186**	Measured on site
Referral sales last year	**3**	Measured on site
Revenue lift per 1-star rating gain, independent restaurants	**5% to 9%**	Industry benchmark

The math

Past buyers contacted each year	186
Extra referral sales from a simple program (assumed)	0.5 homes
Gross profit	$14,400
Less commission at 20%	-$2,880
Added to EBITDA	$11,520

The review benchmark comes from restaurants and is shown only as a direction, not a promise.

Google reviews



15. The fix

Action	Effort	Cost	Owner	When
Automatic review request when setup is marked complete	Low	Part of rollout	Rock	Day 30
Load the 186 past buyers into the CRM	Low	Part of rollout	Office manager	Day 30
4 touches a year: maintenance tips, anniversary, referral ask	Medium	Part of rollout	Rock	Day 60
Simple referral thank-you	Low	Small cost per referral	Owner	Day 60

> ### Quick win
>
> Text your last 20 buyers this week and ask for a Google review. Most will say yes.

What good looks like in 90 days

Every new buyer asked for a review, past buyers hearing from you four times a year, and a referral ask that's routine.

Part 4 of 4

Technology and Risk

The tools you pay for, how AI is used, and what keeps buyer data and your accounts safe.

Average score 1.90 of 5 across five focus areas

Tab	Focus area	Grade	Key number
16	Software Stack and Spend	C-	$7,320 yearly software spend that buys nothing
17	AI Use and Readiness	D	5 of 8 team members already using AI tools
18	Data Security	D-	0 accounts with two-step login turned on
19	Accounts and Backups	D	1 critical account owned by someone outside the business
20	Policy and Compliance	D	3 items flagged for your attorney

16

Software Stack and Spend

C-

Score 2.50 of 5

You pay for 17 tools and $27,960 a year. About a quarter of it buys nothing you use, and nobody could name all 17.

$7,320

yearly software spend that buys nothing

Every app and subscription the business pays for: who uses it, what it costs, which contracts auto-renew and what you could drop.

16. How I checked

What I reviewed

- Pulled 12 months of card and bank statements and tagged every recurring software charge
- Exported seat lists and last sign-in dates from each admin console we could access
- Pulled the plan level and renewal terms for each contract
- Flagged tools that do the same job

Who I talked to

Owner, office manager, all 3 salespeople

Time spent

5.5 hours on site, 5 hours remote

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Tools are actually used	Each tool shows weekly sign-ins	4 tools show zero sign-ins in 90 days	●●●○○ 3
No duplicate tools	One tool per job	2 scheduling tools and 2 texting apps	●●○○○ 2
Plans match real use	Plan level matches what the team uses	3 tools on top tiers using basic features	●●●○○ 3
Renewal dates are known	A calendar warns 30 days before each renewal	Nobody tracks renewals. Two annual plans renewed last year without review.	●●○○○ 2

Average of the four checkpoints: 2.50 of 5, grade C-.

16. Findings

1. Nobody can see the whole stack

The 17 tools are billed to three different cards, including one personal card. The office manager could name 9, the owner could name 12, and nobody could name all 17. When nobody can see the stack, nobody can cut it.

Evidence: Card statements, Jan to Dec, matched against interview lists

2. Four tools are dead weight

A second e-signature tool, an old website builder still billing after the site moved, a stock photo plan, and a project board from a 2023 trial all charge every month. Combined they cost $171 a month.

Evidence: Admin console exports and card statements

3. Two of everything

You pay for two scheduling tools and two texting apps. Salespeople picked their own over time, so both stayed. Picking one of each saves $1,656 a year and makes training simpler.

Evidence: Card statements, interviews

4. Annual contracts renew blind

Two annual plans renewed in March for $2,340 total. Nobody remembered agreeing to them. A renewal calendar would have caught both.

Evidence: Renewal receipts

16. The numbers

Measure	Value	Source
Paid tools found	**17**	Measured on site
Tools with zero logins in 90 days	**4**	Measured on site
Seats tied to former employees	**6**	Measured on site
Total yearly software spend	**$27,960**	Measured on site
SaaS spend per employee, Zylo 2025 index	**$4,830**	Industry benchmark
Duplicate tools	**2 pairs**	Measured on site

The math

Dead tools and orphan seats	$3,636
Remove duplicate tools	$1,656
Downgrade 3 plans	$1,980
Switch 2 kept tools to annual billing	$48
Total yearly savings	$7,320

Counted once in the Financial Impact summary as Software waste.

Yearly spend by category



16. The fix

Action	Effort	Cost	Owner	When
Build one software list with owner, cost, renewal date	Low	$0	Office manager	Week 1
Cancel the 4 dead tools	Low	$0	Owner	Week 1
Remove the 6 orphan seats	Low	$0	Office manager	Week 1
Pick one scheduling tool and one texting app	Low	$0	Owner + sales	Week 2
Downgrade the 3 over-tier plans	Low	$0	Office manager	Week 2
Put every renewal on a shared calendar with 30-day alerts	Low	$0	Office manager	Week 2

> ### Quick win
>
> Cancel the four dead tools this week. That is $2,052 a year back for about 30 minutes of work.

What good looks like in 90 days

One list on one card, every seat tied to a current employee, spend down to about $20,600 a year, and no renewal surprises.

17

AI Use and Readiness

D

Score 1.75 of 5

Five of your eight people already use AI, nobody approved it, and some of it involves buyer information. The best wins here are boring ones: replies, follow-up and paperwork.

5 of 8

team members already using AI tools

Which AI tools the team uses and what data goes into them, how comfortable they are with AI, and where it would actually pay off.

17. How I checked

What I reviewed

- Ran an anonymous 5-minute survey with written amnesty for past use
- Reviewed browser extensions and connected apps in Google and Microsoft accounts
- Ran a short hands-on prompt exercise in each interview
- Scored each idea on value, effort, data readiness and risk (0 to 3 each)

Who I talked to

Every team member (survey and interviews)

Time spent

2.5 hours on site, 2 hours remote; survey ran 3 days before

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Approved AI tools are named	A short list of approved tools	No list	●○○○○ 1
No customer data in free AI tools	Customer data only in approved, business accounts	Credit details pasted into a free chatbot at least once	●○○○○ 1
Team can write a useful prompt	Gets a usable result in 2 tries	3 of 8 did, the rest gave up	●●○○○ 2
AI ideas are tied to real work	Ideas map to timed workflows	Ideas were mostly 'make social posts'	●●●○○ 3

Average of the four checkpoints: 1.75 of 5, grade D.

17. Findings

1. AI is already here

5 of 8 people use AI tools: mostly free ChatGPT for listing descriptions, texts to buyers and email replies. That's good instinct. It just has no guardrails.

Evidence: Anonymous survey

2. Buyer data went into a free tool

One person pasted part of a credit application into a free chatbot to 'clean up the wording.' Free consumer accounts can keep what you type. This needs a rule, not blame.

Evidence: Survey with amnesty, follow-up interview

3. The wins are in replies and follow-up

The highest-scoring uses are an instant reply to new leads, follow-up messages written from the buyer's own inquiry, and a missing-documents reminder. All three save time and protect sales.

Evidence: Scored opportunity table on the next page

17. The numbers

Measure	Value	Source
Team members using AI	**5 of 8**	Measured on site
Using personal or free accounts	**5 of 5**	Measured on site
Customer data entered into free AI tools	**at least 1 time**	Measured on site
Team members who got a usable result in 2 tries	**3 of 8**	Measured on site
AI ideas worth doing now	**3 of 6**	Measured on site
US firms using AI, late 2025 to mid 2026	**about 17% to 20%**	Industry benchmark

The math

Instant lead reply (value 3, effort 1, data 2, risk 1)	**Do now**
Follow-up written from inquiry (3, 1, 2, 1)	**Do now**
Missing-document reminders (3, 1, 2, 1)	**Do now**
Listing descriptions in house style (1, 1, 2, 0)	**Do later**
Website chatbot (3, 2, 0, 1)	**Do later**
Outbound AI voice calls (2, 2, 1, 3)	**Don't do**

Value, effort, data readiness and risk scored 0 to 3. Value and data readiness count for the idea, effort and risk count against it. A total of 3 or more is do now.

What the team uses AI for



17. The fix

Action	Effort	Cost	Owner	When
Approve one business AI account for the team	Low	Small monthly cost	Owner	Week 2
One-page AI rule: what never goes into AI	Low	$0 (draft in Appendix E)	Owner	Week 1
Short team training on safe AI use	Low	Part of rollout	Rock	Day 30
Build the 3 do-now AI uses into the CRM rollout	Medium	Part of rollout	Rock	Day 60
Name the office manager as AI owner	Low	$0	Owner	Week 2

> ### Quick win
>
> Tell the team today: no credit or ID information in any AI tool, ever. Then approve one business account.

What good looks like in 90 days

One approved AI account, a written rule everyone has signed, and three AI uses running inside your systems, with a person approving anything AI writes before it reaches a buyer.

18

Data Security

D-

Score 1.50 of 5

Buyer Social Security numbers and pay stubs sit in shared logins, personal phones and an inbox with no second password step.

0

accounts with two-step login turned on

Who can get into what, how logins are shared, and where sensitive buyer data lives.

18. How I checked

What I reviewed

- Reviewed login settings in email, lender portals and file storage
- Asked how passwords are shared
- Checked where credit applications and ID copies are stored
- Reviewed accounts still active for people who left

Who I talked to

Owner, office manager, 3 salespeople

Time spent

2 hours on site, 1 hour remote

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Two-step login on email and portals	Turned on for every account	Off everywhere	●○○○○ 1
No shared logins	One login per person	Lender portals share one login across 4 people	●○○○○ 1
Sensitive documents stored safely	One secured folder with limited access	Inboxes, personal phones and an open shared drive	●●○○○ 2
Former employees removed	Access ended the day someone leaves	2 former salespeople still have email	●●○○○ 2

Average of the four checkpoints: 1.50 of 5, grade D-.

18. Findings

1. No second lock on any account

None of your email, file storage or lender portal accounts uses two-step login. One stolen password opens the whole office.

Evidence: Admin settings

2. One lender login, four people

Four people share one lender portal login. If something goes wrong, nobody can tell who did what.

Evidence: Interviews

3. Buyer IDs live everywhere

Copies of driver's licenses, pay stubs and Social Security numbers sit in email, on personal phones and in a shared drive anyone in the office can open. If you arrange financing, federal rules may require a written plan to protect this data. Section 20 flags it for your attorney.

Evidence: File review, interviews

18. The numbers

Measure	Value	Source
Accounts with two-step login	**0**	Measured on site
Shared logins	**3**	Measured on site
Former employees with access	**2**	Measured on site
Places sensitive buyer docs are stored	**4**	Measured on site

No savings figure is claimed. One breach or a locked email account would cost far more than this entire audit.

Security checkpoints passed



18. The fix

Action	Effort	Cost	Owner	When
Turn on two-step login everywhere	Low	$0	Office manager	Week 1
Individual lender portal logins	Low	$0	Office manager	Week 2
One secured folder for buyer documents, then clean out inboxes and phones	Medium	Part of rollout	Rock + office manager	Day 30
Close access for former employees, plus an exit checklist	Low	$0	Owner	Week 1

> ### Quick win
>
> Turn on two-step login for every email account today. It takes about 10 minutes per person.

What good looks like in 90 days

Two-step login everywhere, no shared logins, and every buyer document in one locked folder.

19

Accounts and Backups

D

Score 2.00 of 5

Your website domain is registered to a former web designer, and nobody has tested whether your files can be restored.

1

critical account owned by someone outside the business

Who owns your domain, website, ad and listing accounts, and whether your data is backed up.

19. How I checked

What I reviewed

- Looked up who owns the domain and website
- Checked admin owners on Google, Facebook, MHVillage and ad accounts
- Reviewed backup settings for email and files
- Asked what would happen if the office computer died tomorrow

Who I talked to

Owner, office manager

Time spent

1 hour on site, 1.5 hours remote

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
The business owns its domain	Domain in a company account the owner controls	Registered to a former designer's account	●○○○○ 1
Owner is admin on every platform	Owner plus one backup admin everywhere	Owner is admin on 3 of 6	●●○○○ 2
Data is backed up	Automatic backups that have been tested	Email backed up by provider only; files never tested	●●○○○ 2
Recovery plan exists	Written steps if a device or account is lost	None	●●●○○ 3

Average of the four checkpoints: 2.00 of 5, grade D.

19. Findings

1. Your domain isn't yours

The domain is registered under the account of the designer who built the old site. If that person stops renewing it or won't hand it over, your website and email go dark.

Evidence: Domain lookup

2. Admin rights are scattered

The owner is admin on Google, MHVillage and the website, but not on the Facebook page or the ad account. Those belong to the salesperson who set them up.

Evidence: Platform settings

3. Backups were never tested

Files on the office computer and shared drive have never been restored from backup. Nobody knows if it would work.

Evidence: Interviews

19. The numbers

Measure	Value	Source
Critical accounts owned by outsiders	**1 (domain)**	Measured on site
Platforms where owner is admin	**3 of 6**	Measured on site
Backup restore tests	**0**	Measured on site

No savings figure is claimed. This section is about not losing the business's own assets.

Accounts with the owner as admin



19. The fix

Action	Effort	Cost	Owner	When
Transfer the domain into a company account	Low	Small yearly fee	Owner	Week 2
Make the owner admin on every platform, with one backup admin	Low	$0	Owner	Week 2
Turn on automatic file backup and test one restore	Low	Small monthly cost	Office manager	Day 30
One-page recovery plan	Low	$0	Rock	Day 30

> ### Quick win
>
> Call the former designer this week and start the domain transfer.

What good looks like in 90 days

The business owns every account, backups are tested, and a one-page recovery plan is in the report.

20

Policy and Compliance

D

Score 1.75 of 5

We found three areas your attorney should look at. None are emergencies today, and all are cheaper to fix now than later.

3

items flagged for your attorney

Rules that touch your tech: texting and calling consent, protecting buyer financial data, and AI use. Flagged for counsel, not legal advice.

20. How I checked

What I reviewed

- Reviewed how phone numbers are collected and whether consent to text is recorded
- Reviewed how buyer financial data is handled when you help arrange financing
- Checked for any written AI or data policy
- Listed each item as a question for your attorney

Who I talked to

Owner, office manager

Time spent

1 hour on site, 2 hours remote

Scored checkpoints

Checkpoint	What good looks like	What I found	Score
Consent to text is recorded	Clear consent captured on every form	No consent language on web or paper forms	●○○○○ 1
Written plan to protect buyer financial data	A written security program if the rules apply	None	●●○○○ 2
Written AI policy	One page, signed by the team	None	●●○○○ 2
Sales staff stay inside licensing lines	Sales don't give loan advice	Generally fine; one script needs a review	●●○○○ 2

Average of the four checkpoints: 1.75 of 5, grade D.

20. Findings

1. Texting without recorded consent

Your forms collect phone numbers but don't ask permission to text. Federal law (the TCPA) allows $500 to $1,500 in damages per unwanted marketing text or automated call. Adding consent language is cheap insurance before any automation goes live.

Evidence: Forms review; 47 U.S.C. 227

2. Buyer financial data may need a written program

Dealers that help arrange financing may fall under the FTC Safeguards Rule, which calls for a written plan to protect customer financial data. Your attorney should confirm whether it applies to you.

Evidence: FTC Safeguards Rule, 16 CFR Part 314; flagged for counsel

3. No AI rule yet

Section 17 found buyer data in a free AI tool. A one-page AI policy fixes most of that risk. A draft is included in the appendix.

Evidence: Section 17

20. The numbers

Measure	Value	Source
Forms with text consent language	**0 of 3**	Measured on site
Written data security program	**No**	Measured on site
Written AI policy	**No**	Measured on site
TCPA damages per violation	**$500 to $1,500**	Industry benchmark

No savings figure is claimed. This section is risk you avoid. Everything here is a question for your attorney, not legal advice.

Compliance items



20. The fix

Action	Effort	Cost	Owner	When
Add text consent language to every form before automation goes live	Low	$0	Rock + attorney	Week 1
Ask your attorney whether the Safeguards Rule applies	Low	Attorney time	Owner	Week 2
Adopt the one-page AI policy	Low	$0	Owner	Week 2
Review the one sales script that touches financing	Low	Attorney time	Owner	Day 30

> ### Quick win
>
> Add consent-to-text wording to the website form. The automation in Section 4 depends on it.

What good looks like in 90 days

Consent recorded on every form, a clear answer from your attorney on the Safeguards Rule, and a signed AI policy.

30, 60, 90-day roadmap

Ranked by impact and effort. Revenue leaks and security first, then the systems that make everything else easier.

First 30 days

- Instant reply and missed-call text back live on every source (Tab 4, 11)
- Two-step login everywhere, old accounts closed (Tab 18)
- Dead tools cancelled, orphan seats removed, Zillow paused (Tab 16, 1)
- Consent-to-text language on every form (Tab 20)
- One CRM chosen and every open buyer loaded (Tab 12)
- Document checklists written for each loan type (Tab 7)
- Monday huddle started (Tab 10)
- Domain transfer started (Tab 19)

Days 31 to 60

- Lead sources connected to the CRM, source required (Tab 1, 12)
- 30-day follow-up sequence and stale-buyer re-engagement (Tab 5)
- Deal tracker with missing-document reminders (Tab 7)
- Automatic Monday report with the 8 core numbers (Tab 9)
- Shared setup and service schedule with buyer texts (Tab 13, 14)
- Approved AI account, signed AI policy, team session (Tab 17)
- Secured folder for buyer documents (Tab 18)

Days 61 to 90

- Buyer information typed once across forms and paperwork (Tab 6)
- Aging report and aged-home playbook in use (Tab 8)
- Review requests and past-buyer program running (Tab 15)
- Website: inventory one tap away, text and booking buttons (Tab 2)
- Backups tested, recovery plan written (Tab 19)
- 90-day check-in against the Appendix D baselines

Every item has an owner and a date in its tab. The 30 and 90-day check-ins re-run the same timings and tests used in this audit.

Don't-do list

What I'd skip, even though someone will try to sell it to you.

Don't buy a big dealer management system yet

Your problem today is setup, not missing software. Put the CRM and workflows in place first, then see if anything is still missing.

Don't add more lead sources

You already lose leads you have. More leads into a slow response just means more lost buyers.

Don't use AI voice for outbound calls to buyers

Calling and texting rules make this risky for now, and buyers in this market want a real person.

Don't put credit or ID details into any AI tool

Not even the approved one, until your attorney and your AI policy say how.

Don't rebuild the website from scratch

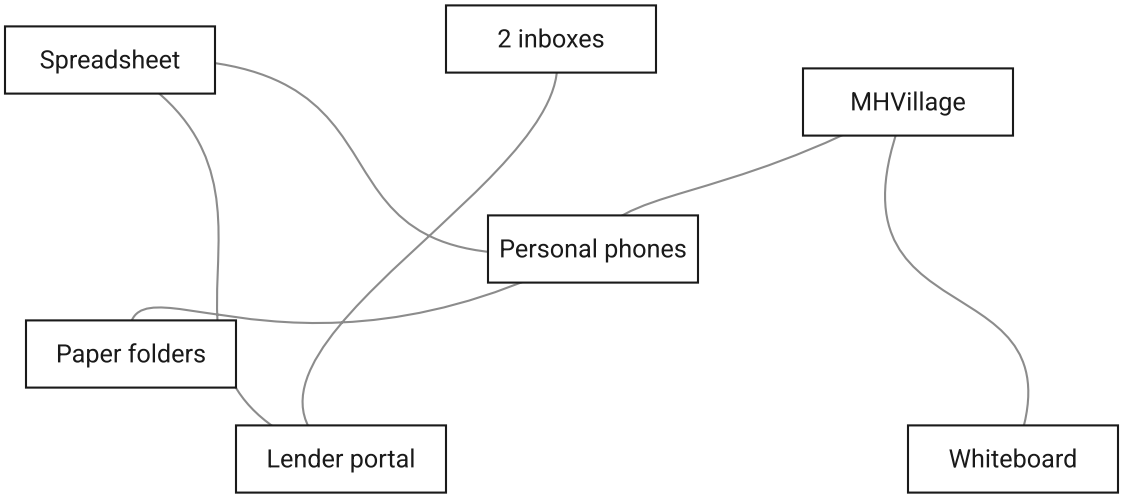
Three small changes fix most of what's wrong. A new site would cost more and take months.

Don't automate texts before consent is recorded

Add the consent wording first. The automation is ready the moment it is.

Your tools today

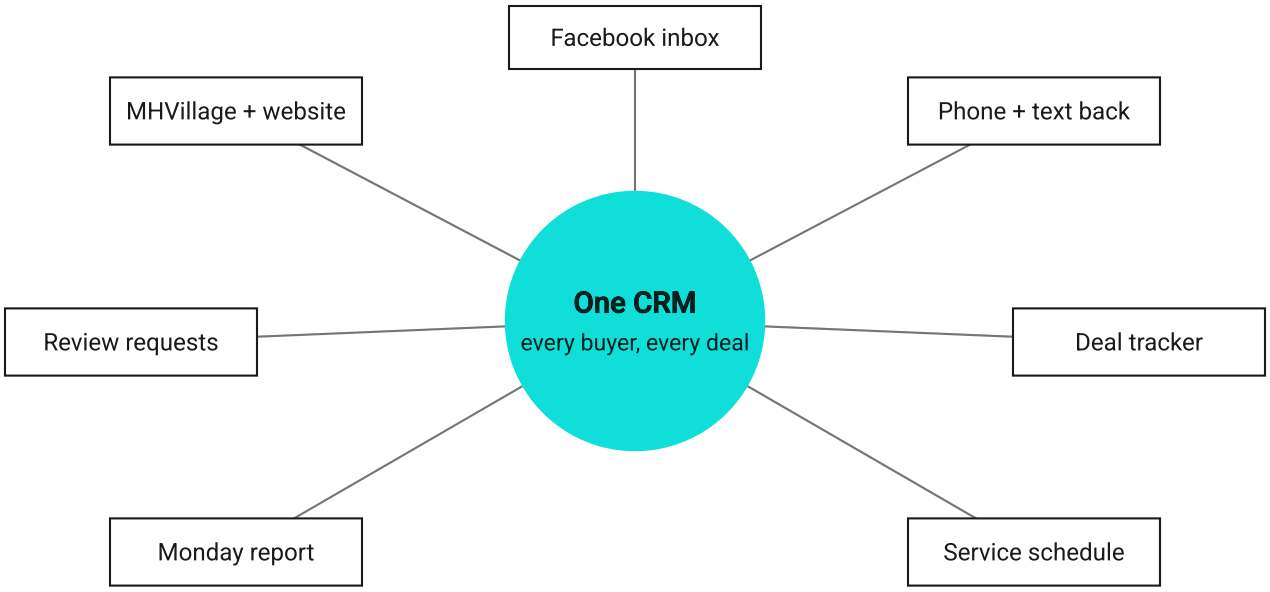
Seven places a buyer's information can live, and none of them talk to each other.



Every arrow is a person retyping or forwarding something by hand.

Your tools after the rollout

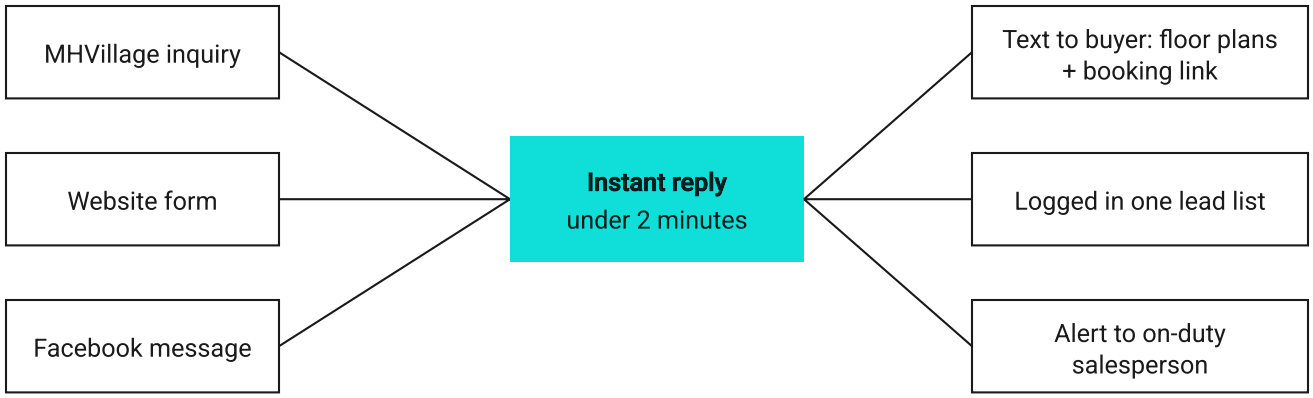
One CRM in the middle. Everything else feeds it or reads from it.



Buyer information is typed once. Replies, reminders, review requests and the Monday report run on their own.

The live automation

Built during the audit, on your own lead sources, and shown running at the readout.



What it does

- Catches every new inquiry from MHVillage, the website and Facebook
- Texts the buyer within 2 minutes, day or night, with matching floor plans and a link to book a visit
- Logs the buyer and the source in one list
- Alerts the salesperson on duty, and the manager if nobody responds in 15 minutes

Test results

Test inquiries sent	12 Measured on site
Replied automatically	12 of 12 Measured on site
Average time to reply	38 seconds Measured on site
Booked a visit from the link	tested, works Measured on site

The live automation: sample messages

Hi, is the 3 bed 2 bath Clayton on your lot still available? What would payments look like?

Hi Tasha, thanks for asking about the 3 bed, 2 bath. It's still here. I've attached the floor plan and two similar homes. Payments depend on the loan type, and we can walk you through options at a visit. Pick a time that works: [booking link]. Marcus from Pinecrest will also call you first thing tomorrow.

Reply STOP to opt out.

Before it goes live on every source

- Consent-to-text wording added to every form (Tab 20)
- Message wording approved by you
- On-duty schedule set so alerts go to the right person

Who owns it

The office manager, with Rock supporting through the rollout. Changes to the message wording take about five minutes.

Setup options

The roadmap is yours either way. If you want help building it, here's how that works.

First system

One focused build from the roadmap, usually speed to lead plus the CRM. About 4 weeks.

Department rollout

The full 90-day roadmap for sales and the office: CRM, follow-up, deal tracking, reporting and the AI uses in Tab 17. Recommended.

Ongoing care

Monthly support after launch. I watch the systems, fix what breaks, and add the next win.

Terms

- 100% of the audit fee is credited toward a Department Rollout signed within 60 days of the readout.
- Delivery guarantee: everything in scope gets built, tested and handed over working.
- No revenue guarantees. The money figures in this report depend on how the systems get used.
- Pricing is scoped from this report and shared at the readout.

Appendix A: Software inventory

Tool	Category	Monthly	Yearly	Last used	Recommendation
Microsoft 365 (10 seats)	Office	$220	$2,640	Daily	2 seats belong to former staff
Cloud phone system, premium	Phones	$360	$4,320	Daily	Downgrade to standard
Texting app A	Phones	$100	$1,200	Daily	Duplicate of texting app B
Texting app B	Phones	$79	$948	Daily	Keep
Scheduling tool A	Sales	$38	$456	Weekly	Duplicate of scheduling tool B
Scheduling tool B	Sales	$16	$192	Weekly	Keep
E-signature A (8 seats)	Sales	$176	$2,112	Weekly	Keep; 4 seats unused
E-signature B	Sales	$69	$828	None in 90 days	Cancel
Email marketing with contacts, premium	Marketing	$299	$3,588	Monthly	Downgrade; use built-in CRM
Website builder, premium	Marketing	$89	$1,068	Monthly	Downgrade
Old website builder	Marketing	$49	$588	None in 90 days	Cancel
Accounting	Office	$90	$1,080	Daily	Keep
Payroll	Office	$140	$1,680	Biweekly	Keep
Credit report service	Sales	$269	$3,228	Weekly	Keep
Stock photos	Marketing	$29	$348	None in 90 days	Cancel
Project board (2023 trial)	Office	$24	$288	None in 90 days	Cancel
IT support and antivirus	Office	$283	$3,396	Ongoing	Keep
Total, 17 tools		**$2,330**	**$27,960**		

Source: 12 months of card statements and admin exports Measured on site.

Appendix B: Test lead and call log

Test inquiries

#	Channel	Sent	First human reply
1	MHVillage	Tue 10:14 am	2 hrs
2	MHVillage	Wed 7:52 pm	19 hrs
3	Website form	Thu 1:30 pm	4 hrs
4	Facebook	Thu 8:15 pm	26 hrs
5	MHVillage	Fri 11:40 am	9 hrs
6	Facebook	Sat 6:05 pm	No reply
7	Website form	Sun 3:20 pm	No reply
8	Facebook	Sun 7:45 pm	No reply

Test calls to the main line

#	Called	What happened
1	Mon 9:20 am	Answered by receptionist
2	Tue 12:10 pm	Rang 4 times, voicemail, message left
3	Wed 5:45 pm	Voicemail full
4	Thu 10:05 am	Answered by salesperson
5	Sat 4:30 pm	Answered after transfer, 2 minutes on hold
6	Sun 1:15 pm	Voicemail full

All tests ran over 6 days. The team didn't know which inquiries were tests Measured on site.

Appendix C: Interview themes

Reported as themes only. No quote is tied to a person.

Everyone wants fewer places to look

Every person, in their own words, said some version of 'I never know where the latest info is.'

The office manager is the bottleneck, and knows it

Nearly every process runs through one person, who said she'd love to stop being the only one who knows things.

Sales want help with follow-up, not more leads

Salespeople said they lose track of buyers after the first week.

People already use AI and were nervous to say so

With amnesty in writing, five people shared how they use it. Most uses were smart. One was risky.

Service feels left out of the loop

Setup techs learn about schedule changes by text, sometimes the night before.

Nobody objects to change

Not one person asked to keep things the way they are.

Appendix D: Timed workflow baselines

These are the "before" numbers. The 30 and 90-day check-ins re-time the same tasks.

Workflow	Who	How often	Hours a week	Systems touched
Log a new lead and look up buyer history	Sales (3)	4.5 min x 70 + 7.7 min x 25 a week	**8.5**	Spreadsheet, 2 inboxes, phones
Build a loan package and retype deal info	Office manager	3.2 hrs per package; retyping into 6 places	**9.0**	Spreadsheet, credit app, lender portal, factory order, title forms
Schedule setups and service, answer status calls	Service + receptionist	about 30 jobs and 82 status calls a month	**4.0**	Whiteboard, texts, paper
Build the Monday report	Owner	once a week	**3.0**	Spreadsheet, bank, floor plan statement, MHVillage
Send follow-up to open buyers	Sales (3)	average 1.6 touches per buyer	**counted in sales**	Personal phones
Total manual hours per week			24.5	

Timed from screen shares of real, recent tasks during the on-site days Measured on site.

Appendix E: Draft AI policy

One page, plain rules, signed by everyone. Have your attorney review it before you adopt it.

1. **Use only the approved business AI account.** No personal or free AI accounts for work.
2. **Never put these into any AI tool:** Social Security numbers, driver's license or ID numbers, bank or pay information, credit reports or credit applications.
3. **Good uses:** listing descriptions, first drafts of texts and emails, summarizing your own notes, brainstorming.
4. **A person reviews everything AI writes** before it goes to a buyer, a lender or the public. Fixed message templates you have approved, like the instant reply, can send on their own.
5. **No AI phone calls or AI-written loan advice** to buyers.
6. **Ask the AI owner** (office manager) before trying a new AI tool.
7. **Report mistakes right away.** No blame for reporting.

Signed: _____ Date: _____

Appendix F: Sources

1. Manufactured Housing Institute, US Fact Sheet 2025 (Census Manufactured Housing Survey data): average new home price $123,300 in 2024
2. Consumer Financial Protection Bureau, 2021: about 42% of manufactured home purchase loans are chattel; under 30% of applications approved
3. Pew Charitable Trusts, 2022: 54% of completed manufactured home purchase applications denied (2021 data)
4. Harvard Business Review, 'The Short Life of Online Sales Leads,' 2011: responding within an hour about 7x more likely to qualify a lead
5. MIT / InsideSales lead response study: 5 minutes vs 30 minutes, about 100x odds of contact
6. US Bureau of Labor Statistics, Employer Costs for Employee Compensation: total compensation about 1.36x to 1.43x wages
7. Zylo SaaS Management Index 2025: about $4,830 SaaS spend per employee
8. CallRail data (secondary summary): about 42% of missed callers leave a voicemail, about 21% call a competitor
9. Google Business Profile Help, 'Tips to improve your local ranking on Google': local results are based on relevance, distance and prominence
10. Harvard Business School (Luca), Yelp study: one-star increase linked to 5% to 9% revenue for independent restaurants
11. US Census Business Trends and Outlook Survey, 2025 to 2026: about 17% to 20% of firms use AI
12. BizBuySell and business broker data, 2025: about 2.6x seller's earnings; about 4x EBITDA for $2M to $5M businesses
13. Telephone Consumer Protection Act, 47 U.S.C. 227: $500 to $1,500 per violation
14. FTC Safeguards Rule, 16 CFR Part 314 (applicability to be confirmed by counsel)
15. HUD Manufactured Home Dispute Resolution Program, 24 CFR Part 3288

Full links are in the digital version.

Appendix G: Glossary

Chattel loan	A loan on the home only, not the land. Common for manufactured homes.
CRM	Customer relationship manager. One place for every buyer and every conversation.
EBITDA	Earnings before interest, taxes, depreciation and amortization.
Floor plan	Financing that pays for the homes on your lot until they sell.
Loaded labor rate	An employee's wage plus taxes, benefits and other costs of employing them.
Seller's earnings (SDE)	Profit plus the owner's pay, used to value small businesses.
Shadow AI	AI tools used for work without the business approving them.
Speed to lead	How long it takes to respond to a new inquiry.
Two-step login	A second check, like a code on your phone, after the password.

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Sample report. Company and figures are illustrative.