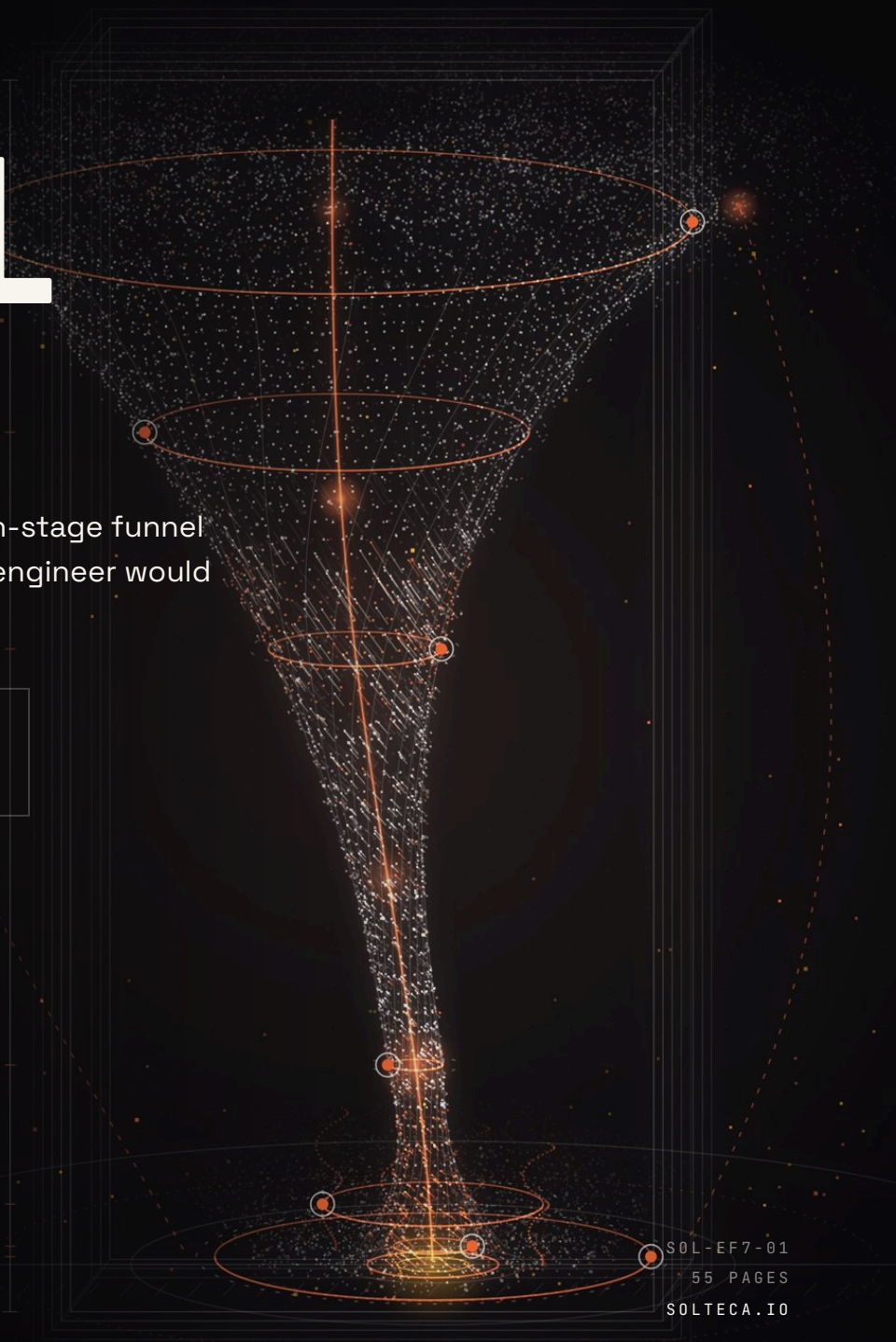
[ENGINEERING BLUEPRINT / EDITION 01 / 2026]

THE EF7 FUNNEL BLUEPRINT

How to build, repair, and spin a seven-stage funnel that feeds itself. Drawn the way an engineer would hand it to you.

07	21	06
STAGES	LEAKS	PHASES



FOR SERVICE OPERATORS BETWEEN $1M AND $50M

DREAM IT. BUILD IT. SCALE IT.

SOL-EF7-01
55 PAGES
SOLTECA.IO

[00 / DOCUMENT CONTROL]

ABOUT THIS DOCUMENT

Owners are told to get more leads. Very few are shown where the leads they already paid for go. This blueprint answers three questions: what a funnel is, where yours is leaking, and how to engineer it into a vortex that feeds its own top.

[WRITTEN FOR]

Owners and operators of service companies doing $1M to $50M a year. It also works for the owner who has never drawn a funnel at all and wants to start right the first time.

[READING LEVEL]

Plain on purpose. Every figure carries an "In plain terms" note. A reader who only looks at the diagrams still walks away with the whole argument.

[WHAT IT CONTAINS]

The EF7 model, the 21 leaks, the economics of the bottom half, a stage-by-stage build, a scored leak audit, a leak cost calculator, a 30-day repair plan, and the Six-Phase Machine Method.

[WHAT IT ASKS OF YOU]

About ninety minutes, your last twelve months of numbers, and honesty on the audit. Every system in here can be built on tools a company already pays for.

DOCUMENT	The EF7 Funnel Blueprint	SOL-EF7-01
COMPANION FIGURE	EF7_FUNNEL animated vortex	FIG 01
SIBLING BLUEPRINTS	The Satellite Blueprint · LN9 Lead Nurture Engine · C5_GROWTH_ENGINE	SERIES
EDITION	01 · 2026	55 PP
AUTHORITY	SOLTECA · Revenue Infrastructure Company	SOLTECA.IO

[IN PLAIN TERMS]

A funnel is the path a stranger walks to become a client and then a source of new clients. This document shows you that path, the holes in it, and how to seal them with systems that keep running when you step away.

[00.1 / CONTENTS]

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[00.2 / START HERE]

PICK YOUR PATH. THE BLUEPRINT MEETS YOU THERE.

Every reader arrives in one of three places. Find yours, read Part I and Part II for context, then go straight to the pages built for you.

A

NO FUNNEL YET

"WE RUN ON WORD OF MOUTH."

You have clients and a reputation, and new business arrives when it feels like it. You need a path a stranger can walk without you standing at every step.

YOUR ROUTE

- Part I · the model (p.06)
- Part IV · build stages in order (p.32)
- p.41 · the owned spine
- p.46 · the 30-day plan

B

IT LEAKS

"LEADS COME IN. SALES DON'T MATCH."

You spend on marketing, the phone rings, and revenue still feels random. Somewhere between the first click and the fifth referral, money is falling out.

YOUR ROUTE

- Part II · the 21 leaks (p.17)
- p.42 · run the audit
- p.44 · price each leak
- p.45 · fix the biggest one first

C

BUILD IT FOR ME

"I KNOW WHAT IT NEEDS. NO TIME."

You can see the vortex and you would rather run the company than wire the machine. You want an engineering partner who designs, builds, and keeps it spinning.

YOUR ROUTE

- p.26 · the half nobody builds
- p.48 · the master builder
- p.50 · Six-Phase Machine Method
- p.52 · ROI and the engagement

[IN PLAIN TERMS]

Read the paths as a sequence rather than a menu. Owners who build it themselves often hire a builder for phase two, and the audit on p.42 is useful to all three.

[00.3 / THE BLUEPRINT ON ONE PAGE]

IF YOU ONLY READ ONE PAGE

01 A FUNNEL HAS TWO HALVES

The top half turns strangers into clients: Awareness, Attract, Nurture, Convert. The bottom half turns clients into more clients: Retain, Ascend, Flywheel. The drawing on the whiteboard stops at the sale, so the second half rarely gets built.

02 MORE LEADS INTO A LEAK IS MORE LEAKAGE

Every stage leaks. Buying more traffic multiplies the loss along with the gain. The cheapest revenue in the company is the revenue already falling out of the funnel you have.

03 THE BOTTOM HALF CREATES THE VACUUM

Retention, ascension, and referral systems pull new leads into the top at close to zero acquisition cost. Each rotation adds reviews, referrals, and search presence, so the next rotation spins faster and wider.

04 FIX ONE CONSTRAINT AT A TIME

Score the seven stages, price each leak in dollars, and repair the most expensive one first. When it is fixed, the constraint moves. That relocation is the method working.

05 INFRASTRUCTURE OUTWORKS EFFORT

A manual funnel depends on someone remembering. An engineered one runs on an owned spine: one customer record, automated response, scheduled asks, live dashboards. You can build it yourself with this blueprint or have a master builder build it with you.

5–25×

COST TO ACQUIRE A NEW CLIENT VS KEEP ONE · HBR

25–95%

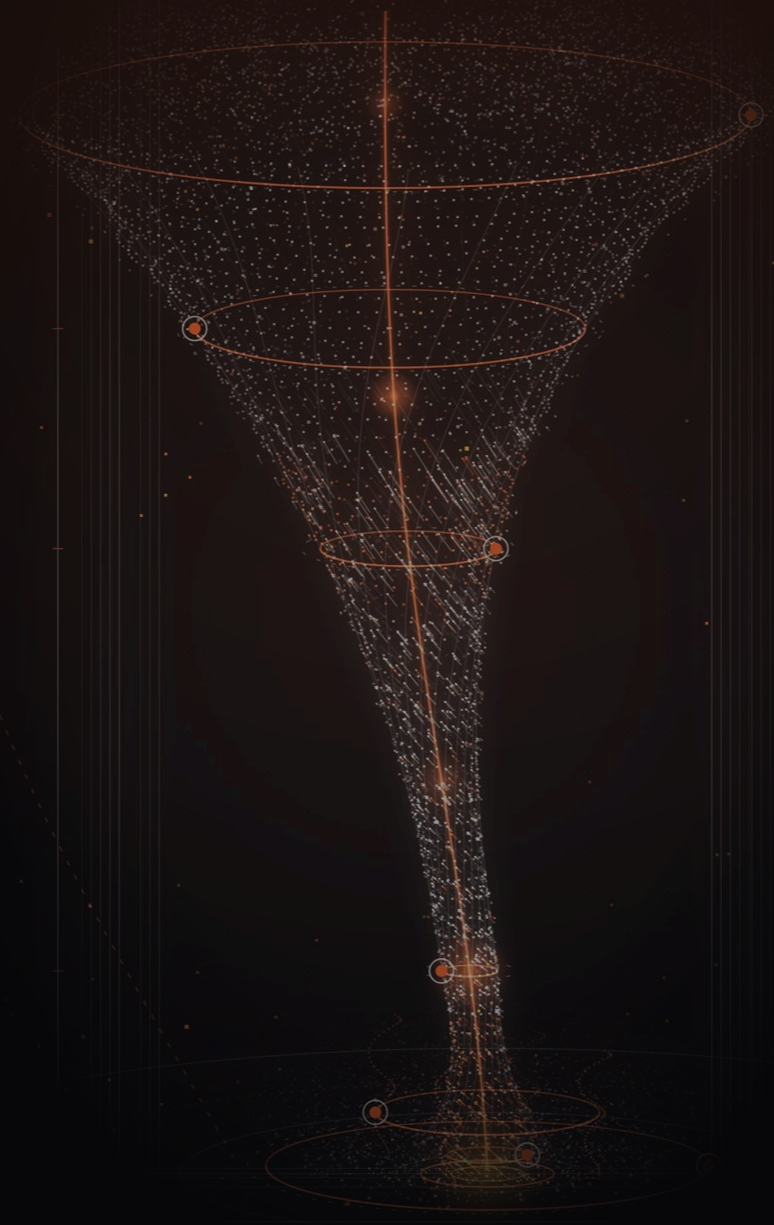
PROFIT LIFT FROM A 5-POINT RETENTION GAIN · BAIN

7×

QUALIFICATION ODDS WHEN LEADS GET A REPLY INSIDE ONE HOUR · HBR

Sources: Gallo, "The Value of Keeping the Right Customers," HBR, 2014 · Reichheld, Bain & Company · Oldroyd, McElheran & Elkington, "The Short Life of Online Sales Leads," HBR, 2011.

I



[PART I]

WHAT A FUNNEL IS

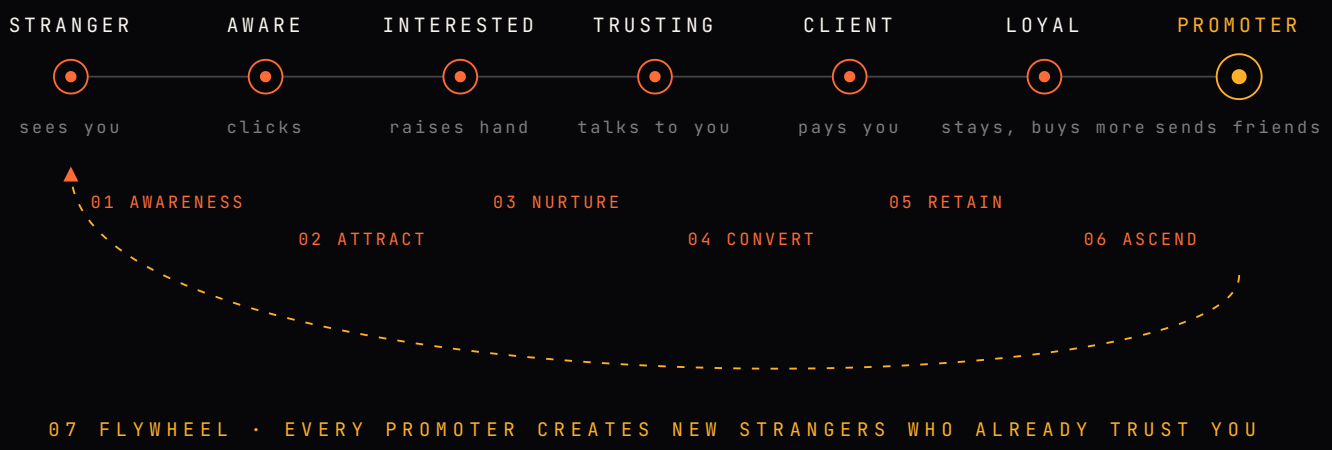
The old drawing, the new one, and why the only funnel in nature that runs itself is a storm.

01 · DINNER TABLE 02 · OLD VS NEW 03 · FIVE LAWS 04 · SEVEN STAGES

[01 / THE PLAIN DEFINITION]

A FUNNEL, EXPLAINED AT THE DINNER TABLE

A funnel is the path a person walks from never having heard of you to sending you their friends. Every business has one. Some are designed. The rest happen by accident and leak at every step.



THE TOP HALF · STRANGER TO CLIENT

Four stages turn attention into revenue. Someone notices you, raises a hand, gets enough of the right information to trust you, and buys. This is the half every marketing course teaches.

THE BOTTOM HALF · CLIENT TO PROMOTER

Three stages turn a client into a growth engine. They get a great result, buy again and buy more, then send people who arrive pre-sold. This is the half the whiteboard leaves off.

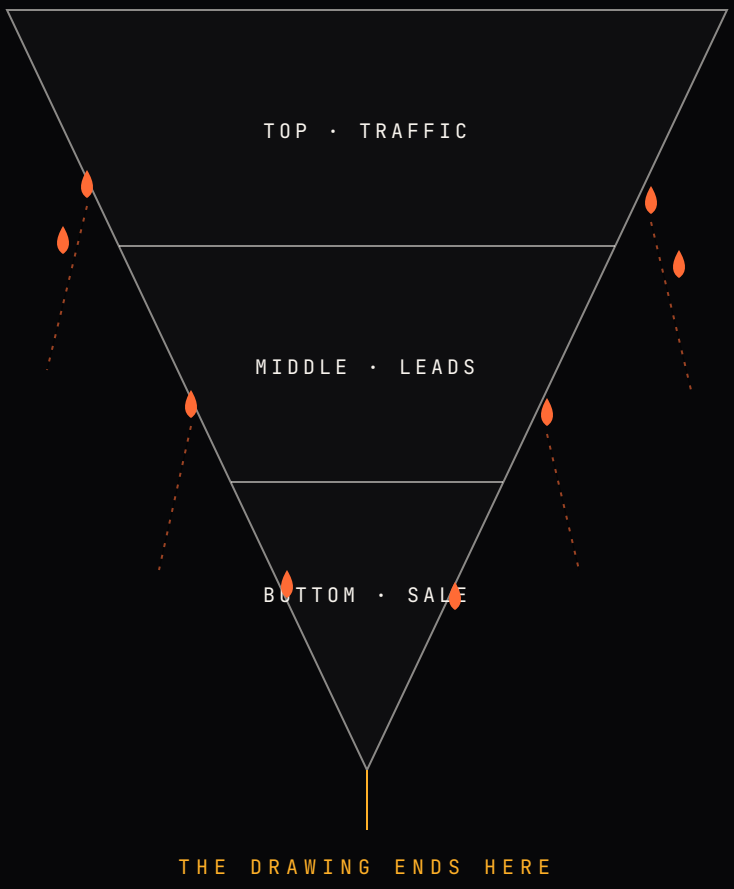
[IN PLAIN TERMS]

If you have ever said "most of our business comes from referrals," you already have a bottom half. It just runs on luck. This blueprint shows you how to run it on purpose.

[02 / THE OLD WAY]

THE FLAT TRIANGLE

The funnel many owners were taught is a static triangle: wide at the top, a point at the bottom, and a sale where the drawing ends. Nothing in it moves, nothing comes back out, and every gap is invisible.



WHAT THE TRIANGLE ASSUMES

- Growth comes from widening the top
- The sale is the finish line
- Clients are revenue, never a source of leads
- Leaks are a cost of doing business
- A person can carry each lead by hand

WHAT IT HIDES

The triangle has no place to draw a slow reply, a missed follow-up, a client who never got onboarded, or a referral nobody asked for. If a picture has no place for a problem, nobody fixes it.

THE DEFAULT FIX

When revenue stalls, the triangle points to one answer: buy more traffic. Spend rises, the same holes drain it, and the owner concludes that marketing "doesn't work" in their industry.

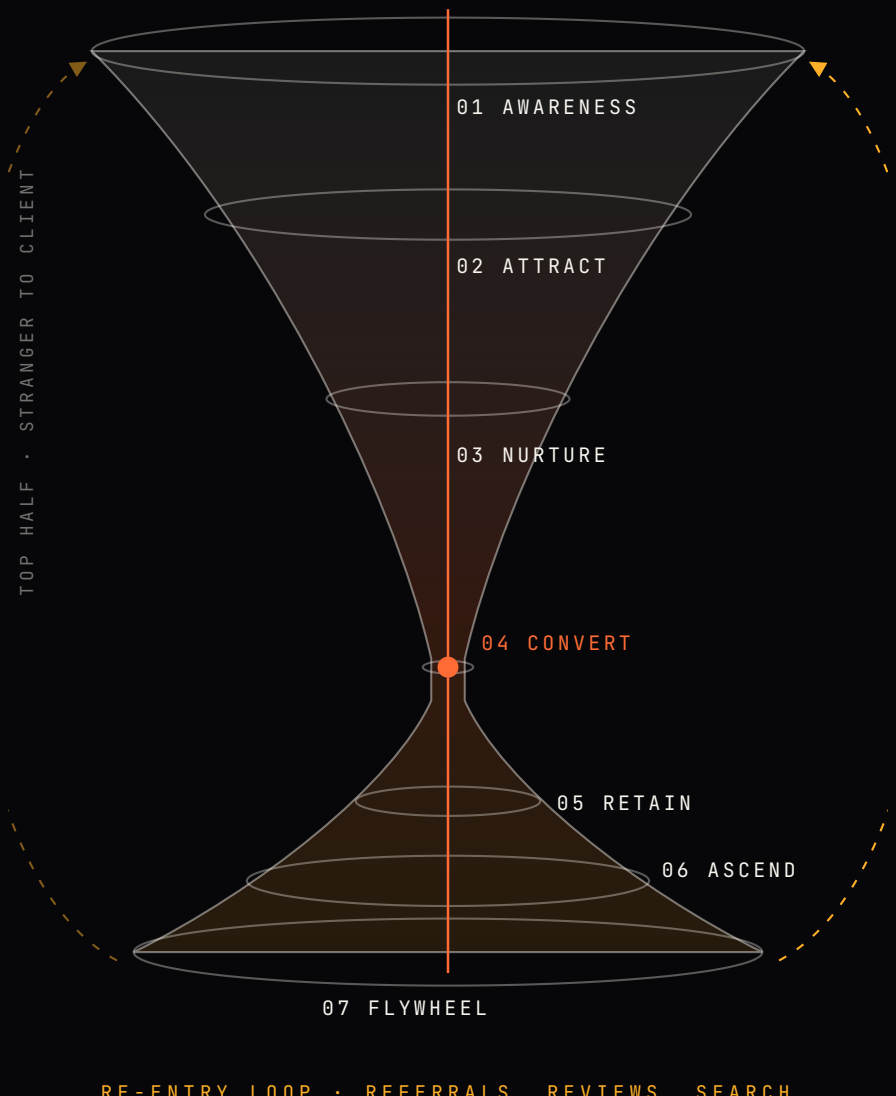
[IN PLAIN TERMS]

The old funnel is a picture of a pipe. Pipes leak, and they only carry what you pour into them. A modern funnel has to behave like a machine that refills itself.

[02.1 / THE NEW WAY]

THE VORTEX

The EF7 funnel narrows from Awareness to the sale, then widens again through Retain, Ascend, and Flywheel. The bottom half throws new, pre-sold leads back into the top. It rotates, and every rotation makes it stronger.



WHAT THE VORTEX ASSUMES

- Growth comes from rotation as much as width
- The sale is the narrowest point, halfway down
- Every client is a future lead source
- Every leak can be named, priced, and sealed
- Systems carry each lead; people handle judgment

THE BOW-TIE

Large B2B revenue teams draw the same shape and call it the bow-tie: acquisition narrows to the commitment, then onboarding, adoption, and expansion widen it back out. The EF7 is that model, engineered for a service business.

THE PHYSICS

A tornado spins faster as it narrows. A funnel should too. The closer a lead gets to a decision, the faster and more personal the response has to be.

[02.2 / SIDE BY SIDE]

OLD WAY · NEW WAY

Twelve differences between a funnel someone drew and a funnel someone engineered. Read across each row and mark which column describes your company today.

DIMENSION	THE FLAT TRIANGLE	THE EF7 VORTEX
SHAPE	Narrows to a sale and stops	Narrows to a sale, widens through delivery, loops back to the top
GROWTH LEVER	More traffic	Sealed leaks, then rotation, then traffic
FIRST RESPONSE	When someone gets to it	Under five minutes, automated, every time
FOLLOW-UP	One call, one email, then silence	Ten or more touches across channels until a yes or a clear no
FRONT DOOR	"Book a call" for everyone	A lead magnet for the many, a direct offer for the ready few
SALES	Each rep improvises	A scripted, measured process with no-show recovery
AFTER THE SALE	Handed off by email, if at all	Onboarding sequence, health checks, time-to-value tracking
EXPANSION	Upsells when someone remembers	A designed next offer, triggered at the right milestone
REFERRALS	Hoped for	Asked at two set moments, tracked, rewarded
REVIEWS	Occasional, uneven	Requested after every delivery, routed to the right platform
DATA	Spread across inboxes, sheets, and memory	One owned customer record that every system writes to
WHEN YOU LEAVE	It stops	It keeps spinning

[IN PLAIN TERMS]

Count your marks in the right-hand column. Four or fewer means the funnel depends on people remembering. Nine or more means you are ready to tune the machine rather than build it.

[03 / WHY A TORNADO]

FIVE LAWS OF THE STORM

A tornado pulls fuel in from miles away, organizes it into one rotation, tightens, touches ground, and throws debris back into its own inflow. Each of those behaviors is a law a revenue funnel can be engineered to follow.

01 INFLOW

NO WARM AIR, NO STORM

Cut the fuel and the rotation decays within minutes. **A funnel with no fresh traffic is a pipeline already dying.** The volume floor is a set number of outreach, content, and ad actions every day.

02 ANGULAR MOMENTUM

$\omega \propto 1/r$ · NARROWER SPINS FASTER

As the column tightens, rotation speeds up, the same way a skater spins faster with arms pulled in. **The closer a lead is to buying, the faster your response must be.** Minutes at the inquiry, hours at the proposal.

03 GROUND CONTACT

ONLY TOUCHDOWN COUNTS

A funnel cloud that never touches the ground is weather. Meteorologists do not record it. **Pipeline that never closes is a forecast.** Revenue is the only touchdown, so the system is measured at the signature.

04 OCCLUSION

CUT THE INFLOW, ROPE OUT

When cold downdraft wraps fully around the core, warm inflow is cut off. The tornado thins into a rope and dies. **When follow-up stops and new leads stop, the pipeline ropes out**, and on the P&L it shows up as a slow quarter.

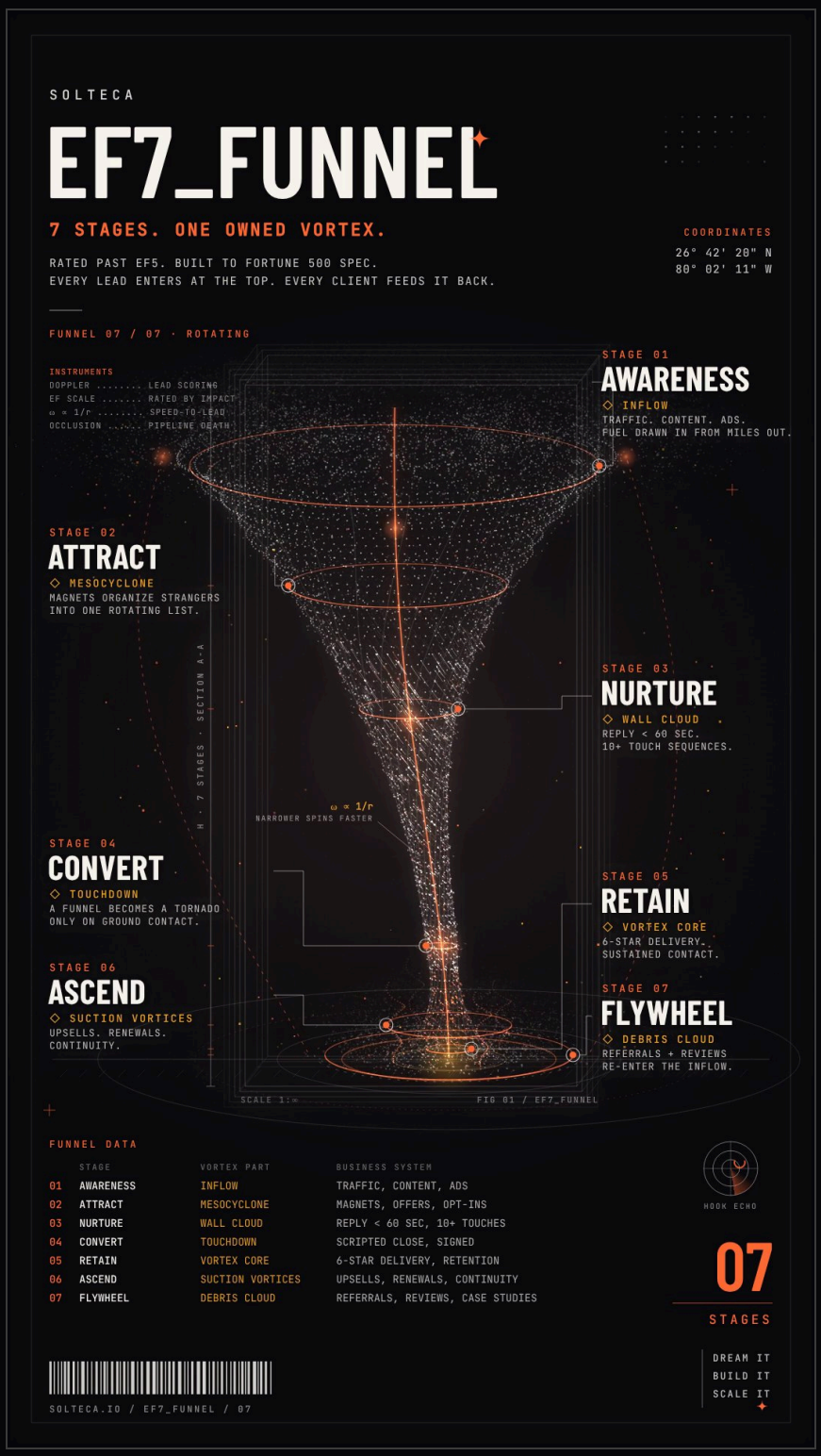
05 RECIRCULATION

DEBRIS RE-ENTERS THE VORTEX

Material lofted from the ground is pulled back up through the column. **Every client you deliver for feeds the top again** through referrals, reviews, and search. A flywheel is a funnel that loops.

Storm anatomy: NWS Skywarn Spotter Guide · Tornadogenesis literature (rear-flank downdraft, vortex stretching). EF scale: Enhanced Fujita, the US standard for rating tornado strength by damage done.

[FIG 01 / THE ANATOMY]



SEVEN STAGES. ONE OWNED VORTEX.

The figure is the full EF7 drawn as an engineering plate. Each ring marks a stage. The orange core is a single lead traveling the column. The drop at the narrowest point is the sale, the moment of ground contact.

Below touchdown the debris cloud widens. That is the bottom half: delivery, expansion, and the referrals that ride the dashed loops back to the inflow at the top.

WHY "EF7"

The Enhanced Fujita scale stops at EF5, the strongest tornado class on record. EF7 goes two past the ceiling: one rating for each stage of a funnel engineered to feed itself.

READ IT LIKE AN ENGINEER

RINGS	Stage boundaries, measured
CORE	The path of one lead
DROP	Touchdown · the closed sale
DEBRIS	Delivery and expansion
LOOPS	Referral re-entry to the top
ω ∝ 1/r	Speed rises as the funnel narrows

[IN PLAIN TERMS]

Wide at the top, fast at the neck, wide again at the bottom, and connected end to end.

[04 / THE SPECIFICATION]

THE SEVEN STAGES

The complete map. Each stage has a job, a storm equivalent, a system that runs it, and a number that tells you whether it works.

#	STAGE	VORTEX PART	JOB	OWNED SYSTEM	CORE METRIC
01	**AWARENESS**	Inflow	Put the right offer in front of the right strangers, every day	Content and ad engine, outreach cadence	Reach · cost per lead
02	**ATTRACT**	Mesocyclone	Turn attention into a known contact with a lead magnet	Capture pages, magnets, CRM intake	Opt-in rate
03	**NURTURE**	Wall cloud	Answer fast, follow up long, move interest toward a decision	Speed-to-lead automation, sequences	Response time · booked rate
04	**CONVERT**	Touchdown	Run a repeatable sales process that ends in a signature	Pipeline, scripts, no-show recovery	Show rate · close rate
05	**RETAIN**	Vortex core	Deliver the promised result fast and keep the client	Onboarding flows, health checks	Time-to-value · retention
06	**ASCEND**	Suction vortices	Offer the next right thing at the right moment	Offer ladder, renewal triggers	Revenue per client
07	**FLYWHEEL**	Debris cloud	Turn results into referrals, reviews, and searchable proof	Review and referral engines	Referral rate · review velocity

HOW IT MAPS TO C5_GROWTH_ENGINE

Lead Generation covers Stages 01 and 02. Lead Nurture is Stage 03. Conversion is Stage 04. Fulfillment is Stage 05. Ascension spans Stages 06 and 07. The EF7 splits the bottom half so it gets the attention it has always deserved.

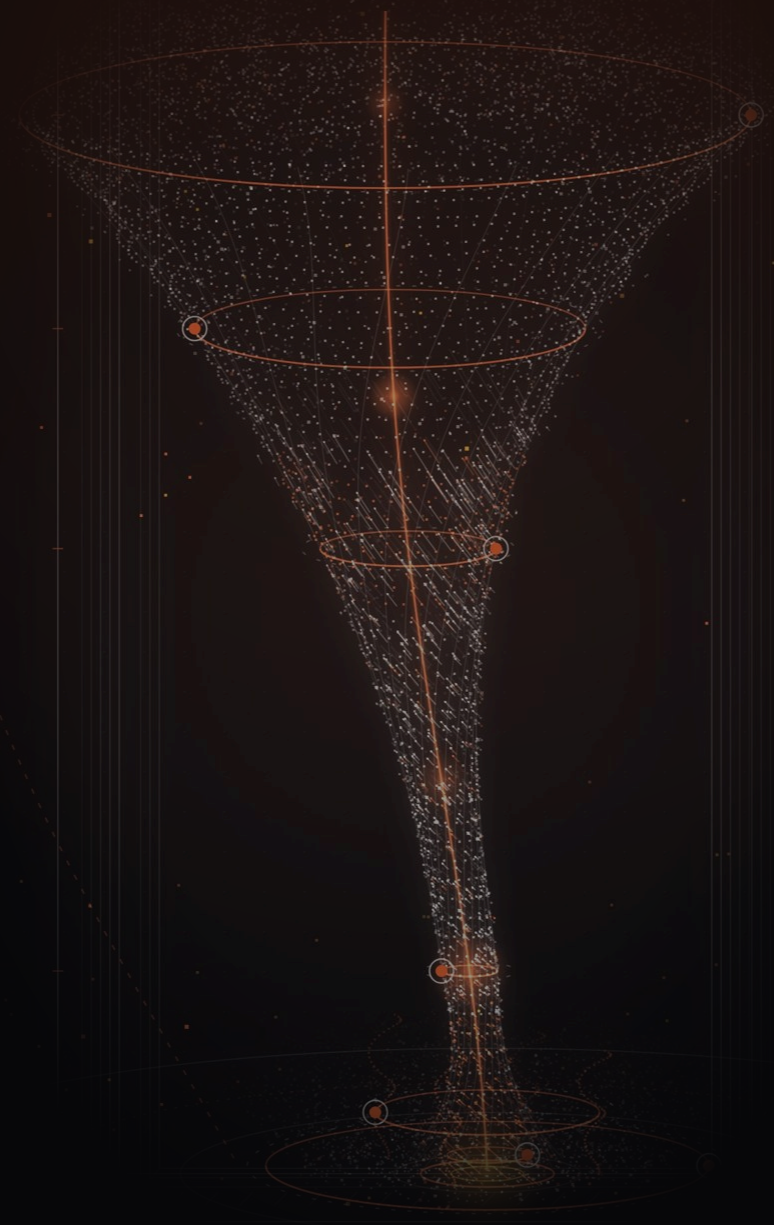
HOW IT MAPS TO A SALES CYCLE

A standard nine-step sales cycle runs from prospecting to referrals and skips delivery entirely. The EF7 fills that gap with Retain and Ascend, the two stages where client lifetime value is decided.

[IN PLAIN TERMS]

Seven stages, each with one job and one number. If you cannot name the number for a stage, that stage is running on hope.

II



[PART II]

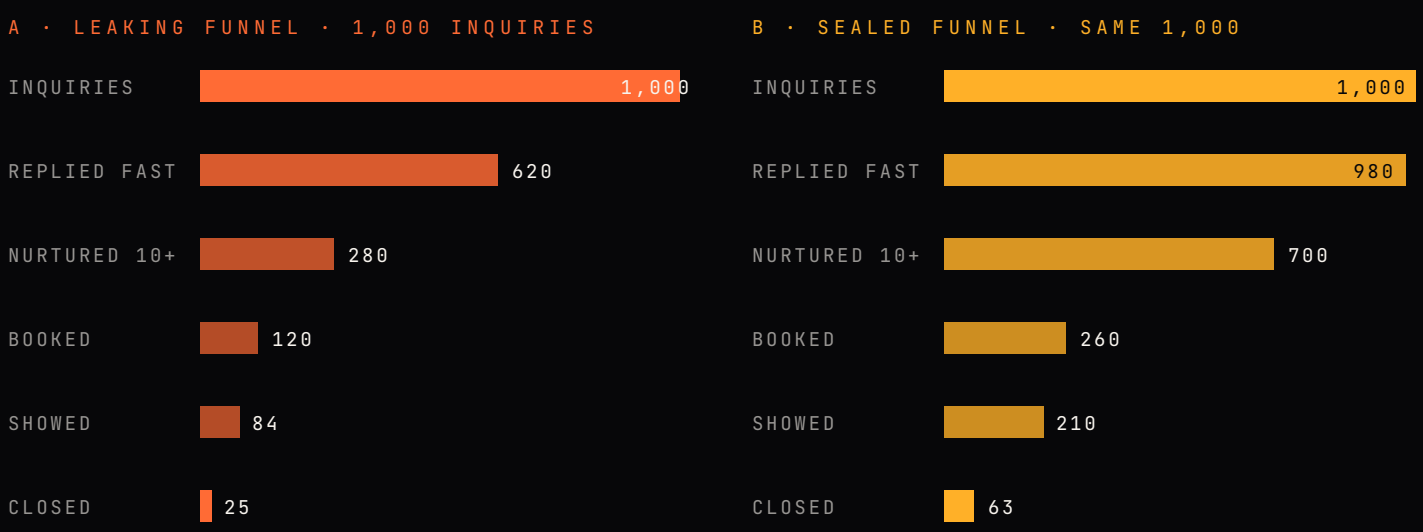
THE PAIN CYCLE

How funnels break, what the breaks cost, and why buying more leads makes a leaking funnel lose money faster.

[05 / THE MORE-LEADS TRAP]

POURING WATER INTO A SIEVE

When revenue stalls, the reflex is to buy more leads. Run the numbers through a funnel that leaks and you see the problem: doubling the input doubles the loss, and the cost per client barely moves.



A doubled: 2,000 inquiries → 50 clients at twice the spend

B unchanged: 1,000 inquiries → 63 clients at the original spend

ILLUSTRATIVE MODEL · STAGE RATES SHOWN FOR CLARITY · RUN YOUR OWN ON P.44

2.5×
CLIENTS FROM THE SAME LEADS ONCE THE FUNNEL IS SEALED

−60%
COST PER CLIENT IN MODEL B VS MODEL A

$0
NEW AD SPEND REQUIRED TO GET THERE

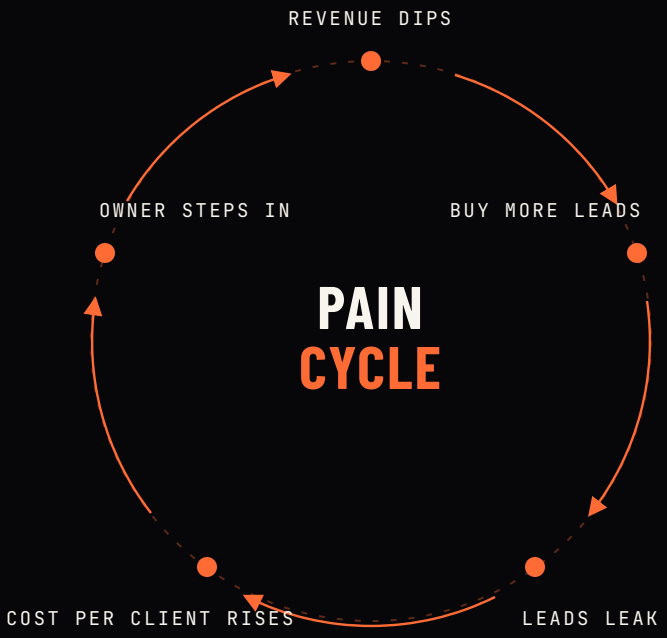
[IN PLAIN TERMS]

Fix the bucket before you turn up the tap. Every lead you already pay for is worth more in a sealed funnel than two leads in a leaking one.

[05.1 / THE LOOP THAT KEEPS OWNERS STUCK]

THE PAIN CYCLE

A leaking funnel produces a predictable sequence. Each step feels like a reasonable response to the last one, which is why owners can run the same loop for years.



01 **Revenue dips.** A slow month, a lost referral partner, an ad account that cools off.

02 **Buy more leads.** New agency, bigger budget, a new platform.

03 **Leads leak.** Slow replies, short follow-up, no-shows nobody rebooks.

04 **Cost per client rises.** The new spend lands in the same holes.

05 **Owner steps in.** Discounts to close, works nights, delivery slips, referrals dry up. Revenue dips again.

SIGNS YOU ARE IN THE LOOP

- [ ] You have changed agencies or ad platforms twice in two years
- [ ] Good months follow months you personally sold
- [ ] You discount to hit the number at month end
- [ ] Nobody can tell you last month's close rate

THE WAY OUT

The loop breaks at step three. Seal the leaks first, and the next dollar of spend produces a client instead of a cost. Then build the bottom half so step one stops happening at all.

Part III shows the vacuum that replaces the loop. Part V shows where to start.

[FIG 02 / THE LEAK MAP]

TWENTY-ONE LEAKS. THREE PER STAGE.

Every stage of the vortex has three common failure points. Each leak has a number you will see again in the audit, the calculator, and the build pages.

01 AWARENESS	L01 ONE-CHANNEL DEPENDENCY	L02 A MESSAGE FOR EVERYONE	L03 RENTED REACH ONLY
02 ATTRACT	L04 BOOK-A-CALL IS THE ONLY DOOR	L05 FORMS THAT DEAD-END	L06 A MAGNET WITH NO NEXT STEP
03 NURTURE	L07 SLOW FIRST RESPONSE	L08 FOLLOW-UP THAT QUITS	L09 THE DORMANT DATABASE
04 CONVERT	L10 IMPROVISED SALES CALLS	L11 NO-SHOWS NEVER REBOOKED	L12 PROPOSALS THAT SIT
TOUCHDOWN · ABOVE: STRANGER TO CLIENT · BELOW: CLIENT TO PROMOTER			
05 RETAIN	L13 THE HANDOFF GAP	L14 SLOW TIME TO VALUE	L15 SILENT CHURN
06 ASCEND	L16 NO NEXT OFFER	L17 RENEWALS LEFT TO MEMORY	L18 ASKS AT THE WRONG TIME
07 FLYWHEEL	L19 NO REVIEW SYSTEM	L20 REFERRALS BY CHANCE	L21 INVISIBLE WINS

[IN PLAIN TERMS]

The twelve orange leaks get the attention. The nine gold leaks below the line are where lifetime value and referrals are lost, and very few companies measure them at all.

[06 / LEAKS 01 – 06 · AWARENESS AND ATTRACT]

WHERE STRANGERS SLIP AWAY

L01 · ONE-CHANNEL DEPENDENCY

All new business comes from one source: a referral partner, one ad account, one platform. One algorithm change or one lost relationship cuts the pipeline in half overnight.

FIX → p.33 · two owned channels minimum

L02 · A MESSAGE FOR EVERYONE

The website and ads describe the company instead of the buyer's problem. The wrong people inquire, the right people scroll past, and sales time goes to poor-fit calls.

FIX → p.33 · one avatar, one problem

L03 · RENTED REACH ONLY

Every follower and every past visitor lives on someone else's platform. To reach them again you pay again. Without an owned list, each month starts from zero.

FIX → p.34 · capture to your own record

L04 · BOOK-A-CALL IS THE ONLY DOOR

The only path forward is a high-commitment ask. It converts the small share of visitors ready to buy today. Everyone still researching leaves and rarely returns.

FIX → p.40 · add a lead magnet door

L05 · FORMS THAT DEAD-END

A form drops into an inbox. There is no instant confirmation, no CRM record, no alert. By the time someone sees it, the prospect has called a competitor.

FIX → p.34 · instant capture and routing

L06 · A MAGNET WITH NO NEXT STEP

A generic "free guide" that solves nothing specific and points nowhere. It collects emails and produces no pipeline, which convinces owners that lead magnets do not work.

FIX → p.40 · solve one problem, reveal the next

1–3%

COLD VISITORS READY TO BOOK TODAY · SOLTECA LEAD MAGNET BLUEPRINT

5–10×

LEAD FLOW WHEN OPT-IN RISES FROM 1% TO 5–10% ON THE SAME TRAFFIC

20%+

OPT-IN TARGET FOR A WELL-NAMED MAGNET

[IN PLAIN TERMS]

The top of the funnel rarely lacks traffic. It lacks a second door for the people who are interested and not yet ready.

[06.1 / LEAKS 07 – 12 · NURTURE AND CONVERT]

WHERE INTEREST GOES COLD

L07 · SLOW FIRST RESPONSE

Hours or days pass before a reply. Firms that respond inside an hour are about seven times as likely to qualify the lead, and the average response in the same study was 42 hours.

HBR, "The Short Life of Online Sales Leads," 2011

L08 · FOLLOW-UP THAT QUITS

One call and one email, then silence. Connecting with a prospect takes an average of 18 call attempts, and the fourth sales email still draws a 14% response rate.

Gartner; Yesware study of 500,000 emails · via Pipedrive

L09 · THE DORMANT DATABASE

Hundreds or thousands of past inquiries sit untouched. Each one was paid for. A single reactivation campaign often produces booked calls within days, at no media cost.

FIX → p.35 · reactivation sequence

L10 · IMPROVISED SALES CALLS

Every rep runs a different conversation. Close rate depends on who answered the phone that day, and nobody can coach what nobody has written down.

FIX → p.36 · scripted, scored process

L11 · NO-SHOWS NEVER REBOOKED

A booked call that does not happen is treated as a lost lead. The prospect was interested enough to book. Without reminders and a rebook sequence, that interest evaporates.

FIX → p.36 · reminders and recovery

L12 · PROPOSALS THAT SIT

The quote goes out and the follow-up never comes. The deal is not lost to a competitor. It dies of neglect while the buyer waits for someone to make it easy to say yes.

FIX → p.36 · post-proposal cadence

THE NARROWEST POINT

This is the neck of the vortex, where Law 02 applies hardest. Interest is highest and patience is lowest. Minutes matter at the inquiry and hours matter at the proposal. A funnel that slows down here throws away the most expensive leads it has.

[IN PLAIN TERMS]

In a leaking funnel, deals usually die of silence. The fix is a system that never forgets to call back.

[06.2 / LEAKS 13 – 21 · RETAIN, ASCEND, FLYWHEEL]

WHERE CLIENTS STOP COMPOUNDING

These nine leaks rarely appear on a dashboard. Their cost shows up as clients who quietly leave, never buy twice, and never mention you to anyone.

L13 · THE HANDOFF GAP

The client repeats everything to the delivery team. Promises made in sales never reach the people keeping them.

L14 · SLOW TIME TO VALUE

No onboarding path. The first result arrives late and buyer's remorse fills the silence.

L15 · SILENT CHURN

No health checks. You learn a client was unhappy on the day they cancel.

L16 · NO NEXT OFFER

Nothing is designed for a client to buy after the first purchase, so they buy it elsewhere.

L17 · RENEWALS LEFT TO MEMORY

Contracts and maintenance plans lapse because nobody tracked the date.

L18 · ASKS AT THE WRONG TIME

The upsell lands before the result, or never lands at all.

L19 · NO REVIEW SYSTEM

Reviews depend on clients volunteering. Happy clients rarely do; unhappy ones always do.

L20 · REFERRALS BY CHANCE

No ask, no tracking, no thank-you. Referrals happen in spite of the system.

L21 · INVISIBLE WINS

Results never become case studies, content, or search presence. The proof stays private.

60–70%

ODDS OF SELLING TO AN EXISTING CLIENT, VS 5–20% FOR A NEW PROSPECT · MARKETING METRICS

16%

HIGHER LIFETIME VALUE OF REFERRED CUSTOMERS · JOURNAL OF MARKETING, 2011

92%

OF CONSUMERS TRUST RECOMMENDATIONS FROM PEOPLE THEY KNOW · NIELSEN

[IN PLAIN TERMS]

Below the line, the money is already in the building. These leaks cost more than the top-half leaks and take less to fix.

[07 / THE REVENUE YOU NEVER SAW]

A $3M COMPANY, LEAK BY LEAK

A worked ledger for a model service company: $3M a year, 3,000 inquiries, 375 new clients, $8,000 average client value. Seven leaks priced with conservative recovery rates.

LEAK	WHAT HAPPENS	ASSUMPTION	ANNUAL COST
L07	Slow first response	30% of inquiries answered after an hour; half their conversion lost	$450,000
L08	Follow-up quits at two touches	40% of leads get two touches or fewer; longer follow-up converts 3% of them	$288,000
L11	No-shows never rebooked	120 no-shows a year; 40% rebook; 40% of those close	$154,000
L12	Proposals that sit	60 quiet proposals a year; 20% recovered with a cadence	$96,000
L15	Silent churn	20 avoidable losses a year at $8,000 each	$160,000
L16	No next offer	15% of clients would buy a $3,000 follow-on service	$169,000
L20	Referrals by chance	Referral rate rises from 5% to 15% of clients	$300,000
	TOTAL LEAKAGE	Seven of twenty-one leaks, before reviews, search, or reactivation	**$1.62M**

$1.6 MILLION A YEAR WALKING OUT OF A $3 MILLION COMPANY.

The model is deliberately conservative: low recovery rates, no compounding, and fourteen leaks left unpriced. In this model, 39% of the lost revenue sits in the bottom half, the part of the funnel that never appears in an ad report.

ILLUSTRATIVE MODEL · NOT A CLIENT RESULT · YOUR OWN LEDGER STARTS ON P.44

[07.1 / THE DAMAGE CHAIN]

WHAT A LEAKING FUNNEL DESTROYS

Lost revenue is the first cost and the smallest one. A funnel that leaks long enough starts consuming the parts of the company that took years to build.

01	CASH	Acquisition cost climbs as spend lands in the same holes. Margin shrinks to fund the next campaign, and the business borrows from next quarter to pay for this one.	FIRST SIGN · CAC up, close rate flat
02	TEAM	Salespeople chase leads that went cold before they were assigned. Delivery staff inherit clients nobody onboarded. Good people leave a company that feels chaotic.	FIRST SIGN · rep turnover, blame
03	FOUNDER	The owner becomes the follow-up system, the closer, and the escalation desk. Sixty-hour weeks become normal and vacations get cancelled, because the funnel stops when the owner does.	FIRST SIGN · you are the CRM
04	REPUTATION	Slow replies and uneven delivery show up in public reviews. Prospects read them before they call. The top of the funnel shrinks because the bottom of it was neglected.	FIRST SIGN · ratings drifting down
05	ENTERPRISE VALUE	Buyers pay for revenue that is predictable and transferable. Revenue that depends on the owner's effort is discounted or walked away from. Companies can't exit on rented infrastructure.	FIRST SIGN · valuation talks stall

[IN PLAIN TERMS]

The leak starts in the funnel and ends in the founder's calendar and the company's sale price. Sealing it protects all five.

[08 / OCCLUSION]

HOW FUNNELS DIE

Tornadoes follow a life cycle: they organize, mature, shrink, and rope out. A funnel without a bottom half follows the same arc. Recognize the stage and you know how much time you have.



01 ORGANIZING 02 MATURE 03 SHRINKING 04 ROPE OUT

STORM STAGE	WHAT THE BUSINESS SEES	WHAT IS HAPPENING
ORGANIZING	A launch push, a new offer, an energetic founder. Leads arrive and get personal attention.	Inflow strong, no system yet
MATURE	Peak months. Referrals and ads both working. The team is stretched and nobody has time to build systems.	Rotation held up by effort
SHRINKING	The owner moves into delivery. Follow-up slips, response times stretch, reviews soften.	Cold downdraft wrapping the core
ROPE OUT	Pipeline thin. Feast and famine. Discounts to close, then a new campaign to restart the storm.	Inflow occluded, vortex decays

THE FEAST-AND-FAMINE LOOP

When the owner sells, delivery suffers. When the owner delivers, selling stops. Revenue swings between the two because one person is running both halves of the funnel.

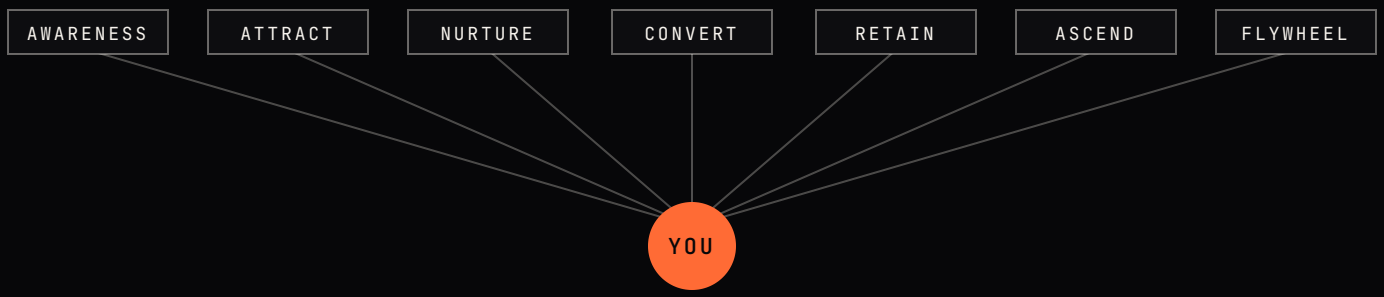
WHAT KEEPS A VORTEX ALIVE

Fresh inflow from two owned channels, follow-up that never stops, and a bottom half that feeds referrals into the top. Systems hold the rotation when people get busy.

[08.1 / FOUNDER DEPENDENCY]

WHEN THE FOUNDER IS THE FUNNEL

In many companies under $10M, every stage of the funnel quietly routes through one person. Fill in the table honestly. Each row with your name in it is a stage that stops when you do.



STAGE	WHO RUNS IT TODAY	WHAT HAPPENS IF YOU ARE AWAY TWO WEEKS
AWARENESS		
ATTRACT		
NURTURE		
CONVERT		
RETAIN		
ASCEND		
FLYWHEEL		

THE HUB TRAP

An owner at the center of every stage becomes the speed limit of the company. Growth adds load to one person until quality slips, and the slip shows up first in the bottom half.

THE BUILDER'S QUESTION

For each row, ask what system would do this if you were gone. The answer is the build list. Part IV shows what that system looks like, stage by stage.

III



[PART III]

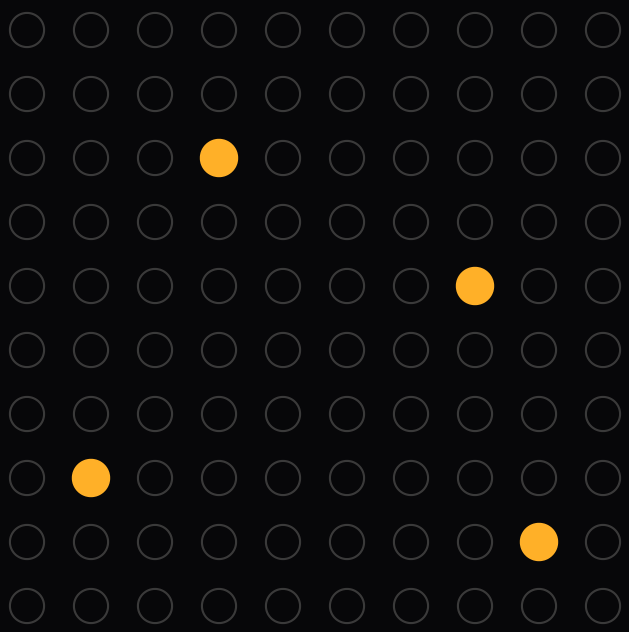
THE BOTTOM HALF

Retain, Ascend, Flywheel. The three stages that turn a funnel into a vacuum, and the reason a few companies grow on referrals while the rest grow on ad spend.

[09 / THE HALF NOBODY BUILDS]

FEWER THAN 1 IN 20

Fewer than one in twenty service businesses run engineered systems in the bottom half of the funnel. The rest leave retention, expansion, and referrals to goodwill and memory, and then wonder why growth costs more every year.



WHY THE BOTTOM HALF GETS SKIPPED

01 **The drawing ends at the sale.** If the funnel on the whiteboard stops at "closed," nobody is assigned what comes after.

02 **Vendors are paid on the top half.** Agencies report clicks, leads, and cost per lead. Nobody bills for referrals.

03 **The payoff is delayed.** A review system pays off over months. A lead campaign pays off this week. Urgent wins.

04 **Delivery is measured on delivery.** Teams are judged on finishing the work, never on what the client does next.

05 **It feels awkward.** Asking for reviews and referrals feels like begging until a system makes the ask routine.

3
STAGES BELOW THE LINE: RETAIN, ASCEND, FLYWHEEL

9
OF THE 21 LEAKS LIVE IN THE BOTTOM HALF

10
ORGANIC INFLOWS IT OPENS (P.30)

THE OPPORTUNITY HIDDEN IN THAT NUMBER

If nineteen of twenty competitors ignore the bottom half, the company that builds it competes on a different cost curve. It acquires clients through referrals and reputation that rivals have to buy with ad spend, and it keeps them longer.

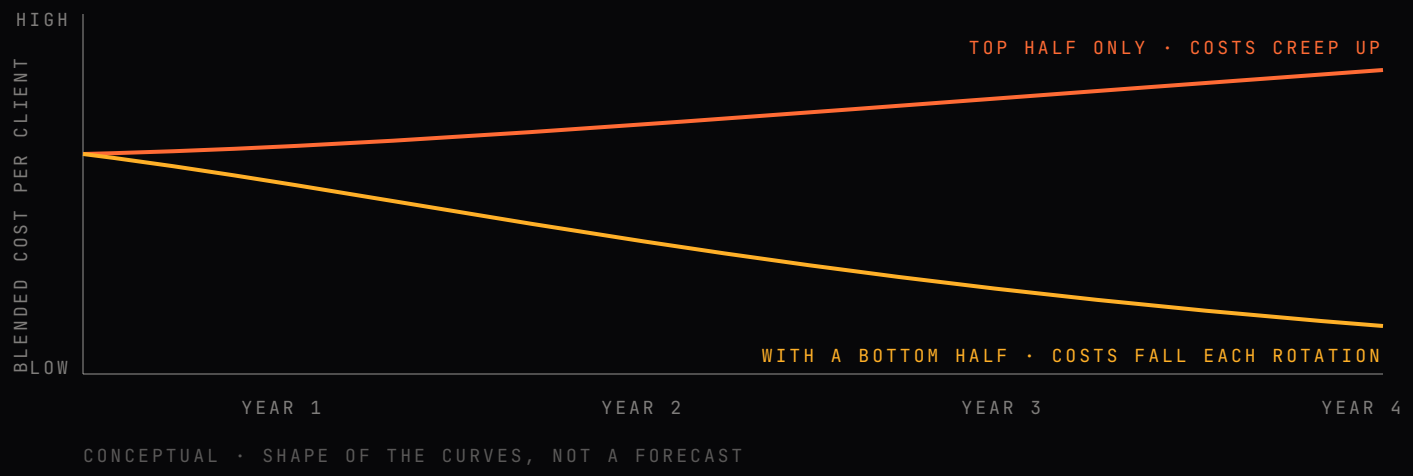
"Fewer than 1 in 20" is a SOLTECA field estimate from eight years of operating across 32 businesses and 25 industries. It is offered as an observation rather than a census.

[09.1 / THE ECONOMICS]

TWO HALVES, TWO COST CURVES

Every client from the top half is bought: media, tools, time, commissions. Clients from the bottom half are earned. The more of your growth that comes from below the line, the lower your blended cost to acquire.

WHERE THE CLIENT CAME FROM	WHAT YOU PAY FOR	RELATIVE COST TO ACQUIRE
PAID ADS	Media, creative, agency fees, landing pages	
COLD OUTREACH	Data, tools, rep time	
CONTENT	Production time, distribution	
REFERRAL	A thank-you, sometimes a reward	
REPEAT CLIENT	An email and a well-timed offer	



CONCEPTUAL · SHAPE OF THE CURVES, NOT A FORECAST

5–25×
MORE TO ACQUIRE A CLIENT THAN TO KEEP ONE · HBR

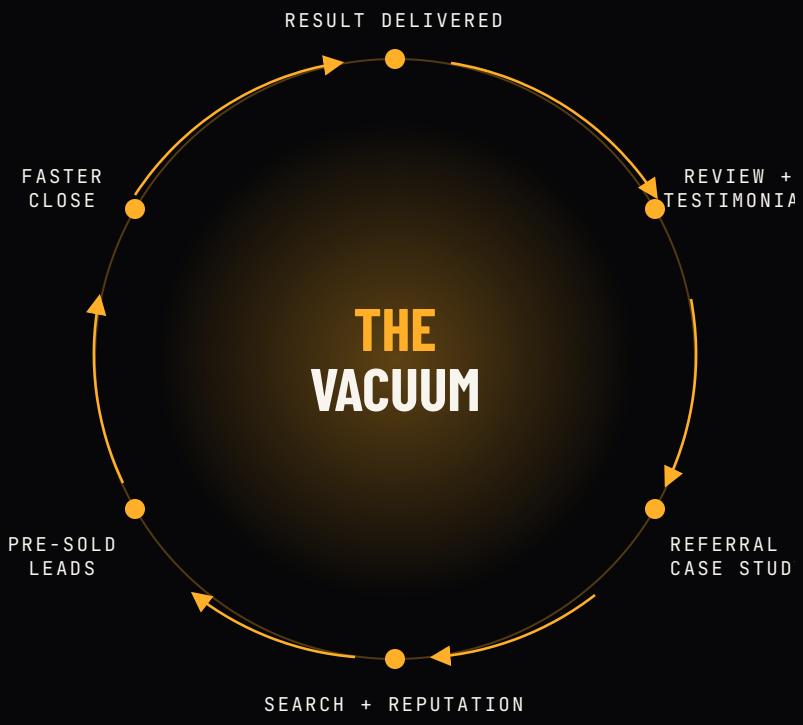
25–95%
PROFIT GAIN FROM A 5-POINT RISE IN RETENTION · BAIN

↓
BLENDED CAC EACH ROTATION AS EARNED CLIENTS GROW

[10 / THE VACUUM EFFECT]

PUSH VERSUS PULL

A top-half funnel pushes: every lead is bought and shoved toward a sale. A complete vortex pulls. Delivered results create low pressure at the bottom that draws new, pre-sold people in at the top.



WHAT A PULLED LEAD LOOKS LIKE

- Arrives already trusting you
- Asks fewer questions and needs fewer touches
- Pushes back less on price
- Closes faster and stays longer
- Costs close to nothing to acquire

LOW PRESSURE AT THE BASE

A tornado is fed by a pressure drop at the ground that pulls air inward from every direction. In a funnel, delivered results are that pressure drop. Each satisfied client lowers the resistance for the next stranger who hears about you.

TRAIT	PUSHED LEAD · BOUGHT	PULLED LEAD · REFERRED OR FOUND YOU
TRUST AT FIRST CONTACT	Starts at zero	Borrowed from the person who sent them
TOUCHES TO CLOSE	Many	Few
PRICE RESISTANCE	High, compares quotes	Lower, already sold on the outcome
COST TO ACQUIRE	Media plus labor	A thank-you

[IN PLAIN TERMS]

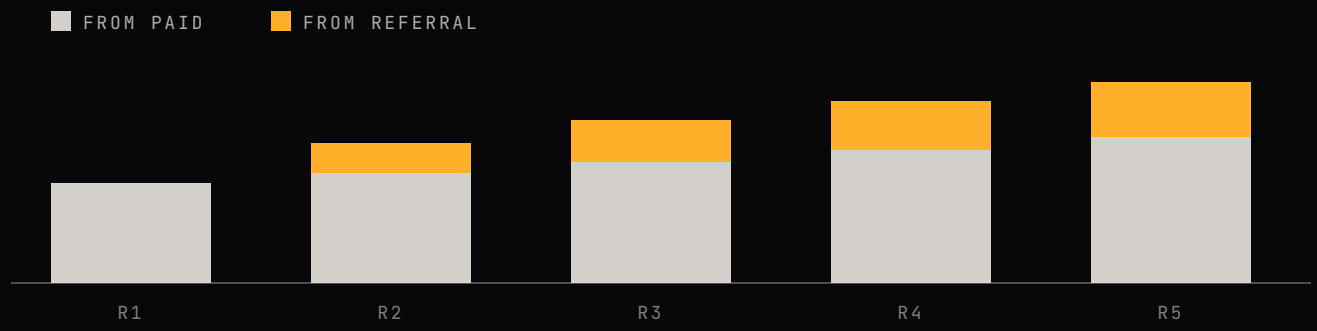
Push funnels need fuel every day. A vacuum keeps drawing new leads in with every client you serve well, even in the weeks you stop advertising.

[10.1 / SPIN MATH]

EVERY ROTATION SPINS FASTER

A worked model of what happens when the bottom half is built. Ad spend stays flat. Two things change: reviews and reputation lift paid conversion 10% per rotation, and 30% of last rotation's clients each send one new client.

ROTATION	FROM PAID	FROM REFERRAL	TOTAL CLIENTS	BLENDED COST INDEX
01	100	0	100	100
02	110	30	140	71
03	121	42	163	61
04	133	49	182	55
05	146	55	201	50



TWICE THE CLIENTS. HALF THE COST EACH. SAME AD BUDGET.

The model holds spend constant and uses modest rates. Real referral rates vary widely by industry and by how well the ask is engineered. The direction does not vary: once the bottom half exists, each rotation adds clients that cost almost nothing.

ILLUSTRATIVE MODEL · ROUNDED · INDEX: ROTATION 1 COST PER CLIENT = 100

[11 / TEN ORGANIC INFLOWS]

WHAT THE BOTTOM HALF FEEDS BACK TO THE TOP

A working bottom half opens ten inflows that ad spend cannot buy. Each one is fed by a stage below the line and run by a system you can own.

#	INFLOW	HOW IT BRINGS LEADS	FED BY	SYSTEM THAT RUNS IT
01	**REFERRALS**	Clients introduce people who already trust you	07	Referral engine, two set asks
02	**REVIEWS**	Star ratings decide who gets the call from search	07	Post-delivery review request
03	**TESTIMONIALS**	Video and quotes answer objections before the call	05 · 07	Capture at the result milestone
04	**CASE STUDIES**	Specific stories become sales assets and content	07	Win-to-story workflow
05	**GOOGLE SEARCH**	Reviews, mentions, and pages lift local and organic rank	07	Review velocity + published wins
06	**AI SEARCH**	Assistants cite companies with consistent public proof	07	Structured case studies, reviews
07	**AWARDS & ACCOLADES**	Third-party recognition raises status and trust	05 · 07	Submission calendar, proof library
08	**PARTNER INTROS**	Adjacent businesses refer when they see results	06 · 07	Partner program and tracking
09	**COMMUNITY**	Clients talk in groups, events, and neighborhoods	05	Client events, shared content
10	**REPEAT & RETURN**	Past clients buy again and reactivate on schedule	06	Renewal and reactivation triggers

THE COMPOUNDING PART

These inflows stack. A referral reads your reviews, watches a testimonial, finds you in search, and arrives ready to buy. Each rotation makes all ten stronger at once.

WHY THEY ARE FREE

The cost was paid when you delivered the result. A system simply makes sure the result gets captured, published, and asked about, every time.

[11.1 / FROM GOODWILL TO INFRASTRUCTURE]

THE BOTTOM HALF, MANUAL VS ENGINEERED

The same eight moments happen in every service business. The difference is whether someone has to remember them or a system makes them happen on time.

MOMENT	MANUAL · RUNS ON MEMORY	ENGINEERED · RUNS ON INFRASTRUCTURE
HANDOFF	Sales emails delivery a summary, sometimes	Deal close triggers a client record, kickoff tasks, and a welcome sequence
ONBOARDING	A kickoff call when schedules allow	A paced sequence that drives the client to the first result fast
CHECK-INS	When the client complains	Scheduled health checks with a score that flags risk early
RENEWALS	Noticed after they lapse	Dated triggers at 90, 60, and 30 days with a renewal offer
NEXT OFFER	Mentioned if the owner remembers	Triggered at the result milestone, matched to what the client bought
REVIEWS	Asked occasionally, by text, from a personal phone	Requested after every delivery, routed to the right platform, tracked
REFERRALS	”Let us know if you know anyone”	Two set asks, a simple share path, attribution, and a thank-you
PROOF	Great results stay in the inbox	Wins become case studies, posts, and pages on a schedule

8
MOMENTS TO ENGINEER BELOW THE LINE

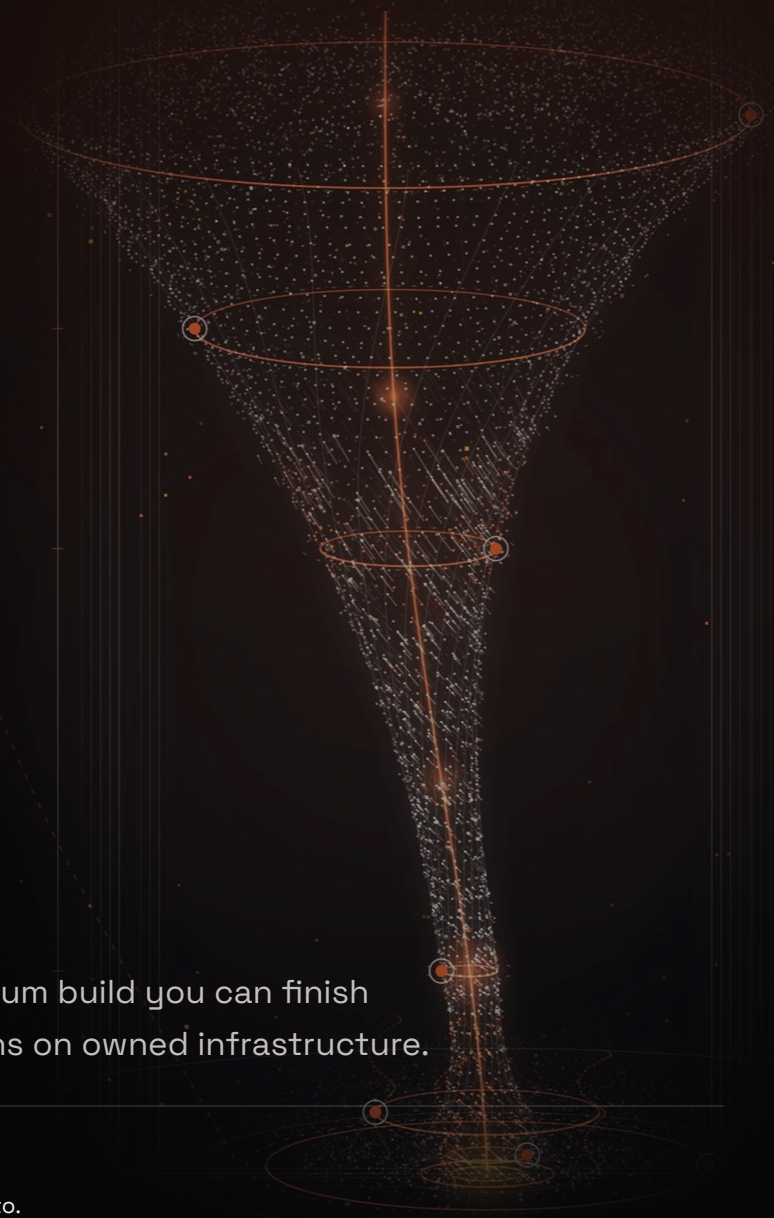
1
CUSTOMER RECORD THAT TRIGGERS ALL OF THEM

0
THINGS ANYONE HAS TO REMEMBER

[IN PLAIN TERMS]

Clients feel the goodwill. A schedule is what makes it reach every one of them, every time, without anyone having to remember.

IV



[PART IV]

THE BUILD

Seven stages, each drawn twice: the minimum build you can finish this week, and the enterprise build that runs on owned infrastructure.

BUILD IN DEPENDENCY ORDER

01	**Spine first.** One customer record every system writes to.
02	**Capture second.** Forms, calls, and chats land in the spine instantly.
03	**Nurture and convert third.** Speed-to-lead, sequences, pipeline, reminders.
04	**Bottom half fourth.** Onboarding, renewals, reviews, referrals.
05	**Reporting throughout, agents last.** Automate what is already working.

Owners with path A on p.04 read every stage in order. Owners with path B jump to the stage the audit on p.42 flags first.

[12.01 / STAGE 01 OF 07]



AWARENESS

01

◇ VORTEX PART · INFLOW

Put one clear offer in front of the right strangers every day, through at least two channels you control.

STORM LAW	01 · INFLOW
LEAKS SEALED	L01 · L02 · L03

MANUAL · THE COMMON STARTING POINT

- Posting when there is time
- One channel carries everything
- The message describes the company
- Boosted posts with no capture point

ENGINEERED · THE TARGET STATE

- One avatar and one problem, written down
- Content published on a fixed schedule
- Two or more channels running daily
- Every touch points to a capture page
- Leads and cost tracked by source

MINIMUM VIABLE BUILD · THIS WEEK

- [ ] Write the one-sentence avatar and the problem you solve for them
- [ ] Pick two of the Core Four: warm outreach, content, cold outreach, paid ads
- [ ] Set a daily volume floor, such as 100 primary actions a day
- [ ] Point every post, ad, and message at one capture page
- [ ] Log every lead's source in one place

ENTERPRISE BUILD · WHAT SOLTECA INSTALLS

- Content engine: one long piece cut into dozens of short assets
- Outreach automation with list building and enrichment
- Ad accounts wired to the CRM for closed-revenue attribution
- Source capture on every form, call, and chat
- Channel dashboard: cost per lead and cost per client by source

THE NUMBERS THAT PROVE IT WORKS

Leads per day, by channel	Rising weekly
Share of leads from top channel	Under 60%
Cost per lead, by source	Trending down

[IN PLAIN TERMS]

Awareness is fuel. Measure it daily, keep two sources, and make sure every bit of attention has somewhere to land.

[12.02 / STAGE 02 OF 07]



ATTRACT

◇ VORTEX PART · MESOCYCLONE

02

Turn attention into a known contact by giving away a complete solution to one narrow problem.

STORM LAW	01 · INFLOW
LEAKS SEALED	L04 · L05 · L06

MANUAL · THE COMMON STARTING POINT

- A "contact us" form
- "Book a call" is the only door
- Downloads emailed by hand
- No record of where a lead came from

ENGINEERED · THE TARGET STATE

- A lead magnet for the many, a direct offer for the ready
- One capture page per magnet
- Instant delivery, CRM record, and source tag
- A thank-you page with the next step
- Intent scoring on every contact

MINIMUM VIABLE BUILD · THIS WEEK

- [ ] Pick one problem your buyer has before they are ready to buy
- [ ] Build a reveal-type magnet: scorecard, audit, or checklist (p.40)
- [ ] One page: headline, three bullets, a short form
- [ ] Deliver automatically and tag the contact in your CRM
- [ ] Offer the next step on the thank-you page

ENTERPRISE BUILD · WHAT SOLTECA INSTALLS

- Magnet library mapped to avatar and awareness level
- Capture surfaces with headline split testing
- Instant routing into the pipeline with source and intent score
- Interactive calculators and quizzes that diagnose the buyer
- Retargeting audiences synced from the CRM

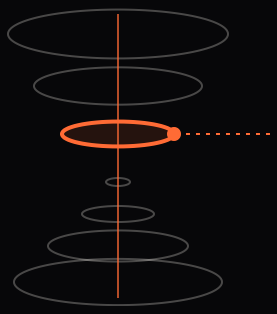
THE NUMBERS THAT PROVE IT WORKS

Opt-in rate on capture pages	20%+
Lead to booked conversation	Tracked weekly
Cost per engaged lead	Trending down

[IN PLAIN TERMS]

The magnet is the second door. It catches the interested people who are not ready to talk yet, and it tells you exactly who they are.

[12.03 / STAGE 03 OF 07]



NURTURE

◇ VORTEX PART · WALL CLOUD

03

Respond in minutes, follow up for weeks, and move interest toward a decision without anyone having to remember.

STORM LAW	02 · ANGULAR MOMENTUM
LEAKS SEALED	L07 · L08 · L09

MANUAL · THE COMMON STARTING POINT

- Reply when someone sees the inquiry
- One or two attempts, then silence
- Old leads never contacted again
- Follow-up lives in a rep's head

ENGINEERED · THE TARGET STATE

- Response in under five minutes, every time
- A 10+ touch sequence across call, text, and email
- Sequences stop the moment a lead replies
- Education that answers objections in advance
- Reactivation of dormant leads every quarter

MINIMUM VIABLE BUILD · THIS WEEK

- [ ] Turn on an instant text and email reply for every form
- [ ] Write a 10-touch, 14-day sequence mixing call, text, and email
- [ ] Name one person to call every new lead within five minutes
- [ ] Export every lead from the last 24 months
- [ ] Send one reactivation message to that list this week

ENTERPRISE BUILD · WHAT SOLTECA INSTALLS

- Speed-to-lead automation with AI voice and SMS agents, day and night
- Sequence library by lead source and stage
- Behavior-triggered branching on opens, clicks, and replies
- Lead reactivation flows on the full database
- Response-time dashboard by rep and by hour

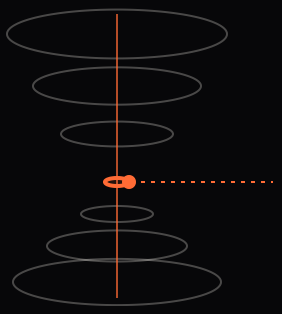
THE NUMBERS THAT PROVE IT WORKS

First response time	Under 5 min
Touches before a yes or a clear no	10+
Lead to booked rate	Rising monthly

[IN PLAIN TERMS]

Interest decays by the minute. Nurture is a machine that answers first and keeps calling back long after a person would have given up.

[12.04 / STAGE 04 OF 07]



CONVERT

◇ VORTEX PART · TOUCHDOWN

04

Run the same measured sales process on every opportunity until it ends in a signature or a clear no.

STORM LAW	03 · GROUND CONTACT
LEAKS SEALED	L10 · L11 · L12

MANUAL · THE COMMON STARTING POINT

- Every rep runs their own call
- No reminders before appointments
- No-shows treated as lost
- Proposals sent, then forgotten

ENGINEERED · THE TARGET STATE

- Pipeline stages with entry and exit conditions
- A scripted call and a scorecard
- Reminders at 24 hours, 1 hour, and 10 minutes
- A rebook flow for every no-show
- A post-proposal cadence, e-sign, and payment link

MINIMUM VIABLE BUILD · THIS WEEK

- [ ] Write your pipeline stages on one page with the exit condition for each
- [ ] Script the first call: open, diagnose, prescribe, close
- [ ] Send reminders 24 hours and 1 hour before every call
- [ ] Text every no-show within ten minutes with a rebook link
- [ ] Follow up every proposal on days 1, 3, 7, and 14

ENTERPRISE BUILD · WHAT SOLTECA INSTALLS

- Custom pipeline on an owned CRM spine
- Call recording, transcription, and scoring
- Calendar booking with layered reminders and no-show recovery
- Proposal, e-signature, and payment in a single flow
- Weekly close-rate reporting by rep and by source

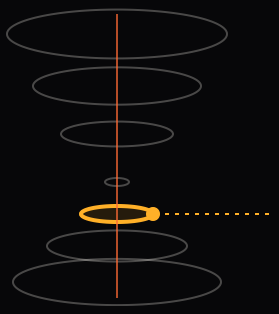
THE NUMBERS THAT PROVE IT WORKS

Show rate on booked calls	80%+
Close rate on shows	Tracked by rep
Days from inquiry to signature	Trending down

[IN PLAIN TERMS]

The sale is the narrowest point of the vortex. A written process makes every rep perform like your best one, and reminders protect every call you worked to book.

[12.05 / STAGE 05 OF 07]



RETAIN

05

◇ VORTEX PART · VORTEX CORE

Deliver the promised result quickly and consistently, and catch risk before the client feels it.

STORM LAW	03 · GROUND CONTACT
LEAKS SEALED	L13 · L14 · L15

MANUAL · THE COMMON STARTING POINT

- Handoff by email, if at all
- Kickoff when calendars allow
- Problems surface at cancellation
- Delivery quality depends on who is assigned

ENGINEERED · THE TARGET STATE

- Closed-won triggers onboarding automatically
- Welcome sequence and kickoff booked on day one
- The first result tracked against a target date
- A health score from check-ins and engagement
- Risk alerts routed to an account owner

MINIMUM VIABLE BUILD · THIS WEEK

- [ ] List the five things every new client must receive in week one
- [ ] Build a handoff form sales completes before marking a deal won
- [ ] Define the first result and the day it should land
- [ ] Schedule check-ins at day 7, 30, and 90
- [ ] Ask at each one: how likely are you to recommend us, 0 to 10?

ENTERPRISE BUILD · WHAT SOLTECA INSTALLS

- Automated onboarding flows by service line
- Client record and portal shared by sales and delivery
- Time-to-value tracking against the promise made in sales
- Health scoring with early-warning alerts
- Delivery SOPs embedded in the workflow

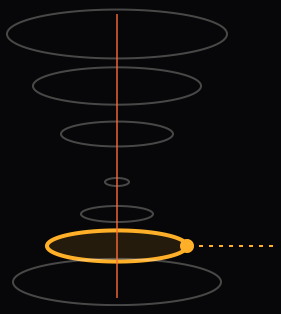
THE NUMBERS THAT PROVE IT WORKS

Days to first result	Against target
Gross revenue retention	90%+
Check-in score (0 to 10)	9+ average

[IN PLAIN TERMS]

Retention is delivery measured. Every client who reaches a fast result becomes a candidate for the next three stages.

[12.06 / STAGE 06 OF 07]



ASCEND

06

◇ VORTEX PART · SUCTION VORTICES

Offer the next right thing at the moment the client is most likely to want it: upsells, downsells, continuity, and renewals.

STORM LAW	05 · RECIRCULATION
LEAKS SEALED	L16 · L17 · L18

MANUAL · THE COMMON STARTING POINT

- No designed next offer
- Renewals noticed after they lapse
- Upsells pitched at random
- Revenue per client never measured

ENGINEERED · THE TARGET STATE

- An offer ladder: upsell, downsell, continuity
- Offers triggered at result milestones
- Renewal triggers at 90, 60, and 30 days
- Maintenance or membership plans
- Revenue per client on the dashboard

MINIMUM VIABLE BUILD · THIS WEEK

- [ ] List what your clients buy after you, from anyone
- [ ] Design one follow-on offer and one continuity plan
- [ ] Put every renewal date in the CRM
- [ ] Make the offer only after the first result is confirmed
- [ ] Offer a smaller downsell to anyone who declines

ENTERPRISE BUILD · WHAT SOLTECA INSTALLS

- Offer ladder mapped to the client journey
- Milestone-triggered offers by text and email
- Renewal automation with save offers
- Continuity billing on the owned spine
- Net revenue retention dashboard by cohort

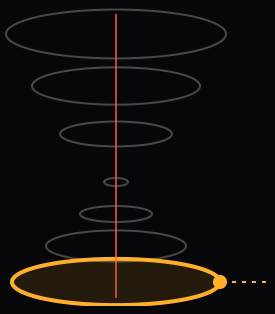
THE NUMBERS THAT PROVE IT WORKS

Net revenue retention	100%+
Revenue per client	Rising yearly
Renewal rate	Tracked monthly

[IN PLAIN TERMS]

Clients who got a result want more of it. Ascension makes sure they can buy it from you, at the right moment, without anyone having to remember to ask.

[12.07 / STAGE 07 OF 07]



FLYWHEEL

07

◇ VORTEX PART · DEBRIS CLOUD

Turn every result into a review, a referral, and a piece of public proof that brings in the next client.

STORM LAW	05 · RECIRCULATION
LEAKS SEALED	L19 · L20 · L21

MANUAL · THE COMMON STARTING POINT

- Reviews requested occasionally
- "Let us know if you know anyone"
- Wins stay in the inbox
- Nobody knows which clients refer

ENGINEERED · THE TARGET STATE

- A review request after every delivery
- Happy clients routed to public reviews, unhappy ones to recovery
- Referral asks at two set moments
- Share links, attribution, and a thank-you
- Wins turned into case studies and pages

MINIMUM VIABLE BUILD · THIS WEEK

- [ ] Send a review request to every client served in the last 90 days
- [ ] Add the review request to your delivery checklist, same day
- [ ] Choose your two referral moments and write the ask
- [ ] Give referrers a simple link or card, and thank every one
- [ ] Publish one client win this month as a short case study

ENTERPRISE BUILD · WHAT SOLTECA INSTALLS

- Automated review engine with routing by score
- Referral program with tracking and rewards
- Testimonial capture at the result milestone
- Case-study pipeline feeding search and AI answers
- Referral-sourced revenue on the dashboard

THE NUMBERS THAT PROVE IT WORKS

Clients asked for a review	100%
Share of clients who refer	Rising quarterly
Revenue from referred clients	Tracked monthly

[IN PLAIN TERMS]

The flywheel is where the vortex feeds itself. Every result you capture and publish lowers the cost of the next client.

[13 / ENGINEERING THE MAGNET]

THE $100M LEAD MAGNET METHOD

A lead magnet is a complete solution to a narrow problem that reveals the next problem your core offer solves. Think salty pretzels at a bar: they solve hunger and create thirst, and the drink is what you sell.

THE SEVEN STEPS

01	**Pick the problem and the person.** Narrow, meaningful, and one step before your core offer.
02	**Choose how to solve it.** Reveal a problem, give a sample, or give one step.
03	**Choose how to deliver it.** Software, information, service, or physical.
04	**Test the name.** A strong name can lift response several times over.
05	**Make it easy to consume.** A result or insight inside five minutes, on a phone.
06	**Make it genuinely good.** Give away the secrets and sell the implementation.
07	**Make the next step obvious.** A clear action and a real reason to take it now.

THREE TYPES, WITH SERVICE EXAMPLES

REVEAL	Speed-to-lead audit · roof inspection with photos · tax overpayment review · website load test
TRIAL	First month of service at cost · free reactivation of 100 old leads · a sample treatment
ONE STEP	The intake scorecard · the first coat of sealant · step one of a five-step plan

FOUR DELIVERY MODES

- SOFTWARE · CALCULATORS, SCORECARDS
- INFORMATION · GUIDES, PLAYBOOKS
- SERVICE · AUDITS, DONE-FOR-YOU SLICES
- PHYSICAL · BOOKS, KITS

Three types × four modes gives twelve variants to test. Rotate them rather than betting the company on one.

SIX NAMING FORMULAS

1	[Number] + [Outcome] + [Timeframe]	"5 Systems That Cut Response Time to Under 5 Minutes"
2	How to [Result] Without [Pain]	"How to Book More Jobs Without Hiring Another Rep"
3	The [Adjective] [Thing] That [Does X]	"The 10-Minute Audit That Finds Your Revenue Leaks"
4	[X] Mistakes That [Cost Y]	"7 Mistakes That Keep Owners Stuck as the Hub"
5	Why You'll Never [Outcome] Without...	"Why You'll Never Exit on Rented Infrastructure"
6	The Secret Behind [Result]	"The Secret Behind a Calendar Full of Referrals"

THE THREE-QUESTION TITLE TEST

- ☐ Would your ideal client click it?
- ☐ Does it promise a specific, wanted result?
- ☐ Would they pay $10 for it on the name alone?

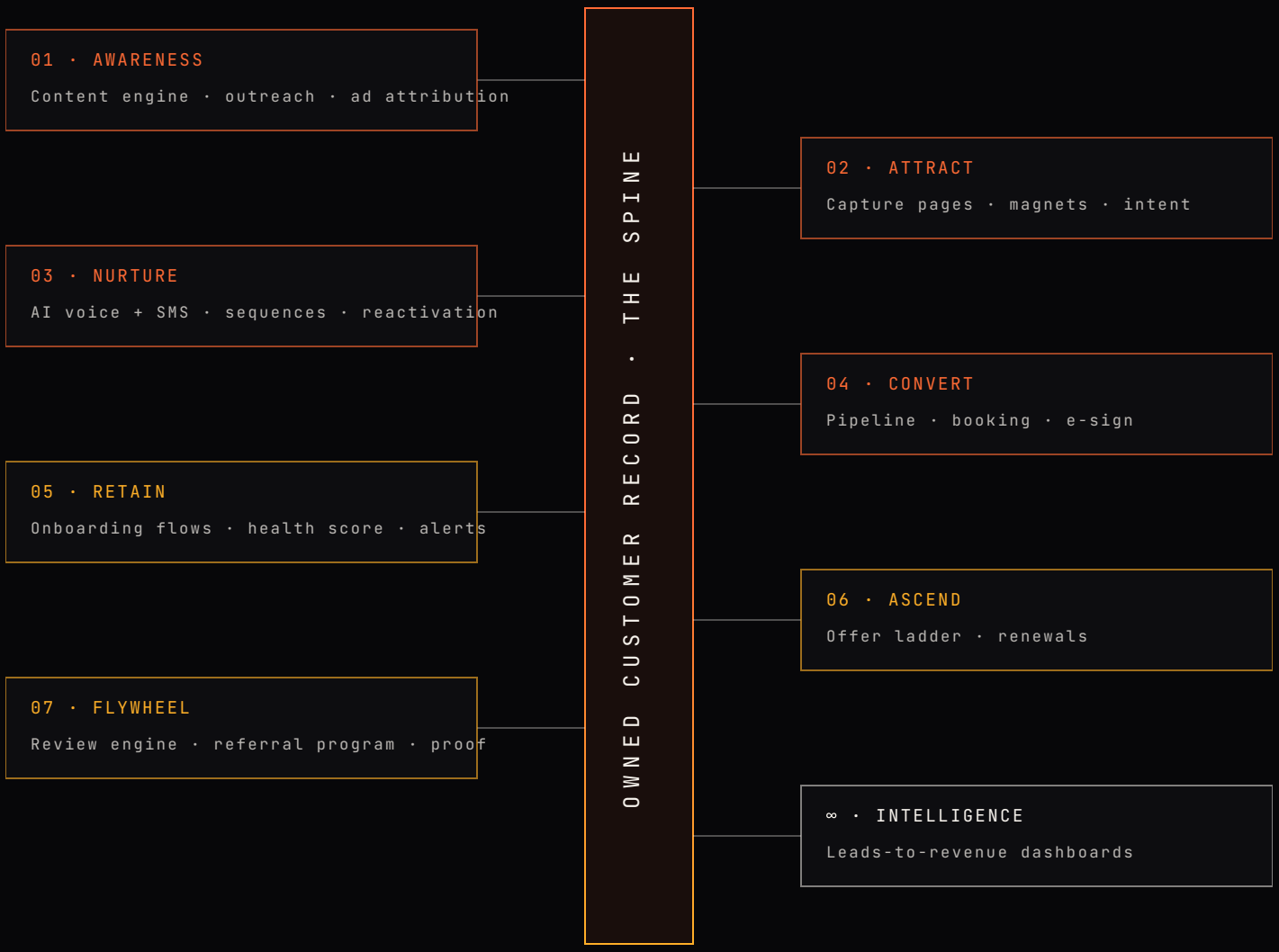
Any "no" means repackage and rename before you rewrite the content.

Method adapted from Alex Hormozi, $100M Leads (2023), lead magnet chapter, and the SOLTECA Lead Magnet Blueprint v1.0.

[14 / THE OWNED SPINE]

ONE RECORD. EVERY STAGE WIRED TO IT.

The enterprise build is a single customer record at the center with each stage's system docked to it. Every touch, every call, every review, and every dollar writes back to the same place.



ON YOUR DOMAIN · YOUR DATA · TRANSFERABLE WITH THE COMPANY

RENTED

Seven tools, seven logins, seven copies of the customer. Nothing talks to anything, and the data leaves when the subscription does.

OWNED

One spine on your domain, with every stage docked to it. It shows up as an asset on the balance sheet and transfers with the company at exit.

[15 / THE EF7 LEAK AUDIT · PART A]

SCORE YOUR SEVEN STAGES

Twenty-eight statements, four per stage. Score each one honestly. In the live version, tap a score and the totals calculate themselves.

0 · NO, OR NOT SURE	1 · SOMETIMES, BY HAND	2 · ALWAYS, BY SYSTEM

01 AWARENESS		__ / 8
01.1	New leads come from at least two channels we control	0 1 2
01.2	We can name our ideal client and their main problem in one sentence	0 1 2
01.3	We take a set number of marketing actions every day, even in busy weeks	0 1 2
01.4	We know our cost per lead by source	0 1 2
02 ATTRACT		__ / 8
02.1	We offer something valuable to people not ready to book a call	0 1 2
02.2	Every form creates a CRM record and sends an instant confirmation	0 1 2
02.3	At least 20% of visitors to our capture page opt in	0 1 2
02.4	We know where every single lead came from	0 1 2
03 NURTURE		__ / 8
03.1	Every new lead hears from us within five minutes	0 1 2
03.2	Leads get 10 or more follow-up touches before we stop	0 1 2
03.3	We contact old, unconverted leads at least once a quarter	0 1 2
03.4	Follow-up runs without anyone having to remember it	0 1 2
04 CONVERT		__ / 8
04.1	Every rep follows the same written sales process	0 1 2
04.2	Every booked call gets automated reminders	0 1 2
04.3	No-shows get a rebook message within the hour	0 1 2
04.4	Every proposal gets scheduled follow-up until a yes or a no	0 1 2

"Not sure" scores zero. If nobody can confirm it happens, it is not happening reliably.

[15.1 / THE EF7 LEAK AUDIT · PART B]

THE BOTTOM HALF AND YOUR SCORE

05 RETAIN		__ / 8
05.1	A deal marked won starts onboarding automatically	0 1 2
05.2	We define and track each client's first result	0 1 2
05.3	We run scheduled check-ins and score client health	0 1 2
05.4	We know our client retention rate	0 1 2
06 ASCEND		__ / 8
06.1	Clients have a designed next offer after the first purchase	0 1 2
06.2	Renewal dates live in the CRM with automated reminders	0 1 2
06.3	We make offers only after results are confirmed	0 1 2
06.4	We track revenue per client over time	0 1 2
07 FLYWHEEL		__ / 8
07.1	Every client is asked for a review after delivery	0 1 2
07.2	We ask for referrals at set moments, with an easy way to share	0 1 2
07.3	We track which clients refer and thank every one	0 1 2
07.4	Client wins become published case studies or content	0 1 2

TOTAL SCORE

__

OUT OF 56

FIRST CONSTRAINT

LOWEST STAGE

SCORE	WHAT IT MEANS
0 – 18	**Storm forming.** The funnel runs on the owner. Start with the spine and Stage 03 this month.
19 – 32	**Mature, held up by effort.** Sales happen, leaks are wide. Price them on p.44 and seal the top two.
33 – 44	**Rotating.** The top half works. The money is in the bottom half and in automation.
45 – 56	**Vortex.** Tune, measure, and widen the inflow. Your constraint is volume.

[IN PLAIN TERMS]

The lowest-scoring stage is a starting point. The calculator on the next page tells you which leak costs the most money, and money decides the order.

[16 / LEAK COST CALCULATOR]

PUT A DOLLAR FIGURE ON EACH LEAK

Enter your own monthly numbers. The recovery rates are the same conservative ones used in the ledger on p.21. In the live version every figure calculates as you type.

YOUR BASELINE

Average client value (first purchase), $	8000
Inquiries per month	250
Close rate from inquiry to client, %	12.5

LEAK	YOUR INPUT	VALUE	FORMULA	PER MONTH
L07	% of inquiries answered after one hour	30	inquiries × % × 50% × close × value	$ _____
L08	% of leads with two touches or fewer	40	inquiries × % × 3% × value	$ _____
L11	No-shows per month	10	no-shows × 40% × 40% × value	$ _____
L12	Proposals per month with no follow-up	5	proposals × 20% × value	$ _____
L15	Avoidable client losses per month	1.7	losses × value	$ _____
L16	Value of a follow-on offer, $	3000	new clients × 15% × offer value	$ _____
L20	% of clients who refer today	5	new clients × (15% - today) × value	$ _____
	MONTHLY LEAKAGE			$ _____
	ANNUAL LEAKAGE		monthly × 12	$ _____

YOUR MOST EXPENSIVE LEAK

_____

This is the default first repair, unless the spine is missing. See p.45.

READ THE RESULT CAREFULLY

These are estimates on seven of twenty-one leaks. Treat the total as a floor. The point is the ranking: which leak to seal first, and roughly what sealing it is worth.

[17 / FIND YOUR CONSTRAINT]

FIX THE LEAK CLOSEST TO THE MONEY

Answer each question in order. The first "no" is your starting point. When this tree and the calculator disagree, follow the dollars.

01 · Does every lead land in one customer record, instantly, with its source?
NO → BUILD THE SPINE
p.41 · everything sits on it

YES

02 · Does every new lead hear from you in under five minutes, with 10+ follow-ups?
NO → STAGE 03 · NURTURE
p.35 · fastest money first

YES

03 · Is your show rate above 80%, and does every proposal get scheduled follow-up?
NO → STAGE 04 · CONVERT
p.36 · protect booked calls

YES

04 · Is every client onboarded, checked on, and asked for a review and a referral?
NO → STAGES 05 + 07
p.37 · p.39 · start the vacuum

YES

05 · Do you have two inflow channels and a magnet converting 20% or better?
NO → STAGES 01 + 02
p.33 · p.34 · widen the inflow

YES

06 · Does every client have a designed next offer and a tracked renewal date?
NO → STAGE 06 · ASCEND
p.38 · raise revenue per client

YES

ALL YES · YOUR CONSTRAINT IS VOLUME

Open the tap: raise daily inflow actions until you hit your goal. The vortex is ready to carry it.

[17.1 / THE 30-DAY REPAIR PLAN]

THIRTY DAYS, FOUR WEEKS, ONE SPINE

A do-it-yourself sequence for the owner who wants to start now. It follows the dependency order on p.32 and seals the leaks that pay back fastest first.

WEEK	BUILD	DONE WHEN
WEEK 1 SPINE + SPEED	— Choose one CRM as the single customer record and route every form, call, and chat into it — Turn on instant text and email replies — Name the five-minute caller and set the hours — Tag every lead with its source	Every new lead appears in one place and gets a reply in minutes
WEEK 2 NURTURE + CONVERT	— Load the 10-touch, 14-day sequence — Add call reminders and the no-show rebook text — Write the one-page sales process and first-call script — Start the day 1, 3, 7, 14 proposal cadence	No lead, call, or proposal can be forgotten
WEEK 3 RETAIN + REVIEWS	— Build the handoff form and the week-one welcome sequence — Define each service's first result and target day — Schedule day 7, 30, and 90 check-ins with the 0 to 10 question — Request reviews from every client served in the last 90 days	Every new client is onboarded and every finished one is asked
WEEK 4 REFERRAL + REACTIVATE	— Write the two referral asks and the share link — Design one follow-on offer and load renewal dates — Send the reactivation message to the dormant database — Build a one-screen dashboard with the seven core metrics	The bottom half is live and the dashboard shows all seven stages

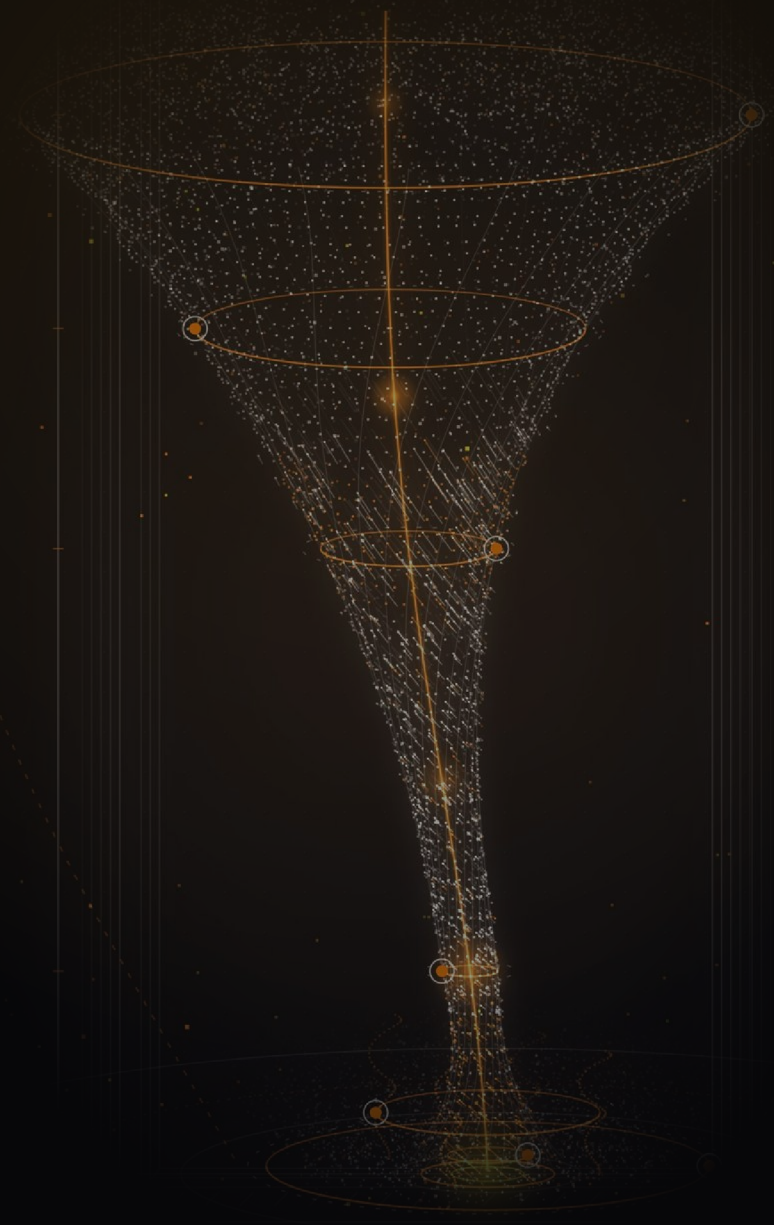
EXPECT THIS

Week one usually shows the fastest change because response time moves immediately. Weeks three and four take longer to show in revenue, and they compound for years.

WHERE OWNERS STALL

Week two and week four. Writing sequences and offers takes focused hours that a busy owner rarely has. That is the point where a builder pays for itself.

VI



[PART VI]

THE BRIDGE

Every visionary had a builder.

From the blueprint to a working vortex: build it yourself with Parts IV and V, or have it designed, built, managed, and scaled with you.

18 · THE BUILDERS
19 · SIX PHASES
20 · ROI + PROOF
21 · NEXT STEP

[18 / THE MASTER BUILDER]

THE VISION AND THE BUILDER

The founders we remember held a picture of the future. Next to each of them stood someone who engineered that picture into a machine that worked every day, at scale, whether or not the founder was in the room.

THE VISION		THE BUILDER	
STEVE JOBS	×	**STEVE WOZNIAK**	Jobs saw a personal computer on every desk. Wozniak designed the Apple I and Apple II, the machines that turned the idea into a company.
ELON MUSK	×	**GWYNNE SHOTWELL**	Musk set the mission of reusable rockets. Shotwell, SpaceX president and COO since 2008, built the operation and the commercial engine that keeps them flying.
JEFF BEZOS	×	**JEFF WILKE**	Bezos imagined a store with everything in it. Wilke built the fulfillment network and operating system that made next-day delivery a habit.
WALT DISNEY	×	**ROY O. DISNEY**	Walt dreamed the parks and the films. His brother Roy built the financing and the business that paid for every one of them.
YOU	×	**SOLTECA**	You hold the picture of your company. We are the architects, builders, and engineers who turn it into owned infrastructure, then manage, optimize, and scale it one constraint at a time.

Historical roles summarized from public company histories. Named individuals are cited as illustration and have no affiliation with SOLTECA.

[18.1 / TWO WAYS TO BUILD]

PATH A OR PATH B. SAME BLUEPRINT.

Both paths use the seven stages and the six phases in this document. The difference is who carries the hours, how fast it goes live, and who keeps it spinning.

PHASE	PATH A · YOU BUILD IT	PATH B · SOLTECA BUILDS IT WITH YOU
DESIGN	You map your stages with this blueprint and the audit	We map the real operation with your team and specify every stage, field, and trigger
BUILD	You configure your CRM, sequences, and pages in the evenings	We build in dependency order on an owned spine, spine first
TEST	You test the paths you think of	We run real records through every path, including the ones that fail
LAUNCH	You switch it on and train the team as you go	We migrate data, cut over with a rollback path, and hold the system through week one
OPTIMIZE	You review numbers when time allows	We measure against targets weekly and tune what real usage exposes
SCALE	You find the next constraint yourself	We find the next binding constraint and build the system that releases it
TIME TO LIVE	As fast as your evenings allow	Engine live in under 7 days, full build-out inside 30
THE COST	Your hours, and the leakage that continues while you build	An engineering investment, measured against leakage recovered

CHOOSE PATH A IF

- You have ten or more focused hours a week
- You enjoy configuring systems
- Your audit score is above 33

CHOOSE PATH B IF

- Your calculator shows six figures of annual leakage
- You would rather run the company than wire it
- You want it live in days and managed after

[IN PLAIN TERMS]

Either way, the default outcome is the same goal: a company engineered to operate without you. Companies can’t exit on rented infrastructure.

[19 / THE SIX-PHASE MACHINE METHOD]

SIX PHASES. SIX EXITS.

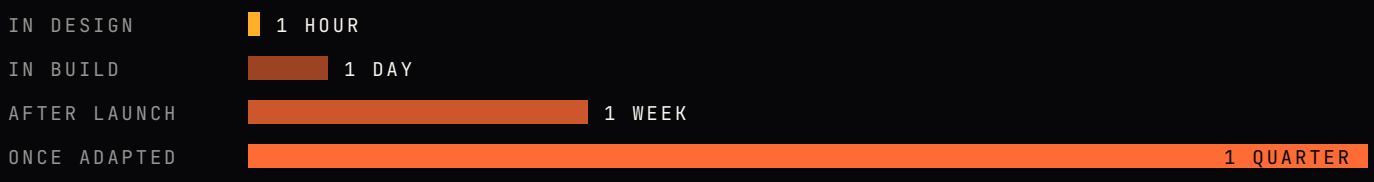
The method is the same whether we build eleven systems or ninety. Each phase closes with an artifact, and nothing moves forward until that artifact exists.

01 DESIGN → 02 BUILD → 03 TEST → 04 LAUNCH → 05 OPTIMIZE → 06 SCALE

PHASE 06 LOOPS BACK TO 01 FOR EACH NEW CONSTRAINT

#	PHASE	WHAT HAPPENS	EXIT ARTIFACT
01	**DESIGN**	Map the real operation with the people who do the work. Specify the data model, the stages, the logic, and every integration.	Architecture document
02	**BUILD**	Construct in dependency order. Spine first, capture second, conversion third, reporting fourth, agents last.	Working system
03	**TEST**	Run real records through every path, including the ones that fail. Simulate integration outages on purpose.	Test log
04	**LAUNCH**	Migrate live data, cut over with a rollback path, train each role on their own work, hold the system through week one.	Live operation
05	**OPTIMIZE**	Measure against targets, remove the steps the team quietly works around, tune against observed outcomes.	Performance read
06	**SCALE**	Identify the constraint that surfaced behind the one you removed. Build the capability that releases it.	Next roadmap

COST TO FIX ONE SPECIFICATION ERROR



WHY DESIGN GETS THE MOST ATTENTION

A specification error costs about an hour to fix in design, a day in build, a week after launch, and a quarter once your team has adapted its behavior around the mistake.

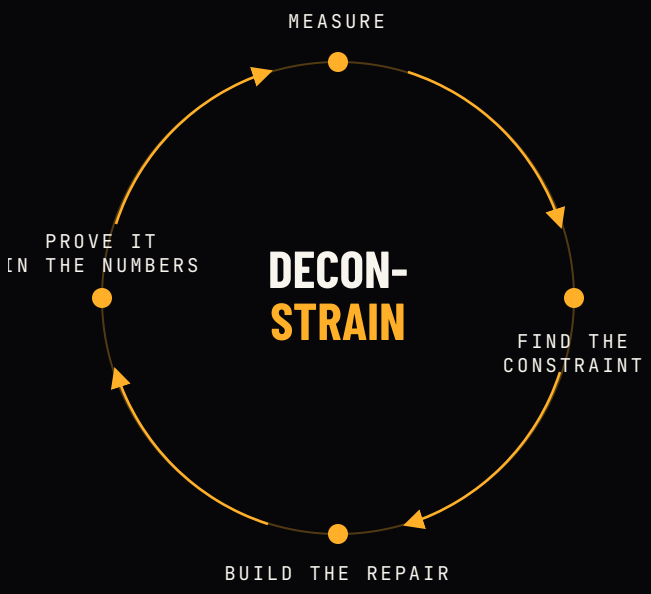
WHY PHASE SIX HAS NO END DATE

A growing business keeps producing new constraints. Each one removed reveals the next, which is how a company moves from three million to eight without proportional headcount.

[19.1 / MANAGE · OPTIMIZE · SCALE]

ONE CONSTRAINT AT A TIME

After launch, the work changes from building to deconstraining. Every month we find the stage that limits throughput, repair it, prove the repair in the numbers, and follow the constraint to wherever it moves next.



HOW THE CONSTRAINT MOVES · ONE TYPICAL PATH

M1	**Nurture.** Response time drops to minutes. Booked calls rise.
M2	**Convert.** More calls expose no-shows and stalled proposals.
M3	**Retain.** More clients strain onboarding. Handoffs get engineered.
M4	**Flywheel.** Delivered results become reviews and referrals.
M5	**Attract.** The sealed funnel can now absorb more traffic. A magnet opens the second door.
M6	**Ascend.** A larger client base makes the offer ladder worth building.

Your path is set by your audit and your ledger. The order changes. The loop stays the same.

THE MONTHLY CONSTRAINT TRACKER

MONTH	01	02	03	04	05	06	07
M1			●				
M2			✓	●			
M3			✓	✓	●		
M4			✓	✓	✓		●

MANAGEMENT

Weekly ROI reporting, KPI dashboards from leads to revenue, and a standing strategy call.

OPTIMIZATION

Copy, timing, routing, and scripts tuned against live data until each stage hits target.

SCALING

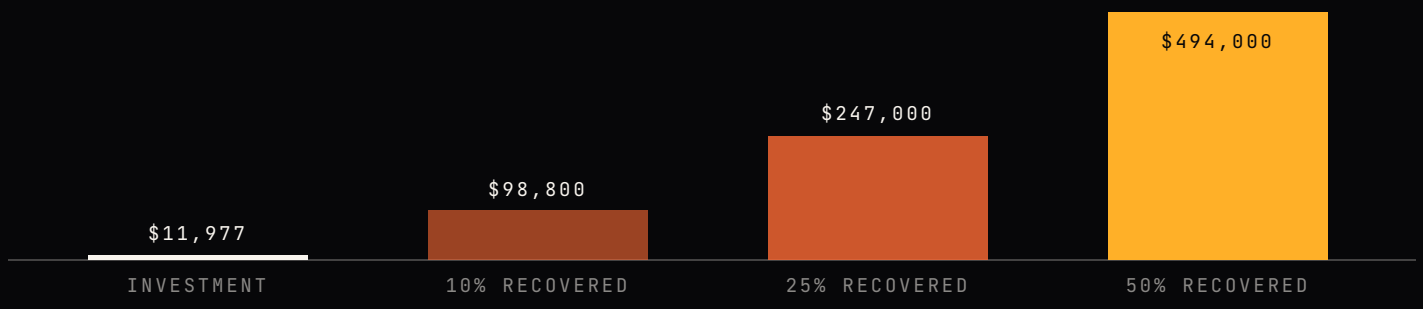
Automation, AI agents, and custom software extend as each new ceiling appears.

[20 / THE ROI OF A BUILDER]

WHAT SEALING THE NECK IS WORTH

Return to the $3M model company on p.21. Its four top-half leaks (L07, L08, L11, L12) cost $988,000 a year. Here is the return at three recovery levels against the entry engineering investment.

SCENARIO	LEAKAGE RECOVERED	REVENUE RETURNED, YEAR ONE	ENGINE 1 INVESTMENT	MULTIPLE
CONSERVATIVE	10%	$98,800	$11,977	8×
MODERATE	25%	$247,000	$11,977	21×
STRONG	50%	$494,000	$11,977	41×



ILLUSTRATIVE MODEL · NOT A PROMISE OR A CLIENT RESULT · REVENUE, NOT PROFIT · YOUR DIAGNOSTIC REPLACES EVERY ASSUMPTION WITH YOUR NUMBERS

WHAT THE MULTIPLE LEAVES OUT

- The nine bottom-half leaks, modeled at $629,000 a year on p.21
- Compounding from referrals and reviews (p.29)
- Owner hours returned to leadership
- Enterprise value of revenue that no longer depends on the owner

THE VALUE EQUATION, APPLIED

Dream outcome · a funnel that runs without you ↑

Likelihood · proven method, owned spine ↑

Time delay · engine live in under 7 days ↓

Effort · built with you, run for you ↓

THE QUESTION THAT MATTERS

Your calculator on p.44 produced an annual leakage figure. A builder is worth hiring when the leakage recovered in the first year is a multiple of the investment and the hours you get back are worth more to you than the configuration work.

[20.1 / THE TRACK RECORD]

BUILT ACROSS 25 INDUSTRIES

8	32	25	3
YEARS BUILDING REVENUE INFRASTRUCTURE	BUSINESSES ENGINEERED	INDUSTRIES	CONTINENTS

COMPANIES WE HAVE BUILT FOR

COMPANY	REVENUE TIER
TECFUSIONS	~$672M / yr
Powur	~$128M / yr
Apricot Solar	~$41M / yr
Sungrade Solar	~$25M / yr
NPE · No Problem Electric	~$14M / yr
The Mann Law	~$12M / yr
ONE PALM GROUP	~$11M / yr
RISE FP&A	~$10M / yr

THE OUTCOME CLASS

Custom CRMs, demand systems, revenue systems, operating systems, and AI automation. The portfolio pattern: 200%+ growth over two to four years, clients staying two years or more, and founder dependency removed.

THE INDUSTRIES

HVAC · Roofing · Solar · Data Centers · Real Estate · Counseling · Coaching · Medical · Insurance · Finance · Retirement · Wealth Management · Breweries · Yachts · Retail · Clothing · Pet Care · Child Care · Adult Care · AI · Software · Apps · Author Publishing · Earth Regeneration

Revenue tiers and outcome class are SOLTECA-attested. Tiers are approximate company revenue and do not represent revenue attributable to SOLTECA.

[20.2 / THE ENGAGEMENT]

THE SOLTECA SALES ENGINE

Engine 1 is the entry build. It installs the top half of the EF7 on an owned spine and starts the flywheel. The bottom half and ongoing optimization grow from there as the constraint moves.

FIVE BUILD PILLARS

01	Conversion-optimized acquisition surface	Stages 01–02
02	Custom CRM and pipeline spine	The spine
03	Demand generation systems	Stages 01–02
04	Conversion systems and automations	Stages 03–04
05	Revenue generation systems	Stage 07

WHAT YOU CAN COUNT ON

- Acquisition engine built and launched in under 7 days
- 30-day full build-out window
- Sub-5-minute speed-to-lead standard
- One owned CRM spine on your domain
- Growth flywheel: reviews, testimonials, referrals

INVESTMENT

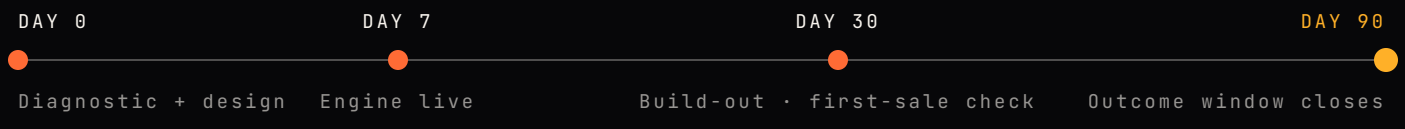
CUSTOM · STARTING AT

$11,977

$9,977 paid in full, or $11,977 in three equal payments over 90 days.

THE GUARANTEE

If the engine has not produced at least one closed sale attributable to it by day 30, we keep working at no additional Engine 1 fee until it does, inside the 90-day outcome window.



THEN · ASCENSION: THE CONSTRAINT MOVES AND THE BUILD FOLLOWS IT

THE BOTTOM HALF · ASCENSION BUILD

Onboarding flows, KPI dashboards from leads to revenue, renewal and offer systems, and weekly strategy are scoped as a recurring infrastructure partnership, from about $4,000 to $15,000+ a month, sized to operational surface area and measured ROI.

Current published pricing: solteca.io/numbers. Final scope is confirmed in the diagnostic. Capacity is limited to 5 to 10 new activations a month.

[21 / THE NEXT STEP]

BOOK THE EF7 LEAK DIAGNOSTIC

Ninety minutes with an engineer. Bring your numbers and leave with a map.

01	We run the 28-point audit with you
02	We price your three most expensive leaks
03	We hand you the build order, yours to keep

START HERE

SOLTECA.IO/LAUNCH

We open 5 to 10 new builds a month. The audit and build order are yours whether or not you build with us.

We build businesses that run without you.

DREAM IT. BUILD IT. SCALE IT.

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