SOLTECA

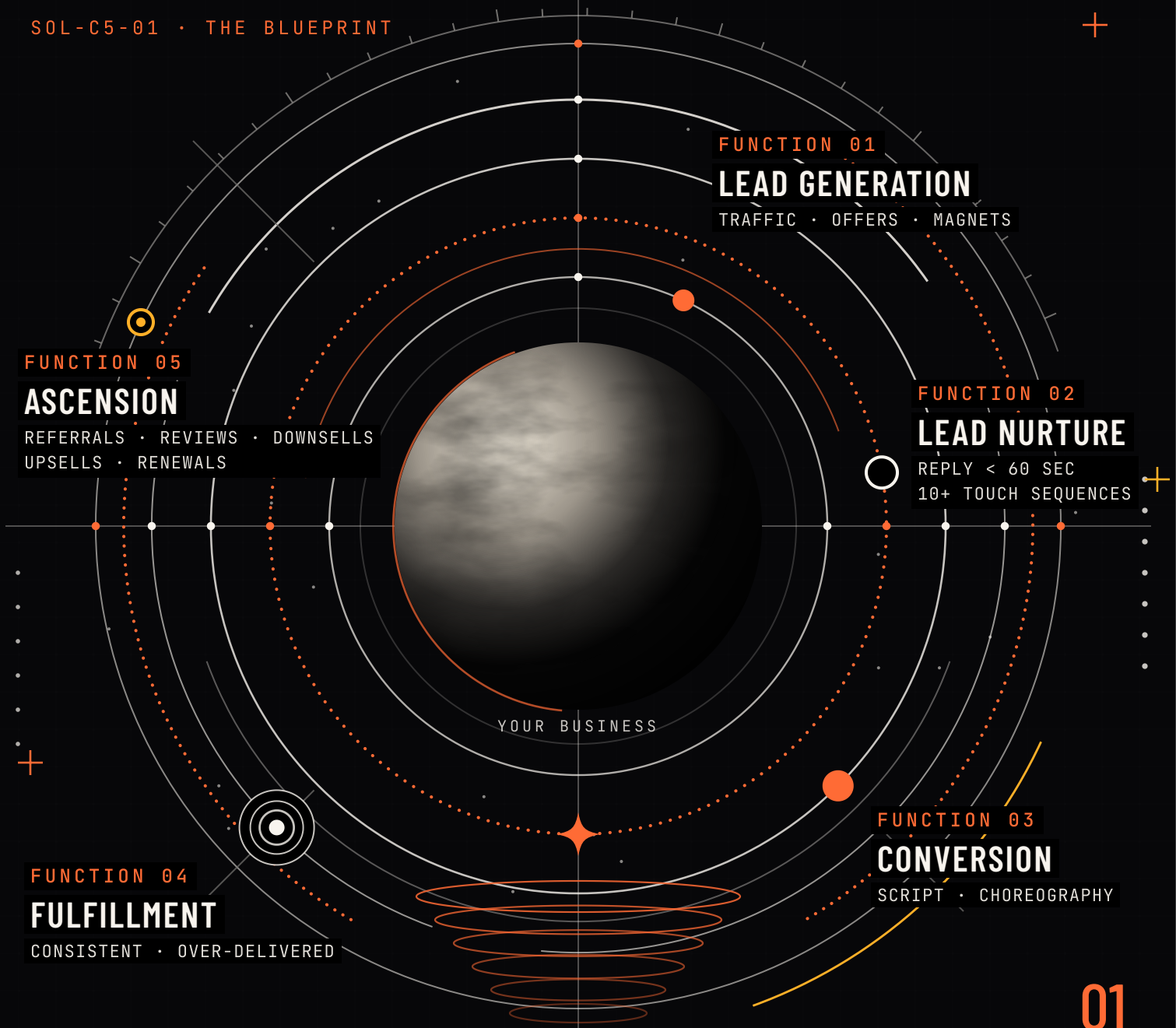
C5_GROWTH_ENGINE

5 CORE FUNCTIONS. ONE OWNED ENGINE.

POWERING GROWTH PAST $10M A YEAR.
THE BLUEPRINT FOR EVERY FUNCTION, P1 TO P5.

COORDINATES
26° 42' 20" N
80° 02' 11" W

SOL-C5-01 · THE BLUEPRINT



FUNCTION 01
LEAD GENERATION
TRAFFIC · OFFERS · MAGNETS

FUNCTION 02
LEAD NURTURE
REPLY < 60 SEC
10+ TOUCH SEQUENCES

FUNCTION 03
CONVERSION
SCRIPT · CHOREOGRAPHY

FUNCTION 04
FULFILLMENT
CONSISTENT · OVER-DELIVERED

FUNCTION 05
ASCENSION
REFERRALS · REVIEWS · DOWNSELLS
UPSELLS · RENEWALS

8 YEARS · 32 BUSINESSES
25 INDUSTRIES · 3 CONTINENTS

01
02
PART ONE
OF TWO

[00 / CONTENTS]

THE BLUEPRINT FOR ALL FIVE

Part One is the map of the C5_GROWTH_ENGINE. It shows how every core function runs at each phase of automation, what the enterprise version looks like, the build that moves you up each step, and how we bridge the gap with you. Part Two is the scale that tells you where you stand.

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PART ONE · THIS DOCUMENT

The C5_GROWTH_ENGINE Blueprint

The five functions, the five phases, and the before and after of every function from P1 to P5.

PART TWO · SOL-C5-02

The Scale

A 10-minute weigh-in that gives you your phase and the one constraint to fix first.

[00 / THE THESIS]

EVERY BUSINESS IS A PIPELINE

Every business runs on five core functions, in the same order. People go from A to Z through the same steps every time: they find you, they warm up to you, they buy, they get served, and they come back for more. Think of your business in these five terms and the revenue left on the table becomes easy to see.

F1	LEAD GENERATION	Get the right strangers to raise their hand.	→
F2	LEAD NURTURE	Work every lead until they are ready to talk.	→
F3	CONVERSION	Turn conversations into a yes.	→
F4	FULFILLMENT	Deliver more than they paid for, every time.	→
F5	ASCENSION	Referrals, reviews, upsells, downsells, and renewals.	↺

1 IN 250

Roughly 1 in 250 businesses ever crosses $10M a year.

SOURCE: VERNE HARNISH, SCALING UP

The ones that cross build a system for each function and automate everything that can run on its own. The ones that stall run all five on people, memory, and the founder's hours.

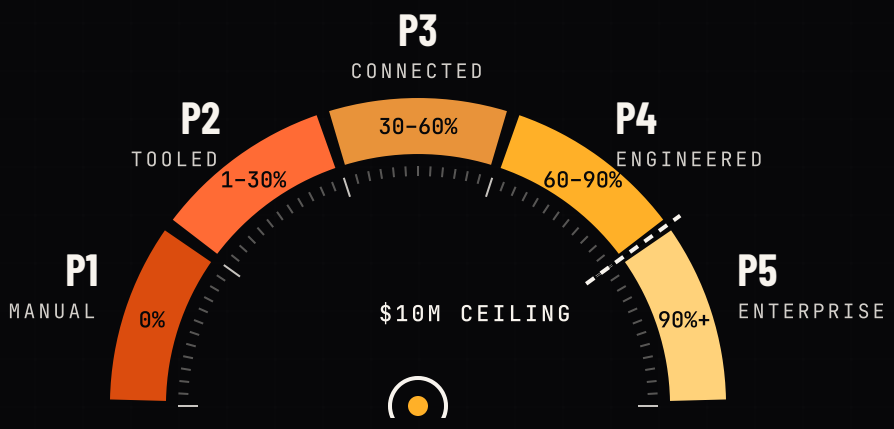
[IN PLAIN TERMS]

Five functions. Build a system for each one, automate it, and the ceiling moves.

[00 / THE 5 PHASES]

THE 5 PHASES OF AUTOMATION

Each function can sit at a different phase. Sales might run at P3 while fulfillment runs at P1.



P1	MANUAL	0%	Every task moves because a person moved it. The founder is the system.
P2	TOOLED	1–30%	Rented tools exist. People copy data between them and remember the follow-ups.
P3	CONNECTED	30–60%	Some workflows fire on their own. Exceptions and decisions still route to the founder.
P4	ENGINEERED	60–90%	One owned record across the function. Defined, repeatable tasks run on their own.
THE ENTERPRISE GAP · $10M CEILING			
P5	ENTERPRISE	90%+	An owned operating system. Proprietary software, apps, and AI agents run the work.

[IN PLAIN TERMS]

Phases 1 to 4 can be climbed with discipline and this blueprint. Phase 5 is an engineering project, and that gap is where most businesses stop.

[00 / ENTERPRISE, DEFINED]

WHAT ENTERPRISE MEANS

[DEFINITION · ENTERPRISE-LEVEL AUTOMATED SYSTEM]

A proprietary operating system the company owns outright: its own software, apps, data, and AI agents running 90% or more of the work, with the IP on the balance sheet instead of rented from vendors.

Phases 1 to 4 run on rented tools wired together. Phase 5 replaces them with infrastructure you own. Every function reaches it the same way, through the six layers of an owned stack.

01	**CAPTURE**	Owned forms, pages, apps, and calculators catch every lead, call, payment, and reply.
02	**DATA SPINE**	One proprietary database of every person, deal, and dollar. Every function reads and writes to it.
03	**LOGIC**	Your rules, stages, and response times coded into software you control.
04	**AI AGENTS**	Agents you own answer, follow up, book, and route inside set boundaries, 24/7.
05	**APPS**	Branded apps and portals for your team and your customers, built for how you work.
06	**OWNED IP**	Code, data, and IP belong to the company. No vendor can raise the price or switch it off.

> **NEVER AUTOMATE A ROLE. DECOMPOSE IT, THEN BUILD THE TASKS THAT QUALIFY.**

[00 / HOW TO USE THIS]

HOW TO USE THIS BLUEPRINT

Each function gets five sheets. Read them in order. Together they show where the function is today, where it needs to go, how to build each step, and how we build it with you.

SHEET A
THE FUNCTION
What it is, its parts, the numbers that matter, and where the money leaks.

SHEET B
AT PHASE 5
The enterprise system: the flow, what runs on its own, and the standard.

SHEET C
P1 TO P5
Every phase side by side and the next build to move up.

SHEET D
THE BUILD
The blueprint for each build, P1 to P5, with a done-when test.

SHEET E
THE BRIDGE
How we build it with you: six gates and the owned stack.

[THE SEQUENCE]

01 **READ ALL FIVE FUNCTIONS ONCE.**
Mark the phase you think each one runs at today.

02 **TAKE PART TWO, THE SCALE.**
The weigh-in turns your guesses into a number and names the constraint.

03 **GO TO THAT FUNCTION'S SHEETS C AND D.**
Sheet C names the next build for your phase. Sheet D shows how to build it and when it is done.

04 **BUILD ONE PHASE AT A TIME.**
Skipping phases is how teams pay for automation that produces a faster wrong answer.

05 **STOP AT THE ENTERPRISE GAP AND DECIDE.**
P4 to P5 is an engineering project. Sheet 33 shows why. Each Sheet E and sheet 34 show how we build it with you.

[F1 / SHEET A · THE FUNCTION]

F1 LEAD GENERATION

GET THE RIGHT STRANGERS TO RAISE THEIR HAND.

THE QUESTION	Where will next month's leads come from, and what does each one cost?

Lead generation is every action that turns a stranger into someone who has shared a name, email, or phone and asked to hear more. It covers where your traffic comes from, the offers and lead magnets that make people raise their hand, and the forms and routing that catch them the moment they do.

F1.1 CHANNELS

The Core Four: warm outreach, content, cold outreach, and paid ads. One-to-one and one-to-many.

F1.2 OFFERS AND MAGNETS

The reason a stranger raises their hand. A free, narrow solution that creates the next problem you solve.

F1.3 CAPTURE SURFACES

Forms, pages, calls, chat, and DMs. Every door a lead can walk through.

F1.4 SOURCE TRACKING

Every lead tagged with the channel, campaign, and cost that produced it.

F1.5 ROUTING

Every lead lands in one record and reaches the right owner within seconds.

F1.6 LEAD GETTERS

Referrers, affiliates, partners, and employees who bring leads to you.

[THE NUMBERS THAT MATTER]

+ Leads per month, by channel
+ Cost per lead, by channel
+ Opt-in rate on each lead magnet (aim for 20%+)
+ Share of leads with source tracked

[WHERE THE MONEY LEAKS]

! Leads land in five inboxes and some are never seen.
! Nobody can say which channel pays for itself.
! The founder's network is the only reliable channel.

[F1 / SHEET B · LEAD GENERATION AT PHASE 5]

THE DEMAND ENGINE

[WHAT ENTERPRISE LOOKS LIKE HERE]

An owned demand engine. Your own lead magnet apps, landing pages, capture forms, and attribution software feed one proprietary data spine, with no rented tool in the path.

[THE FLOW]

01 **CHANNELS** — Core Four running → 02 **CAPTURE** — Every form, call, DM → 03 **SPINE** — Source and cost attached → 04 **ROUTE** — Right owner in seconds → 05 **OWNED STACK** — Code and data you own

[RUNS ON ITS OWN · 90%+]

+ Lead magnets deliver themselves the moment someone opts in.
+ Every form, call, chat, and ad lead lands in the CRM automatically.
+ Source, campaign, and cost attach to every lead with no typing.
+ Duplicates merge and each lead is scored on fit.
+ Leads route to the right owner in seconds, day or night.
+ Lead magnets run as your own apps, quizzes, and calculators.
+ One piece of content is cut into many posts on a schedule.
+ Referral and partner leads arrive tagged to the person who sent them.

[PEOPLE STILL OWN]

- Choosing the offers and the angles
- Writing the message and the creative
- Relationships with partners and referrers

[THE PHASE 5 STANDARD]

✓ Every capture surface runs on software you own
✓ 100% of lead data lives on your own spine
✓ No rented point tool in the lead path

[F1 / SHEET C · LEAD GENERATION · P1 TO P5]

FROM MANUAL TO ENTERPRISE

[BEFORE · P1 MANUAL]

Next month depends on who the founder happened to talk to this month.

[AFTER · P5 ENTERPRISE]

Every lead enters through software you own and lands on a data spine you own.

PHASE	HOW IT RUNS	OWNER'S ROLE	THE BUILD TO MOVE UP
P1	Referrals and the founder's network. No tracking at all.	The only channel	List every lead source and put every lead in one place.
P2	Ads or an agency. Forms go to email. A spreadsheet if you are lucky.	Approves spend and guesses	Route every source into one CRM with a source tag.
P3	Every source lands in one CRM. Most leads are tagged.	Reads reports, picks campaigns	Attach cost to every lead and own your lead magnets.
P4	Source and cost on every lead. Owned magnets. Routing in seconds.	Sets strategy and offers	Build attribution and a forecast model per channel.
THE ENTERPRISE GAP			
P5	Proprietary lead-gen software and apps you own. Every channel feeds your own spine.	Owns the IP	Add new channels as modules on your own stack.

THE LAST MILE

P4 → P5

Attribution across every channel, cost data piped in from each ad platform, deduplication, fit scoring, and a forecasting model. That is integration engineering, and it keeps changing as the platforms change.

[F1 / SHEET D · LEAD GENERATION · THE BUILD]

BUILD THE DEMAND ENGINE

Four builds take lead generation from the founder's network to an owned demand engine. Run them in order. Each one creates the data the next build needs.

THE BUILD	WHAT YOU INSTALL	THE EXIT TEST
BUILD 01 **P1 → P2** ONE PLACE FOR EVERY LEAD	+ List every source a lead has come from in the last 12 months. + Pick one CRM and point every form, inbox, and phone line at it. + Make source a required field on every new record. + Write one lead magnet for your best customer type.	DONE WHEN **Every new lead lands in one place, with a source, the same day.**
BUILD 02 **P2 → P3** ROUTED AND TAGGED	+ Connect web forms, ad forms, chat, and call tracking to the CRM. + Capture channel and campaign on every lead automatically. + Route each lead to its owner in seconds, day or night. + Merge duplicates on email and phone.	DONE WHEN **No lead is typed in by hand, and nobody has to ask where it came from.**
BUILD 03 **P3 → P4** COST ON EVERY LEAD	+ Pull spend from each ad platform and attach cost per lead. + Move lead magnets onto pages and tools you own. + Score every lead on fit against your best customer. + Give referrers and partners tracked links as lead getters.	DONE WHEN **You can name cost per lead and return for every channel.**

THE ENTERPRISE GAP · THE LAST BUILD

BUILD 04 **P4 → P5** THE OWNED DEMAND STACK	+ Replace rented capture tools with your own magnet apps. + Build attribution across every channel on your own spine. + Add a forecast model: next month's leads at a given spend. + Plug new channels in as modules on the same stack.	DONE WHEN **Every lead enters through software you own, and next month is a forecast.**

THE BUILD RULE — Track every lead before you pay for more of them.

[F1 / SHEET E · LEAD GENERATION · THE BRIDGE]

THE BRIDGE

HOW WE BUILD YOUR DEMAND ENGINE WITH YOU.

The bridge is how SOLTECA carries lead generation from the phase you score today to Phase 5. We run the Machine Method on it, gate by gate, while your team keeps running the business.

#	GATE	WHAT WE DO ON F1	EXIT ARTIFACT
01	DESIGN	Map every source, form, inbox, and hand-off with the people who handle leads. Specify fields, tags, routing, and scoring.	Lead architecture document
02	BUILD	The spine first, then capture surfaces, source and cost tracking, routing, and fit scoring.	Working demand engine
03	TEST	Push test leads through every channel and form, including duplicates, bad data, and broken links.	Test log, every path
04	LAUNCH	Switch every door to the new system with a way back, then train each owner on their leads.	Live lead flow
05	OPTIMIZE	Read cost per lead and opt-in rate by channel. Cut what does not pay and rebuild weak magnets.	Channel performance read
06	SCALE	Add owned magnet apps, new channels, and the forecast model. Name the next constraint.	Next roadmap

[THE OWNED STACK WE INSTALL]

01 CAPTURE
Owned landing pages, magnet apps, quizzes, and calculators.

02 DATA SPINE
Every lead, source, and cost on one record you own.

03 LOGIC
Routing, deduplication, and fit scoring coded to your rules.

04 AI AGENTS
Agents that enrich, score, and route new leads in seconds.

05 APPS
A lead-getter portal for referrers and partners, with tracked links.

06 OWNED IP
Code, data, and magnets transferred to your company.

[YOUR TEAM'S PART]

- Name the offers and angles that win today
- Give access to ad accounts, forms, and the CRM
- Approve the architecture in writing

[WHAT YOU OWN AT THE END]

- ✓ Every capture surface, on software you own
- ✓ 100% of lead data on your own spine
- ✓ The attribution and forecast model

[F2 / SHEET A · THE FUNCTION]

F2 LEAD NURTURE

WORK EVERY LEAD UNTIL THEY ARE READY TO TALK.

THE QUESTION	How fast does every lead hear from you, and how many times?

Nurture is the work between a raised hand and a booked conversation. It decides how fast a lead hears from you, how many times you reach out, and what they see each time. Most leads are not ready the day they raise their hand. Nurture keeps you present, useful, and trusted until they are.

F2.1 SPEED TO LEAD

A reply in under 5 minutes, every lead, no matter the hour.

F2.2 TOUCH CADENCE

Calls, texts, emails, and DMs on a set schedule until a yes or a clear no.

F2.3 VALUE BY AWARENESS

Content matched to where the lead is: unaware, problem aware, solution aware, product aware, most aware.

F2.4 PROOF LIBRARY

Case studies, testimonials, and reviews sent at the moment they answer a doubt.

F2.5 BOOKING

Calendar, confirmations, and reminders that get people to show up.

F2.6 REACTIVATION

Old leads woken up on a schedule instead of left to die.

[THE NUMBERS THAT MATTER]

+ Time to first reply
+ Touches per lead before a yes or a no
+ Lead to booked-call rate
+ Show rate on booked calls

[WHERE THE MONEY LEAKS]

! Replies take hours, so the lead buys from whoever called first.
! Follow-up stops after one or two tries.
! Old leads are never contacted again.

[F2 / SHEET B · LEAD NURTURE AT PHASE 5]

THE NURTURE ENGINE

[WHAT ENTERPRISE LOOKS LIKE HERE]

An owned nurture operating system. AI agents your company owns reply in under 5 minutes, day or night, and run every touch, proof, and booking on software no vendor can switch off.

[THE FLOW]

01 **NEW LEAD** — Lands in the spine → 02 **INSTANT REPLY** — Under 5 min, 24/7 → 03 **CADENCE** — Multi-channel touches → 04 **PROOF** — Matched to awareness → 05 **BOOKED** — On your own system

[RUNS ON ITS OWN · 90%+]

+ An instant text, email, or call fires on every new lead.
+ Your own AI agent answers questions and books times, within set boundaries.
+ Touch sequences run by lead type until a yes or a clear no.
+ Replies and clicks update the lead's awareness stage.
+ Proof is sent by industry and by objection.
+ Reminders and no-show recovery run on every booking.
+ Cold leads are reactivated on a schedule.
+ Every touch is logged on the record.

[PEOPLE STILL OWN]

- Live conversations with hot leads
- Judgment calls on edge cases
- Writing and approving the message

[THE PHASE 5 STANDARD]

✓ 100% of leads answered in under 5 minutes by agents you own

✓ Agents, sequences, and proof library owned as IP

✓ No rented tool can switch it off

[F2 / SHEET C · LEAD NURTURE · P1 TO P5]

FROM MANUAL TO ENTERPRISE

[BEFORE · P1 MANUAL]

A lead fills out a form at 9pm and hears back two days later, if ever.

[AFTER · P5 ENTERPRISE]

The same lead gets a reply in under 5 minutes from an AI agent your company owns, and books before bed.

PHASE	HOW IT RUNS	OWNER'S ROLE	THE BUILD TO MOVE UP
P1	The founder calls back when there is time. Some leads never hear back.	The whole nurture team	Set a reply rule and a simple follow-up list.
P2	A rep works leads by hand. Reply time depends on the day.	Chases the reps	Fire an instant automatic reply on every lead.
P3	An automatic reply goes out. People follow up when they can.	Steps in on hot leads	Build full multi-touch cadences with proof.
P4	Under 5 minutes, 24/7. A set cadence with proof at each step.	Reviews the numbers weekly	Adapt to awareness stage with guarded AI agents.
THE ENTERPRISE GAP			
P5	Owned AI agents and nurture software run every touch, 24/7.	Owns the IP	Train the agents on every new objection.

THE LAST MILE

P4 → P5

AI agents with guardrails, awareness-stage detection, proof matched to objections, and sequences tuned by data every week. It is ongoing engineering that never finishes, because the market keeps moving.

[F2 / SHEET D · LEAD NURTURE · THE BUILD]

BUILD THE NURTURE ENGINE

Four builds take nurture from callbacks when there is time to an owned engine that answers every lead in under 5 minutes. Speed first, then cadence, then proof, then agents.

THE BUILD	WHAT YOU INSTALL	THE EXIT TEST
BUILD 01 **P1 → P2** A REPLY RULE	+ Write the rule: every lead gets a first touch the day it arrives. + Put every new lead on one follow-up list. + Write the first three messages: text, email, and voicemail. + Add a booking link to every message.	DONE WHEN **No lead goes a full day without a first touch.**
BUILD 02 **P2 → P3** THE INSTANT REPLY	+ Fire a text and email the moment a lead lands. + Create a call task for the owner with the lead's details. + Add booking confirmations and reminders. + Log every touch on the lead's record.	DONE WHEN **Every lead hears from you in under 5 minutes, day or night.**
BUILD 03 **P3 → P4** THE FULL CADENCE	+ Build sequences by lead type until a yes or a clear no. + Map content to the five awareness stages. + Tag case studies and reviews by industry and objection. + Add no-show recovery and old-lead reactivation.	DONE WHEN **Every lead gets a set number of touches, with proof at each step.**
THE ENTERPRISE GAP · THE LAST BUILD		
BUILD 04 **P4 → P5** OWNED AI AGENTS	+ Train agents on your offers, FAQs, and objections. + Let agents answer, qualify, and book inside set boundaries. + Read awareness stage from replies and adjust the next touch. + Tune the sequences every week from conversion data.	DONE WHEN **Agents you own run every touch. People take the hot leads.**

THE BUILD RULE

Speed comes before sequences. A cadence that starts two days late belongs to a competitor.

[F2 / SHEET E · LEAD NURTURE · THE BRIDGE]

THE BRIDGE

HOW WE BUILD YOUR NURTURE ENGINE WITH YOU.

The bridge is how SOLTECA carries lead nurture from the phase you score today to Phase 5. We run the Machine Method on it, gate by gate, while your team keeps running the business.

#	GATE	WHAT WE DO ON F2	EXIT ARTIFACT
01	DESIGN	Map every lead type, every touch, and the questions leads ask. Specify cadences, awareness stages, and agent boundaries.	Nurture architecture document
02	BUILD	Instant reply first, then cadences, the proof library, booking, and AI agents last.	Working nurture engine
03	TEST	Send test leads at 9pm, on weekends, and with hard questions. Break the hand-offs on purpose.	Test log, every path
04	LAUNCH	Turn on new leads first, then load old leads into reactivation. Train reps on the hand-off rules.	Live nurture
05	OPTIMIZE	Read reply time, touches per lead, booked-call rate, and show rate. Rewrite the weak steps.	Weekly performance read
06	SCALE	Train the agents on every new objection and extend cadences to new offers.	Next roadmap

[THE OWNED STACK WE INSTALL]

01 CAPTURE
Every reply, click, and call logged the moment it happens.

02 DATA SPINE
Each lead's touches, stage, and awareness on one record.

03 LOGIC
Cadence rules by lead type, stage, and response.

04 AI AGENTS
Agents that answer, qualify, and book in under 5 minutes, 24/7.

05 APPS
A rep console for live conversations and agent hand-offs.

06 OWNED IP
Agents, sequences, and the proof library owned by you.

[YOUR TEAM'S PART]

- Record the questions leads ask most
- Share your best proof and approve the message
- Name who takes the hot hand-offs

[WHAT YOU OWN AT THE END]

- ✓ Speed to lead under 5 minutes, day or night
- ✓ Agents trained on your business
- ✓ A proof library tagged by objection

[F3 / SHEET A · THE FUNCTION]

F3 CONVERSION

TURN CONVERSATIONS INTO A YES.

THE QUESTION	What happens, step by step, from the booked call to the signed deal?

Conversion is the sales system. It covers what the conversation looks like, the script for each price point, and the planned experience that makes saying yes feel obvious. A real sales system makes the result depend on the process, so a new rep can follow it and get close to what the founder gets.

F3.1 PRE-CALL
Confirmation, proof before the call, and a prep brief on every lead.

F3.2 THE SCRIPT
One per offer and price point: discovery, diagnosis, prescription, and close.

F3.3 THE EXPERIENCE
Every step from first call to signature, planned and the same for everyone.

F3.4 PROPOSAL
Built from the record and sent the same day, with no retyping.

F3.5 OBJECTIONS
Every common objection written down, with the answer and the proof.

F3.6 CLOSE AND PAYMENT
E-signature, payment, and a clean handoff to fulfillment.

[THE NUMBERS THAT MATTER]

+ Show rate
+ Close rate by offer and by rep
+ Average deal size
+ Days from first call to cash

[WHERE THE MONEY LEAKS]

! Proposals go out days late.
! Nobody follows up after the quote.
! Every rep sells a different way.

[F3 / SHEET B · CONVERSION AT PHASE 5]

THE SALES ENGINE

[WHAT ENTERPRISE LOOKS LIKE HERE]

An owned sales engine. Your scripts, AI prep briefs, proposals, contracts, and payments run in apps built for your offers, on data your company owns.

[THE FLOW]

01 **BOOKED** — From nurture → 02 **PREP** — Brief on every lead → 03 **CONVERSATION** — Scripted by offer → 04 **PROPOSAL** — Same day, from record → 05 **SIGNED + PAID** — In your own app

[RUNS ON ITS OWN · 90%+]

+ A confirmation and proof sequence runs before every call.
+ An AI prep brief lands before each call.
+ Calls are recorded, transcribed, and scored against the script.
+ Your own proposal app builds every proposal from the record in minutes.
+ Every quote is followed up until there is a decision.
+ E-signature and payment collection run on their own.
+ Deals move stages automatically as things happen.
+ Handoff to fulfillment carries the full context.

[PEOPLE STILL OWN]

- The conversation itself
- Diagnosis and judgment on fit
- Pricing exceptions

[THE PHASE 5 STANDARD]

✓ Proposal and contract apps owned by you
✓ Call intelligence running on your own data
✓ Payments wired into your own stack

[F3 / SHEET C · CONVERSION · P1 TO P5]

FROM MANUAL TO ENTERPRISE

[BEFORE · P1 MANUAL]

Sales stop when the founder takes a vacation.

[AFTER · P5 ENTERPRISE]

A new rep opens your own sales app and it walks them through every deal.

PHASE	HOW IT RUNS	OWNER'S ROLE	THE BUILD TO MOVE UP
P1	The founder closes almost every deal. Each sale goes differently.	The closer	Write down the sale that works and turn it into a script.
P2	Reps sell their own way. There is no shared script.	Rescues stalled deals	One script per offer and one pipeline with defined stages.
P3	A script and a pipeline exist. Follow-up after a quote is memory.	Closes the big ones	Automate proposals, follow-up, e-sign, and payment.
P4	A script per price point and a planned experience. Paperwork runs itself.	Coaches from the numbers	Add call scoring, AI prep, and close-rate analytics.
THE ENTERPRISE GAP			
P5	Custom sales apps run AI prep, proposals, e-sign, and payment on your stack.	Owns the IP	Ship new offers into the sales app.

THE LAST MILE

P4 → P5

Call intelligence, scoring against the script, proposals generated from the record, and payment rails wired into the CRM. Each one touches money and contracts, so it has to be built and tested with care.

[F3 / SHEET D · CONVERSION · THE BUILD]

BUILD THE SALES ENGINE

Four builds take conversion from the founder's personal talent to a sales system a new rep can follow. Write the sale down, standardize it, automate the paperwork, then add intelligence.

THE BUILD	WHAT YOU INSTALL	THE EXIT TEST
BUILD 01 **P1 → P2** THE WRITTEN SALE	+ Record the founder's next five sales calls. + Write the steps: discovery, diagnosis, prescription, close. + List every objection with the answer that works. + Define pipeline stages from booked call to paid.	DONE WHEN **Someone besides the founder can read how a sale is made.**
BUILD 02 **P2 → P3** ONE SCRIPT, ONE PIPELINE	+ Write one script per offer and price point. + Set entry and exit rules for every pipeline stage. + Build a proposal template for each offer. + Send a confirmation with proof before every call.	DONE WHEN **Every rep sells the same way, and every deal sits in a stage.**
BUILD 03 **P3 → P4** PAPERWORK RUNS ITSELF	+ Generate proposals from the record the same day. + Follow up every quote until there is a decision. + Wire e-signature and payment into the pipeline. + Hand off to fulfillment with the full deal context.	DONE WHEN **Nothing between yes and paid waits on a person's memory.**
THE ENTERPRISE GAP · THE LAST BUILD		
BUILD 04 **P4 → P5** THE SALES APP	+ Record, transcribe, and score calls against the script. + Send an AI prep brief before every call. + Build your own proposal, contract, and payment app. + Track close rate by offer, rep, and source.	DONE WHEN **A new rep opens the app and it walks them through every deal.**

THE BUILD RULE	Script the sale before you automate it. Software repeats whatever process you hand it.

[F3 / SHEET E · CONVERSION · THE BRIDGE]

THE BRIDGE

HOW WE BUILD YOUR SALES ENGINE WITH YOU.

The bridge is how SOLTECA carries conversion from the phase you score today to Phase 5. We run the Machine Method on it, gate by gate, while your team keeps running the business.

#	GATE	WHAT WE DO ON F3	EXIT ARTIFACT
01	DESIGN	Sit in on live calls and map every step from booked call to cash. Specify stages, documents, and payment rails.	Sales architecture document
02	BUILD	Pipeline and stages first, then scripts, proposals, e-sign, payment, and call intelligence last.	Working sales engine
03	TEST	Run test deals through every path: won, lost, discounted, refunded, and stalled.	Test log, every path
04	LAUNCH	Move open deals into the new pipeline and train each rep on the scripts and the app.	Live pipeline
05	OPTIMIZE	Read show rate, close rate, deal size, and days to cash. Coach from call scores.	Weekly performance read
06	SCALE	Ship new offers into the sales app and add the next price point.	Next roadmap

[THE OWNED STACK WE INSTALL]

01 CAPTURE
Booked calls, recordings, and signatures captured on the record.

02 DATA SPINE
Every deal, document, and payment tied to one record.

03 LOGIC
Stage rules, follow-up timing, and approval paths for pricing.

04 AI AGENTS
Prep briefs, call scoring, and quote follow-up.

05 APPS
Your own proposal, contract, and payment app.

06 OWNED IP
Scripts, playbooks, and call data owned by you.

[YOUR TEAM'S PART]

- Let us sit in on live calls
- Approve the scripts and pricing rules
- Name one sales lead to review the build

[WHAT YOU OWN AT THE END]

- ✓ A script for every offer and price point
- ✓ Proposals and payments on your own stack
- ✓ Call data that coaches every rep

[F4 / SHEET A · THE FUNCTION]

F4 FULFILLMENT

DELIVER MORE THAN THEY PAID FOR, EVERY TIME.

THE QUESTION	Does every customer get the same great experience, no matter who does the work?

Fulfillment is everything that happens after the yes: onboarding, the work itself, updates, quality, and the moment the customer realizes they got more than they paid for. It is where your reputation is made, and it decides whether ascension ever gets a chance.

F4.1 ONBOARDING
Welcome, kickoff, access, and expectations set right after the sale.

F4.2 DELIVERY WORKFLOW
Every job broken into stages with an owner and a deadline.

F4.3 COMMUNICATION
Customers updated before they think to ask.

F4.4 QUALITY CONTROL
Checklists and sign-offs before any stage is called done.

F4.5 OVER-DELIVERY
Planned moments that beat expectations on purpose.

F4.6 FEEDBACK LOOP
Satisfaction measured after every milestone.

[THE NUMBERS THAT MATTER]

+ Time to first value
+ On-time delivery rate
+ Customer satisfaction score
+ Refunds, rework, and complaints

[WHERE THE MONEY LEAKS]

! Customers chase you for updates.
! Quality depends on who does the job.
! Hand-offs between people drop details.

[F4 / SHEET B · FULFILLMENT AT PHASE 5]

THE DELIVERY ENGINE

[WHAT ENTERPRISE LOOKS LIKE HERE]

A proprietary delivery platform. Your own branded client portal and delivery app run onboarding, milestones, quality gates, and updates automatically, whoever is doing the work.

[THE FLOW]

01	→	02	→	03	→	04	→	05
SIGNED From the sales engine		**ONBOARD** Welcome and kickoff		**DELIVER** Stages, owners, dates		**UPDATE** Before they ask		**PORTAL** Your branded platform

[RUNS ON ITS OWN · 90%+]

- + The onboarding sequence fires the moment the deal is signed.
- + Projects and tasks are created from a template for each offer.
- + Work is assigned with owners and deadlines.
- + Customers log into your own branded portal for every update.
- + Quality checklists must pass before a stage can close.
- + Overdue work raises an alert before the customer notices.
- + Feedback requests go out after each milestone.
- + SOPs live inside the system, next to the work.

[PEOPLE STILL OWN]

- The craft of the work
- Judgment calls on the job
- Recovery when something goes wrong

[THE PHASE 5 STANDARD]

- ✓ A branded client portal you own
- ✓ Delivery workflows coded into your platform
- ✓ Runs the same without any one person

[F4 / SHEET C · FULFILLMENT · P1 TO P5]

FROM MANUAL TO ENTERPRISE

[BEFORE · P1 MANUAL]

Customers text the founder to ask what is happening.

[AFTER · P5 ENTERPRISE]

Customers log into your branded portal and see the update before they ask.

PHASE	HOW IT RUNS	OWNER'S ROLE	THE BUILD TO MOVE UP
P1	Delivery lives in the founder's head. Quality depends on who does it.	Does or checks every job	Write the steps of a great delivery as a checklist.
P2	Checklists exist but steps get skipped. Customers chase updates.	Fights fires	A project template per offer with owners and deadlines.
P3	Onboarding and some updates are automatic. Hand-offs still drop things.	Fixes the hand-offs	Connect the sales handoff, quality gates, and updates.
P4	Same documented experience. Updates, hand-offs, and checks run on their own.	Reviews quality numbers	Measure every milestone and engineer the wow.
THE ENTERPRISE GAP			
P5	Your own client portal and delivery app run the work end to end.	Owns the IP	Add features customers will pay more for.

THE LAST MILE

P4 → P5

Customer portals, milestone triggers, quality gates, and data that shows delivery against the standard across every job. It has to fit how your work is actually done, which means it is custom by nature.

[F4 / SHEET D · FULFILLMENT · THE BUILD]

BUILD THE DELIVERY ENGINE

Four builds take fulfillment out of the founder's head and into a platform that delivers the same experience on every job, whoever does the work.

THE BUILD	WHAT YOU INSTALL	THE EXIT TEST
BUILD 01 **P1 → P2** THE WRITTEN DELIVERY	+ Write each step of a great delivery as a checklist, per offer. + Turn the welcome and kickoff into a standard sequence. + Set a promised time to first value. + Name an owner for every stage.	DONE WHEN **A new team member can deliver the job from the checklist.**
BUILD 02 **P2 → P3** TEMPLATED PROJECTS	+ Build a project template per offer: stages, owners, dates. + Fire onboarding automatically when the deal is signed. + Send scheduled status updates to the customer. + Attach the SOP to every task.	DONE WHEN **Every project starts the same way, and customers stop chasing.**
BUILD 03 **P3 → P4** CONNECTED HAND-OFFS	+ Open each project from the sale with the full context. + Add quality gates that must pass before a stage closes. + Alert on overdue work before the customer notices. + Request feedback after every milestone.	DONE WHEN **Hand-offs carry every detail, and every job is checked.**

THE ENTERPRISE GAP · THE LAST BUILD

BUILD 04 **P4 → P5** THE CLIENT PLATFORM	+ Build a branded portal for updates, files, and approvals. + Code delivery workflows into your own platform. + Engineer planned over-delivery moments into the timeline. + Report delivery against the standard across every job.	DONE WHEN **Customers see the update in your portal before they ask.**

THE BUILD RULE — Document the great delivery before you scale it. Volume multiplies the process already in place.

[F4 / SHEET E · FULFILLMENT · THE BRIDGE]

THE BRIDGE

HOW WE BUILD YOUR DELIVERY ENGINE WITH YOU.

The bridge is how SOLTECA carries fulfillment from the phase you score today to Phase 5. We run the Machine Method on it, gate by gate, while your team keeps running the business.

#	GATE	WHAT WE DO ON F4	EXIT ARTIFACT
01	DESIGN	Walk each offer's delivery with the people who do the work. Specify stages, quality gates, updates, and the portal.	Delivery architecture document
02	BUILD	Project templates first, then onboarding, updates, quality gates, and the client portal last.	Working delivery engine
03	TEST	Run test projects end to end, including late tasks, failed checks, and unhappy customers.	Test log, every path
04	LAUNCH	Start new customers on the platform, migrate active projects, and train each role.	Live delivery
05	OPTIMIZE	Read time to first value, on-time rate, satisfaction, and rework. Fix the slowest stage.	Weekly performance read
06	SCALE	Add portal features customers will pay more for and template the next offer.	Next roadmap

[THE OWNED STACK WE INSTALL]

01 CAPTURE
Signed deals, approvals, and feedback captured on the record.

02 DATA SPINE
Every project, milestone, and score on the customer record.

03 LOGIC
Stage rules, quality gates, and escalation timing.

04 AI AGENTS
Agents that draft updates, flag risk, and request feedback.

05 APPS
A branded client portal and a delivery app for your team.

06 OWNED IP
Workflows, SOPs, and the platform owned by you.

[YOUR TEAM'S PART]

- Walk us through a great delivery
- Approve the stages and quality gates
- Name one delivery lead to review the build

[WHAT YOU OWN AT THE END]

- ✓ A branded client portal you own
- ✓ Delivery that runs the same without any one person
- ✓ Quality data across every job

[F5 / SHEET A · THE FUNCTION]

F5 ASCENSION

REFERRALS, REVIEWS, UPSELLS, DOWNSELLS, CONTINUITY/RENEWALS.

THE QUESTION	What is the planned path to the next referral, the next review, and the next purchase?

Ascension is what happens after a great delivery. It turns happy customers into referrals and reviews, offers the right upsell or downsell at the right moment, and keeps them on continuity plans that renew. The customer already trusts you, so this is the cheapest revenue you will ever earn. It is also the function most businesses never build.

F5.1 REFERRALS
A planned ask, an easy way to share, and a reward that brings their friends.

F5.2 REVIEWS
Asked for at the moment the customer is happiest.

F5.3 UPSELLS
The next offer up your value ladder, presented at the right moment.

F5.4 DOWNSELLS
A smaller offer that keeps the customer who was about to walk.

F5.5 CONTINUITY / RENEWALS
Recurring plans that renew on their own, with reminders before anything lapses.

F5.6 LIFETIME VALUE
Past customers reactivated, and revenue per customer tracked over years.

[THE NUMBERS THAT MATTER]

+ Referral rate and reviews per month
+ Upsell and downsell take rate
+ Continuity and renewal rate
+ Lifetime value by customer type

[WHERE THE MONEY LEAKS]

! Nobody asks for referrals.
! Customers forget you once the job is done.
! Upsells depend on a rep happening to notice.

[F5 / SHEET B · ASCENSION AT PHASE 5]

THE ASCENSION ENGINE

[WHAT ENTERPRISE LOOKS LIKE HERE]

An owned customer platform. Referrals, reviews, upsells, downsells, and renewals run through your own app and member portal, compounding on customer data your company owns.

[THE FLOW]

01	→	02	→	03	→	04	→	05
REVIEW At the peak moment		**REFER** Ask and reward		**UPSELL** Next offer up		**DOWNSELL** Save the customer about to walk		**RENEW** Continuity in your own app

[RUNS ON ITS OWN · 90%+]

- + Review requests go out at the moment of peak happiness.
- + Referral asks are sent and tracked, with rewards paid.
- + Upsell offers trigger from milestones, results, and usage.
- + Continuity plans bill and renew, with reminders before anything lapses.
- + Past customers get reactivation campaigns on a schedule.
- + Downsell offers catch customers about to cancel or walk on price.
- + Customers manage renewals and plan changes inside your own app.
- + Referrals flow back into F1 as tagged leads, closing the loop.

[PEOPLE STILL OWN]

- · High-value relationships
- · Designing the next offers
- · The thank-yous that matter

[THE PHASE 5 STANDARD]

- ✓ Referral and loyalty system owned as IP
- ✓ Customer data never leaves your spine
- ✓ Every customer on the full path

[F5 / SHEET C · ASCENSION · P1 TO P5]

FROM MANUAL TO ENTERPRISE

[BEFORE · P1 MANUAL]

Every month starts from zero new customers.

[AFTER · P5 ENTERPRISE]

Every customer lives inside your own app, which keeps offering the next step.

PHASE	HOW IT RUNS	OWNER'S ROLE	THE BUILD TO MOVE UP
P1	Job done, customer gone. No reviews or referrals asked.	Hopes they come back	Ask every happy customer for a review and a referral.
P2	Asks happen when someone remembers.	Asks for favors	Automate a review and referral request after every job.
P3	Review requests are automatic. Upsells happen when a rep spots one.	Spots the upsells	Build the full path: upsells, downsells, continuity, reactivation.
P4	A planned path for every customer, on a schedule.	Designs the next offers	Track lifetime value by type and forecast repeat revenue.
THE ENTERPRISE GAP			
P5	Your own customer app runs referrals, reviews, upsells, downsells, and renewals.	Owns the IP	Add new offers to the ladder inside the app.

THE LAST MILE

P4 → P5

Lifetime value models, triggers tied to milestones and usage, referral tracking back into lead generation, and repeat-revenue forecasting. It needs clean data from all four functions before it can work.

[F5 / SHEET D · ASCENSION · THE BUILD]

BUILD THE ASCENSION ENGINE

Four builds turn every finished job into the next sale through referrals, reviews, upsells, downsells, and continuity. Every build sells to people who have already said yes once.

THE BUILD	WHAT YOU INSTALL	THE EXIT TEST
BUILD 01 **P1 → P2** THE PLANNED ASK	+ Ask every happy customer for a review and a referral. + Map the ladder: the offer up, the offer down, the plan. + Write the referral ask and choose the reward. + List past customers worth bringing back.	DONE WHEN **Every finished job ends with a review ask and a referral ask.**
BUILD 02 **P2 → P3** AUTOMATIC ASKS	+ Fire a review request at the moment of peak happiness. + Send referral asks with a tracked link and a reward. + Set renewal reminders before any plan lapses. + Tag every customer by offer and purchase date.	DONE WHEN **Reviews and referrals arrive without anyone remembering to ask.**
BUILD 03 **P3 → P4** THE FULL PATH	+ Trigger upsells from milestones, results, and usage. + Build downsells for customers who cancel or stall on price. + Move one-time buyers onto continuity with auto-renewal. + Run reactivation for past customers on a schedule.	DONE WHEN **Every customer is on a planned path, on a schedule.**

THE ENTERPRISE GAP · THE LAST BUILD

THE BUILD	WHAT YOU INSTALL	THE EXIT TEST
BUILD 04 **P4 → P5** THE CUSTOMER APP	+ Build a member app to renew, change plans, and refer. + Model lifetime value by type and forecast repeat revenue. + Send referrals back into F1 as tagged leads. + Add new offers to the ladder inside the app.	DONE WHEN **Every customer lives in your app, and repeat revenue is a forecast.**

THE BUILD RULE	Build F5 on a strong F4. A referral ask after a weak delivery spreads the weak delivery.

[F5 / SHEET E · ASCENSION · THE BRIDGE]

THE BRIDGE

HOW WE BUILD YOUR ASCENSION ENGINE WITH YOU.

The bridge is how SOLTECA carries ascension from the phase you score today to Phase 5. We run the Machine Method on it, gate by gate, while your team keeps running the business.

#	GATE	WHAT WE DO ON F5	EXIT ARTIFACT
01	DESIGN	Map the value ladder, each customer type, and the moments of peak happiness. Specify triggers, offers, and rewards.	Ascension architecture document
02	BUILD	Customer tags first, then reviews and referrals, upsell and downsell triggers, continuity billing, and the app last.	Working ascension engine
03	TEST	Run test customers through every path: refer, review, upsell, downsell, renew, cancel, and lapse.	Test log, every path
04	LAUNCH	Load current and past customers, start the schedule, and train the team on every offer.	Live ascension
05	OPTIMIZE	Read referral rate, reviews per month, take rate on each offer, and renewal rate.	Weekly performance read
06	SCALE	Add offers to the ladder and model lifetime value by customer type.	Next roadmap

[THE OWNED STACK WE INSTALL]

01 CAPTURE
Reviews, referrals, renewals, and plan changes captured on the record.

02 DATA SPINE
Every purchase, referral, and renewal on one customer record.

03 LOGIC
Triggers for asks, offers, saves, and renewals by milestone and usage.

04 AI AGENTS
Agents that time the ask, present the offer, and save cancellations.

05 APPS
A member app for renewals, plan changes, and referrals.

06 OWNED IP
Referral, loyalty, and ladder logic owned by you.

[YOUR TEAM'S PART]

- Define the value ladder and the rewards
- Name the moments customers are happiest
- Approve the save and downsell rules

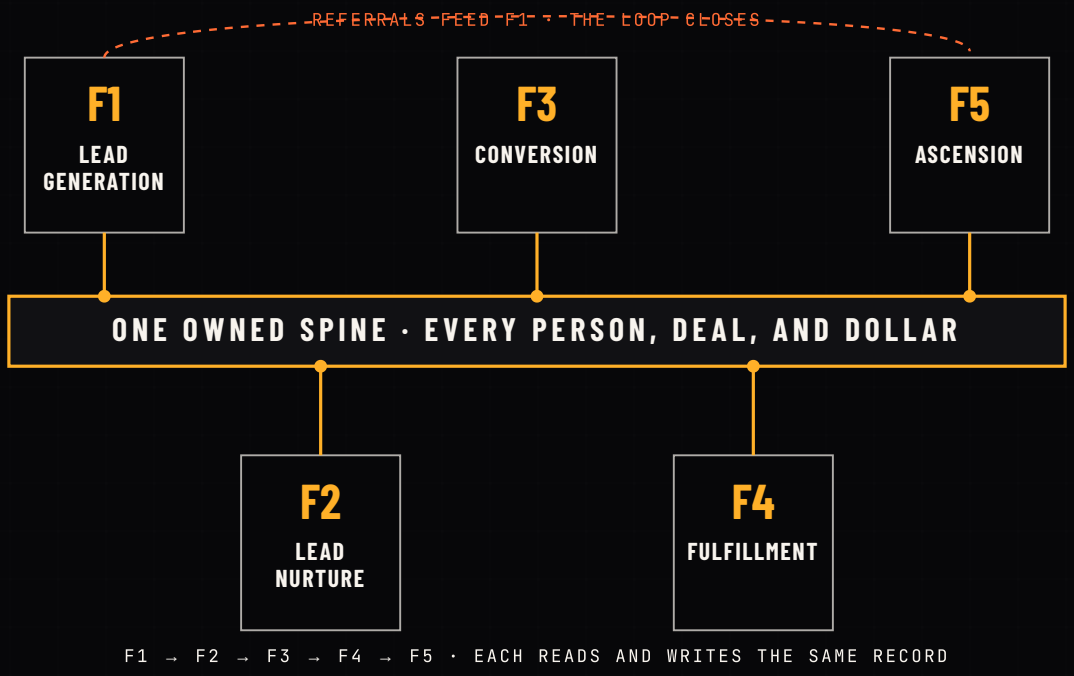
[WHAT YOU OWN AT THE END]

- ✓ Referral and loyalty system owned as IP
- ✓ Continuity and renewals on your own stack
- ✓ A lifetime value model by customer type

[32 / THE C5_GROWTH_ENGINE]

THE C5_GROWTH_ENGINE

At Phase 5, the five engines stop being five projects. They become one engine on one owned record, and each function makes the next one stronger.



[WHY ONE SPINE]

When all five functions share one record, a referral in F5 arrives in F1 already tagged, a closed deal in F3 starts onboarding in F4 with full context, and every dashboard tells the same truth.

[WHAT A BUYER PAYS FOR]

+ Revenue that does not depend on the founder's calendar
+ Proprietary software and apps the company owns
+ IP and data on the balance sheet, not rented from vendors
+ An operating system that runs without the founder

[IN PLAIN TERMS]

Companies can't exit on rented infrastructure. The C5_GROWTH_ENGINE is what turns a business into an asset.

[33 / WHY P4 TO P5 IS THE CEILING]

THE ENTERPRISE GAP

A disciplined owner can climb from Phase 1 to Phase 4 with this blueprint. Phase 5 across all five functions runs to 555 systems, each designed, built, tested, launched, optimized, and scaled. That is a full engineering program.

5	× 111	× 6	3,330
CORE FUNCTIONS	SYSTEMS EACH	MACHINE METHOD GATES	EXIT ARTIFACTS TO P5

TIME

P5 NEEDS — Months of design, build, and testing across every function, done in order.

YOU HAVE — **A week already full of running the business.**

ENERGY

P5 NEEDS — Deep focus on engineering problems for months at a stretch.

YOU HAVE — **Attention split across sales, people, and fires.**

RESOURCES

P5 NEEDS — Software architects, engineers, AI builders, and testers shipping owned apps as one team.

YOU HAVE — **A team hired and trained to deliver your service.**

CAPACITY

P5 NEEDS — Rebuilding the business while it keeps serving customers, with no lost revenue during the switch.

YOU HAVE — **No spare people to run the old way and build the new one at the same time.**

Write down how many hours your team has free each week for engineering, after running the business. Most owners write a number close to zero. That number is the ceiling.

YOUR HOURS / WEEK

[34 / THE PARTNERSHIP]

WE BUILD IT FOR YOU

We partner with you and build your C5_GROWTH_ENGINE with the Machine Method, one constraint at a time, while your team keeps running the business. You give us hours. We give you back the system.

01	02	03	04	05	06
DESIGN	**BUILD**	**TEST**	**LAUNCH**	**OPTIMIZE**	**SCALE**
Exit: Architecture document	Exit: Working system	Exit: Test log	Exit: Live operation	Exit: Performance read	Exit: Next roadmap

WHEN	WHAT WE NEED FROM YOU	YOUR TIME
WEEK 1	Two mapping sessions with the people who do the work	3 to 4 hours
WEEK 1	Access to the systems you already run	30 minutes
WEEK 1	Written approval on the architecture	1 hour
WEEKS 2 TO 3	One named reviewer for questions	2 hours a week
WEEK 4	Cutover window and role-based training	2 to 3 hours
ONGOING	One call to read the numbers and name the next constraint	45 minutes a week

THE WINDOW

30-day build-out

Scope sets the timeline. The first engine goes live inside a 30-day window.

THE STANDARD

Under 5 minutes

Speed to lead built in from day one, day or night.

THE ASSET

Yours to keep

Everything we build is owned by your company, with full IP transfer.

BOOK YOUR WEIGH-IN REVIEW

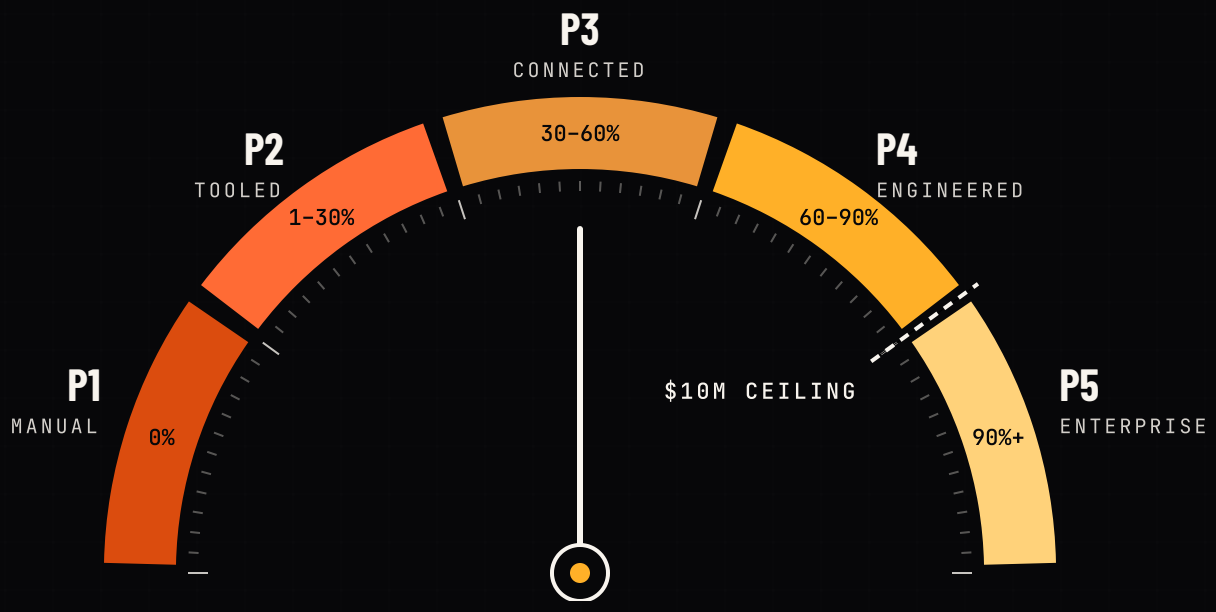
Take Part Two first and bring your number.

SOLTECA.IO/LAUNCH →

[35 / CONTINUE TO PART TWO]

NOW STEP ON THE SCALE

Part One gave you the map: all five functions, all five phases, and the build that moves each one up. Part Two tells you where you stand on it.



10 MINUTES

The weigh-in

Score each function against five plain statements.

YOUR NUMBER

Your phase

A total from 5 to 25 that places you on the scale.

YOUR CONSTRAINT

Where to start

The lowest function, and its Sheet C row in Part One.

PART TWO · THE SCALE

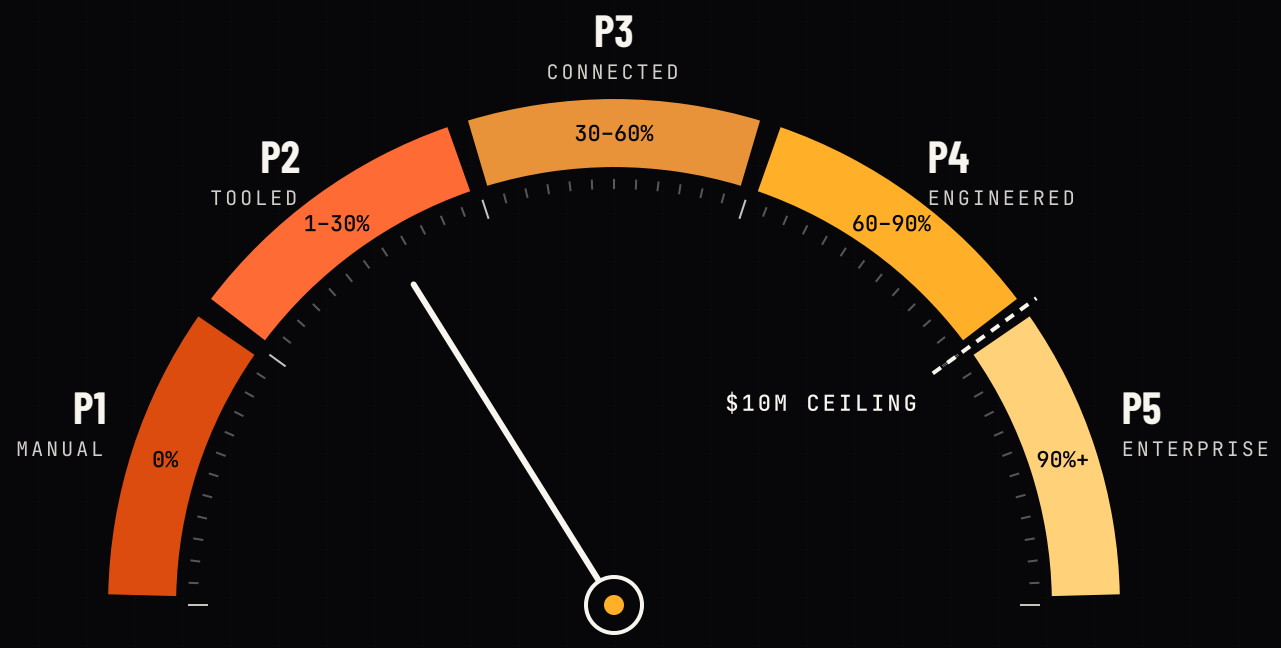
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[PART TWO · THE 5 PHASES OF BUSINESS AUTOMATION]

THE SCALE

STEP ON IT.

In 10 minutes, find out which phase of automation your business is in, and the one constraint keeping it under $10M a year.



5	5	1
PHASES OF AUTOMATION	CORE FUNCTIONS WEIGHED	CONSTRAINT TO FIX FIRST

[00 / START HERE]

TEN MINUTES ON THE SCALE

Part One showed what each function looks like at every phase. Part Two gives you a number: how much of your business runs on its own, and which part is holding the rest back.

01	THE MOMENT	Why you need a number	03
02	THE CEILING	Why most businesses stall under $10M	04
03	THE PIPELINE	The 5 core functions of every business	05
04	THE SCALE	The 5 phases of automation	06
05	PHASE ANATOMY	What each phase feels like from inside	07
06	THE WEIGH-IN	Score all five functions	08
07	YOUR READING	Your phase and your constraint	11
08	THE CRASH DIET	Why more ads make it heavier	12
09	THE DECONSTRAINT LOOP	One constraint at a time	13
10	THE MACHINE METHOD	Six phases to build each system	14
11	INSTALL IT	Run the weigh-in with AI	15
12	THE NEXT STEP	Bring us your number	16

PATH A · ON PAPER

Score it with your team

Print sheets 08 to 10. Sit with your leadership team. Score each function as it runs today. Ten minutes, one pen.

PATH B · WITH AI

Upload it and type one line

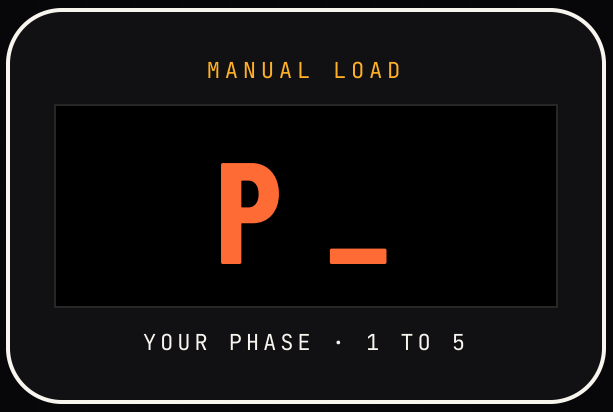
Upload this file to Claude, ChatGPT, or Cursor and paste the prompt on sheet 15. It walks you through the weigh-in and names your constraint.

[01 / THE MOMENT]

STEP ON THE SCALE

Ask anyone who has lost real weight when it started. Most of them name the same moment. They stepped on the scale. They already knew they were heavy. The number made it real, and it told them where to begin.

Your business has a weight too. You feel it as long days, leads that never got a call back, and a revenue line that climbed for years and then went flat. Almost no owner has ever weighed it. They guess, and the guess is always lighter than the truth.



[DEFINITION]

MANUAL LOAD

Any task that only happens because a person remembered to do it. Every one of them is weight your business carries.

A callback. A follow-up text. A quote. An invoice reminder. A review request. Each one sits on someone's memory, and most of them sit on yours.

This blueprint is the scale. It weighs the five functions every business runs on and tells you, in plain numbers, which phase of automation you are in today.

[IN PLAIN TERMS]

You cannot fix a weight you have never measured. Ten minutes on this scale gives you the number and the place to start.

[02 / THE CEILING]

WHY BUSINESSES STOP UNDER $10M

1 IN 250

Roughly 1 in 250 businesses ever crosses $10M in yearly revenue.

SOURCE: VERNE HARNISH, SCALING UP

The other 249 rarely run out of demand or effort. They run out of hours. In a manual business, every new customer adds work for a person. Revenue climbs, and headcount, mistakes, and the founder's decisions climb right beside it. Somewhere under $10M the founder has no hours left to give, and growth stops.



FIG 02 · SHAPE OF THE CURVE, FOR ILLUSTRATION. NOT CLIENT DATA.

An engineered business grows on a different curve. Systems take on the defined, repeatable work, so each new customer adds far less manual load. People spend their week on judgment, and the founder's hours stop being the limit.

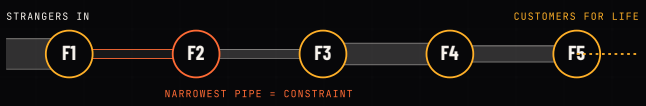
[IN PLAIN TERMS]

Your revenue ceiling is set by how much of the business still needs a person to move it.

[03 / THE PIPELINE]

EVERY BUSINESS IS A PIPELINE

Every customer you have ever had moved through the same five functions, in the same order, from stranger to repeat buyer. Think of your business in these five terms and the revenue you are leaving on the table becomes easy to see.



F1

LEAD GENERATION

Get the right people into your world.

Where do leads come from, and what offer pulls them in?

F2

LEAD NURTURE

Work every lead until it is ready to talk.

Does every lead get a reply in under 5 minutes, day or night?

F3

CONVERSION

Turn the conversation into a yes.

Is there a script and a planned experience for each price point?

F4

FULFILLMENT

Deliver more than they paid for, every time.

Does every customer get the same great experience?

F5

ASCENSION

Referrals, reviews, upsells, downsells, and renewals.

Is there a planned path to the next purchase and the next referral?

A pipeline can only carry as much as its narrowest pipe. If nurture drops half your leads, the best ads in the world still deliver half. If fulfillment is shaky, ascension never gets a chance. One function sets the speed for all five.

Most owners pour their money into F1 and forget F5. Ascension is where the most profitable revenue lives, because the customer already trusts you.

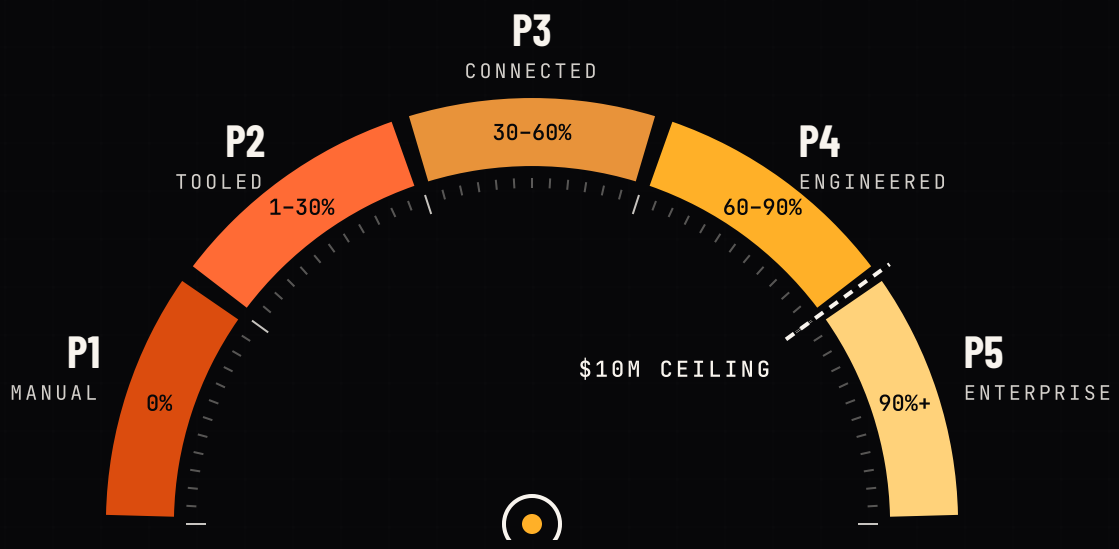
[IN PLAIN TERMS]

Five functions, one pipeline. Your revenue moves at the speed of the weakest one.

[04 / THE SCALE]

THE 5 PHASES OF AUTOMATION

Every business sits somewhere on this scale. Phase 1 is fully manual. Phase 5 is enterprise, with more than 90% of the defined, repeatable work running on its own.



PHASE	NAME	AUTOMATED	WHO RUNS IT	WHAT CAPS IT
P1	MANUAL	0%	The founder	The founder's hours
P2	TOOLED	1–30%	People, with rented tools	The team's hours
P3	CONNECTED	30–60%	Systems, with the founder routing	The founder's decisions
P4	ENGINEERED	60–90%	An owned system, people on judgment	The last mile nobody has time to build
	THE $10M CEILING · THE ENTERPRISE GAP			
P5	ENTERPRISE	90%+	Owned software and AI agents	The size of the market

[IN PLAIN TERMS]

Phases 1 to 4 can be climbed with effort and the C5_GROWTH_ENGINE Blueprint in Part One. The jump to Phase 5 takes engineering capacity most teams do not have.

[05 / PHASE ANATOMY]

WHAT EACH PHASE FEELS LIKE

P1

MANUAL · 0% **The founder is the system.**

Every lead, quote, and invoice moves because someone moved it. The plan lives in your head, your texts, and your sticky notes.

BREAKS WHEN · You get busy, sick, or take a week off.

P2

TOOLED · 1–30% **Rented tools, held together by people.**

You have a CRM, a calendar link, and an email tool. People copy data between them and remember the follow-ups.

BREAKS WHEN · A key employee quits and takes the know-how.

P3

CONNECTED · 30–60% **Systems talk. The founder still routes.**

Some workflows fire on their own. Every exception, discount, and judgment call still comes back to you.

BREAKS WHEN · Volume rises and every decision waits in your inbox.

P4

ENGINEERED · 60–90% **One owned system. People on judgment.**

One record runs across all five functions. Every defined, repeatable task runs on its own. Your team spends its week on decisions.

BREAKS WHEN · The last 10 to 30% needs engineering time nobody on the team has.

P5

ENTERPRISE · 90%+ **Owned infrastructure runs it.**

Proprietary software, apps, and AI agents run the work. The company owns the code, the data, and the IP, so no vendor can raise the price or switch it off.

BREAKS WHEN · The market is the only real limit.

[IN PLAIN TERMS]

If you read Phase 1 or 2 and felt a little seen, that is the scale doing its job.

[06 / THE WEIGH-IN · PART 1]

THE WEIGH-IN

For each function, mark the one statement that is true today. Score the business as it runs this week. The phase number is your score. If you sit between two, pick the lower one.

F1 LEAD GENERATION

SCORE ____

◯	P1	Leads come from referrals and the founder's network. Nobody can say where next month's leads will come from.
◯	P2	We pay for ads or an agency. Leads land in different places, and nobody knows what a lead costs.
◯	P3	Leads from every source land in one CRM, and the source is tracked on most of them.
◯	P4	Every lead carries its source and cost. We own our offers and lead magnets, and we know which channel pays.
◯	P5	Leads enter through software we own, and every channel feeds our own data spine.

F2 LEAD NURTURE

SCORE ____

◯	P1	The founder or a rep calls back when they get a chance. Some leads never hear from us.
◯	P2	Someone works leads by hand from a list. Reply time depends on who is working that day.
◯	P3	An automatic text or email goes out right away. A person follows up later, when they can.
◯	P4	100% of leads get a reply in under 5 minutes, day or night, with a set number of touches and proof at each step.
◯	P5	AI agents we own reply, follow up, and book on our own software, 24/7.

[06 / THE WEIGH-IN · PART 2]

THE WEIGH-IN, CONTINUED

Same rule. One mark per function, scored on how it runs today.

F3 CONVERSION		SCORE
◯	P1	The founder closes almost every deal, and each sale goes a little differently.
◯	P2	Reps sell in their own way. There is no shared script.
◯	P3	There is a script and a pipeline. Follow-up after a quote still depends on someone's memory.
◯	P4	Each price point has its own script and a planned experience. Proposals, follow-ups, and payment run on their own.
◯	P5	Sales run in our own apps: AI prep, proposals, contracts, and payment.

F4 FULFILLMENT		SCORE
◯	P1	Delivery lives in the founder's head. Quality depends on who does the job.
◯	P2	There are checklists, but steps get skipped. Customers chase us for updates.
◯	P3	Onboarding and updates are partly automatic. Hand-offs between people still drop things.
◯	P4	Every customer gets the same documented experience. Updates, hand-offs, and quality checks run on their own.
◯	P5	Customers use our own branded portal, and our delivery platform runs the work.

[06 / THE WEIGH-IN · PART 3]

THE WEIGH-IN, FINAL FUNCTION

F5 ASCENSION

SCORE ____

◯	P1	Once the job is done, the customer is gone. We rarely ask for reviews or referrals.
◯	P2	We ask for reviews and referrals when someone remembers.
◯	P3	A review request goes out after every job. Upsells happen when a rep spots them.
◯	P4	Every customer gets a planned path to refer, review, upsell, downsell, and renew, on a schedule.
◯	P5	Our own customer app runs referrals, reviews, upsells, downsells, and renewals on our own data.

YOUR SCORECARD

F1	LEAD GENERATION	____
F2	LEAD NURTURE	____
F3	CONVERSION	____
F4	FULFILLMENT	____
F5	ASCENSION	____

TOTAL · 5 TO 25

LOWEST FUNCTION

[IN PLAIN TERMS]

Add the five scores for your total. Circle the lowest one. Then turn the page and read your number.

[07 / YOUR READING]

READ YOUR NUMBER

5–9	P1 · MANUAL	The business is the founder. Every hour you step away costs revenue.
10–14	P2 · TOOLED	You pay for tools, and people are still the glue between them.
15–19	P3 · CONNECTED	Your decisions are the bottleneck. Part One maps your next builds.
20–23	P4 · ENGINEERED	You are at the $10M ceiling. The last mile is an engineering job.
24–25	P5 · ENTERPRISE	You run on owned infrastructure. The IP sits on your balance sheet.

YOUR TOTAL = YOUR PHASE

Two people can weigh the same and carry it in very different places. The total tells you how heavy the business is overall.

YOUR LOWEST = YOUR CONSTRAINT

The function with the lowest score is where to start. If two tie, pick the one earlier in the pipeline, because everything after it inherits the problem.

[WORKED EXAMPLE · FOR ILLUSTRATION]

F1	F2	F3	F4	F5	TOTAL
4	1	3	3	2	13 · P2

This business has decent lead flow and a working sales process. Lead nurture scores a 1, so leads wait hours for a call back and many never get one. Doubling the ad budget here would double the leads that go cold. The constraint is F2.

[IN PLAIN TERMS]

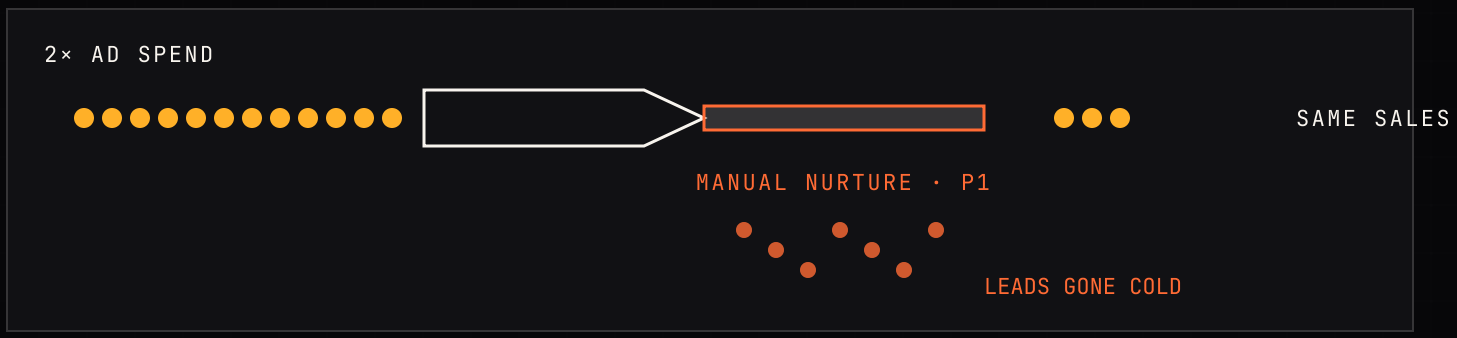
Your total tells you how heavy the business is. Your lowest score tells you where to start.

[08 / THE OLD WAY]

THE CRASH DIET

When growth stalls, most owners buy more ads. That is the crash diet. It feels like action, and for a few weeks the numbers move. Then the weight comes back, because nothing about the body changed.

More leads poured into a manual pipeline land on the same people, the same slow replies, and the same forgotten follow-ups. You pay more to lose the same deals faster, and the extra work lands on your desk.



	THE CRASH DIET	THE NEW METABOLISM
THE MOVE	Spend more on ads	**Build the system at the constraint**
WHERE NEW LEADS GO	Into the same manual pipeline	**Into a pipeline that can carry them**
COST OVER TIME	Rises every month you keep it up	**Front-loaded, then compounds**
FOUNDER'S HOURS	More leads, more work for you	**The system carries the new load**
WHAT YOU OWN AFTER	A bigger ad bill	**An asset on your balance sheet**

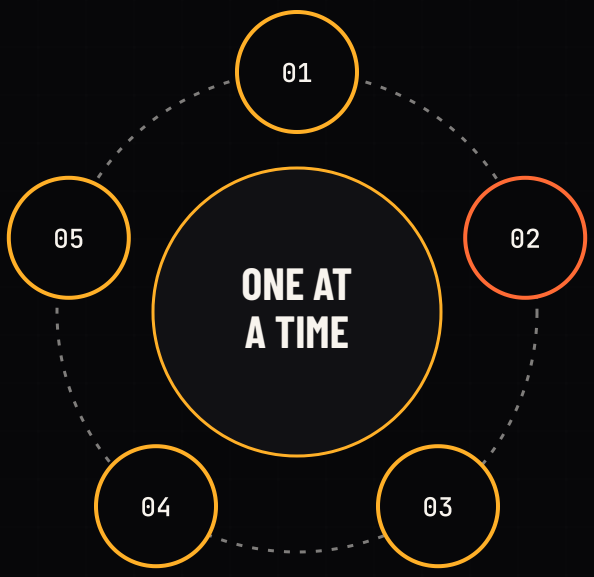
[IN PLAIN TERMS]

Ads add leads. Systems add capacity. Capacity at the constraint is what raises the ceiling.

[09 / THE DECONSTRAINT LOOP]

WIDEN THE NARROWEST PIPE

This is the deconstraining framework. Instead of pushing harder on everything, you find the one function holding the other four back and engineer it until it stops being the limit.



01 **WEIGH**
Score all five functions on the scale.

02 **FIND**
The lowest score is the constraint.

03 **BUILD**
Run the Machine Method on that one function.

04 **MEASURE**
Step back on the scale and read the new number.

05 **REPEAT**
A new constraint appears. Start the loop again.

RULE 01
Fix the constraint first.
Improving a function that is not the constraint feels productive and moves no revenue.

RULE 02
One at a time.
Each constraint you remove reveals the next one. That is how growth compounds.

RULE 03
Systems before spend.
Raise ad spend only after the pipeline behind it can carry the extra leads.

[IN PLAIN TERMS]

Find the one thing holding the business back. Build a system for it. Weigh again. Do it again.

[10 / THE MACHINE METHOD]

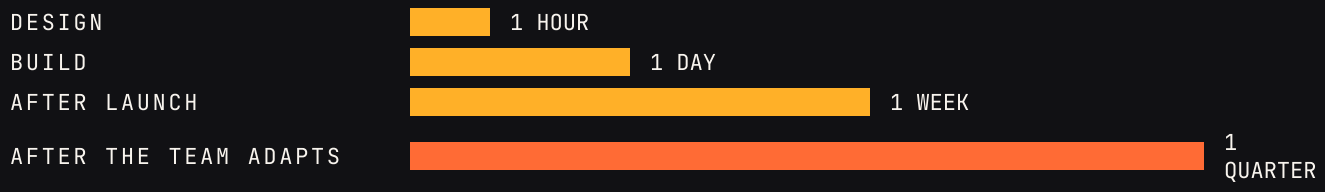
THE MACHINE METHOD

Six phases, in order, on one constraint. Each ends with an artifact, and nothing moves forward until it exists.

#	PHASE	WHAT HAPPENS	EXIT ARTIFACT
01	**DESIGN**	Map how the work really runs, with the people who do it. Specify the data, stages, logic, and every connection.	Architecture document
02	**BUILD**	Build in order: the record first, then capture, conversion, reporting, and AI agents last.	Working system
03	**TEST**	Run real records through every path, including the ones that fail. Break the connections on purpose.	Test log
04	**LAUNCH**	Move live data, switch over with a way back, and train each role on its own work.	Live operation
05	**OPTIMIZE**	Measure against targets and remove the steps the team quietly works around.	Performance read
06	**SCALE**	Find the constraint that showed up behind the one you removed, and build what releases it.	Next roadmap

> **NEVER AUTOMATE A ROLE. DECOMPOSE IT, THEN BUILD THE TASKS THAT QUALIFY.**

[WHY DESIGN COMES FIRST · COST TO FIX ONE MISTAKE]



[11 / INSTALL IT]

INSTALL IT IN 10 MINUTES

Same pattern as our Satellite and Lead Nurture Engine blueprints. Upload the file, type one line, and the weigh-in runs with you. Whichever path you take, everything built belongs to your company.

STEP 01
UPLOAD THIS FILE
To Claude, ChatGPT, or Cursor.

STEP 02
PASTE THE PROMPT
The one below. Nothing else needed.

STEP 03
ANSWER HONESTLY
Score how it runs this week.

[INSTALLER PROMPT]

```
Run THE SCALE weigh-in with me. Go one function at a time, F1 to F5. Read me the five statements, ask which one is true today, and record my score. Then give me my total, my phase, and my constraint. Finish with a one-page Design brief for fixing that constraint using the Machine Method.
```

[THE CROSSROAD · TWO WAYS TO RUN THE MACHINE METHOD]

	PATH A · YOU BUILD IT	PATH B · SOLTECA BUILDS IT
DESIGN	Your team maps it and writes the spec	We map it with your team. You approve it in writing.
BUILD	You find and manage the builders	Built on our architecture, in dependency order
TEST	You test what you have time for	Every path, including failure paths
LAUNCH	You train the team on a new tool	Role-based training and written SOPs
OPTIMIZE	When someone remembers	A weekly call to read the numbers
SCALE	Start again on the next constraint	Next roadmap, ready to build

[12 / THE NEXT STEP]

BRING US YOUR NUMBER

You stepped on the scale. You have a phase and a constraint. The fastest way to move up a phase is to have someone who has built this many times read the number with you.

[THE WEIGH-IN REVIEW]

01 WE READ YOUR SCORE
Function by function, with the reasoning behind each number.

02 WE CONFIRM THE CONSTRAINT
Sometimes the lowest score hides a deeper one. We check before anything is built.

03 WE MAP THE FIRST BUILD
The Design phase for your constraint, scoped in plain language.

[WHAT A BUILD INCLUDES]

+ A 30-day build-out window
+ An owned CRM spine across all five functions
+ Sub-5-minute speed-to-lead, day or night
+ Full ownership of everything we build

BOOK YOUR WEIGH-IN REVIEW

Bring your scorecard from sheet 10. Every month at the same phase is another month under the same ceiling.

SOLTECA.IO/LAUNCH →

8 YEARS · 32 BUSINESSES · 25 INDUSTRIES · 3 CONTINENTS



WE BUILD GROWTH ENGINES.

Companies can't exit on rented infrastructure. Everything we build becomes an owned asset on your balance sheet, with full IP transfer.

DREAM IT. BUILD IT. SCALE IT.