

Ridgeline Truck Outfitters 90-Day Roadmap

Platinum Health Check, sample roadmap. Owner and operator: Dan Kessler. Four bays, truck and Jeep accessories, lifts, tonneaus, lighting, wheels and tires.

A standard example. The shop, the people and the figures are invented to show the depth, the math and the format you receive. Every dollar line is a benchmarked estimate with its assumption stated. Results vary by shop.

How to read this. Section 3 puts a number on each place the money hides, with the assumption behind it. Sections 4 to 6 are the 90 days, in order, each step naming who does it, the Shop System it installs (FM01 to FM12) and the decision point where you judge whether it is working. Section 7 is the list you check on day 90.

1. Situation diagnosis

Ridgeline had its biggest year. FY2025 came in at \$1.85M, up \$210K (12.8%) on FY2024. The problem is that net operating income fell from \$168K to \$121K, a drop of \$47K, and net margin fell from 10.2% to 6.5%. The shop sold more and kept less.

Three things drove that. Labor is billed at \$95 an hour, last raised in 2023, while two of the three competing shops in the county bill \$120 to \$135. The counter discounts to close: roughly three tickets in ten carry a 10% courtesy discount nobody approved. And parts cost rose with two distributor increases that were absorbed on jobs already quoted, because quotes are not dated and prices are not rechecked at the time of order.

Under the financials is a business that runs through one person. Dan writes every lift and every wiring quote, approves every discount, and is the only one who knows the landed price on a Carli or a Fox kit. When Dan was out for five days in March, eleven quotes sat unsent and four of them went to the shop down the road. Rick, the lead tech, is 61 and carries the install knowledge in his head. The counter is strong on product and weak on follow-up: 38 open quotes from the last 60 days have no next step on them.

This is a Building-stage shop with a Legacy Owner profile. The revenue is real. The structure under it is not keeping pace. Dan wants to be out of the bays inside two years and would like the option to sell inside seven. The 90-day goal is to change the trajectory on both.

2. Ghost bottleneck

The surface symptoms are margin erosion, a quoting bottleneck and a counter that does not chase. The root is the same in all three: there is no operating system under the shop. Pricing lives in Dan's head, so nobody else can price a job. Job margin is unknown until the accountant closes the year, so there is no feedback loop to correct pricing in season. Quotes have no owner after they are handed over, so the follow-up is whoever remembers. Rick's install knowledge is undocumented, so the shop's capacity to do its best work has a single point of failure.

Everything traces back to one fact: the shop was built around Dan's judgment, and that judgment was not written down as a system. That made it fast to build and fragile to own. The bottleneck is not Dan's decisions. It is the absence of the structure that would let anyone else make them.

3. Quantified opportunity

All figures are annual. Exact numbers from the engagement documents are used where available (the P&L, the price sheet, distributor statements, the open quote list). Estimates are labeled, and the assumption behind each one is stated so you can argue with it.

Lever 1: Labor rate and discount discipline **FM06**

Billed labor last year: 1,900 hours at \$95, or \$180,500. Moving the rate to \$120 on new quotes is \$25 an hour on the same hours, \$47,500 a year, and it flows almost entirely to profit because no extra cost is incurred on work already being done. The county benchmark supports \$120 to \$135; \$120 is the conservative figure.

Separately, the courtesy discount. Retail accessory revenue is \$1.1M. If three tickets in ten carry 10% off, the leak is about 3% of retail, \$33,000. A written discount rule with a dollar limit at the counter recovers most of it; we count \$30,000.

Combined sell-side lever: \$47,500 to \$77,500 a year, with the realistic middle case near \$62,000 once some rate resistance is allowed for.

Lever 2: Distributor terms and freight **FM06**

Parts spend is \$640,000 across two distributors, with no volume program on either and freight paid on roughly 60% of orders because they go out as they are written up. Consolidating to two order days a week and asking both reps for the volume tier is a 3% to 5% improvement on the spend, \$19,200 to \$32,000. This is the usual range for a shop at this volume with no prior negotiation; it does not require changing distributors.

Lever 3: Comebacks and rework **FM08**

Thirty-eight comebacks last year, mostly wiring, leveling kits and bed covers, at an estimated \$350 to \$900 each in labor, parts and goodwill. At the \$625 midpoint that is \$23,750. A pre-delivery check sheet and a parts landed check before boxes go on the shelf typically halve that: \$11,900 a year. This is an estimate from the owner's own count.

Lever 4: Quotes that went quiet **FM07**

The counter writes about 60 quotes a month at an average of \$1,400 and closes about 45%. Nobody owns a quote after it is handed over. A named follower and a follow-up at 48 hours and 7 days moves close rate 5

points at a shop like this, which is 3 more jobs a month: \$50,400 in revenue and, at Ridgeline's 44% gross margin, about \$22,000 in gross profit a year.

Lever 5: The past customer list FM10

There are 2,800 customers on file and none have been contacted since their install. A seasonal message (the winter tire swap, the spring lift, the bed cover before the rains) to that list typically brings 2% back at the \$1,000 average ticket: \$56,000 in revenue and about \$25,000 in gross profit a year. The list is the asset the shop already paid for.

Lever 6: The calls that do not get answered FM09

Dan's count is four missed calls a week during busy stretches and after close, and he believes one in four was somebody ready to buy. At the \$1,000 ticket that is \$52,000 in revenue a year, about \$23,000 in gross profit, before counting the customer who did not call back. This is the owner's own figure; treat it as the ceiling for this lever. An AI employee that answers in the shop's name and texts back the ones that hang up is the mechanism; the AI-ROI Assessment puts the implementation cost against it.

Lever 7: Key-person risk FM05, FM12

Rick carries the lift and wiring knowledge and is two or three years from slowing down. This is a risk to document, not a dollar to recover. If his install standards are not written before he reduces hours, the cost shows up as comebacks and a six-month hiring gap. Named in the exit-readiness step below, because a buyer discounts a shop whose best work depends on one technician.

Lever	Annual estimate	Basis
Labor rate and discount discipline	\$47,500 to \$77,500	1,900 billed hours, \$95 to \$120; written discount rule on \$1.1M retail
Distributor terms and freight	\$19,200 to \$32,000	\$640K spend, 3% to 5%, two order days a week
Comebacks and rework	\$11,900	38 comebacks at a \$625 midpoint, halved
Quotes that went quiet	\$22,000 gross profit	60 quotes a month, close rate up 5 points, 44% margin
Past customer list	\$25,000 gross profit	2,800 customers, 2% respond, \$1,000 ticket
Calls that do not get answered	\$23,000 gross profit	Owner's count, four a week, one in four a buyer
Total identified opportunity	\$148,000 to \$191,000 a year	Mid case about \$170,000, 9% of revenue

The labor rate and the distributor conversation alone are worth \$67,000 to \$110,000 and can start in week one with no software and no new hire.

4. Phase 1: Stabilize (days 1 to 30)

Goal: stop the margin bleed, take the two fastest cash levers, and get one person at the counter one step closer to sending quotes Dan does not touch.

Step 1.1: Write the rate card **FM06**

OWNER ONLY. THIS CANNOT BE DELEGATED UNTIL IT EXISTS

Dan writes down his pricing logic for the six most common job types: leveling kit, 4 to 6 inch lift, tonneau cover, wheel and tire package, lighting and wiring, and the bed liner and step combination. For each, the labor hours, the labor rate, the parts markup floor and the adjustments (older truck, aftermarket already fitted, customer-supplied parts). It does not need to be pretty. It needs to exist on one page so Marcy at the counter can quote from it.

The new labor rate on the card is \$120. Existing sold jobs are not repriced.

Decision point. Before the card goes live, Dan and Marcy price five real jobs side by side. Any gap over 8% is a conversation about where the assumption diverged. The goal is a baseline Marcy can defend, not perfection.

Owner time: 4 to 6 hours across two sessions.

Step 1.2: Two order days and one phone call per distributor **FM06**

OWNER STARTS IT. MARCY PULLS THE STATEMENTS

Pull twelve months of statements from both distributors. Sort by category. Call each rep with the annual figure and ask two questions: what volume tier the shop sits in, and what it takes to reach the next one. Then move ordering to Tuesday and Thursday so freight is paid on consolidated orders, not on every write-up.

Decision point. If one distributor offers a tier the other will not match, shift one category, not the account. Test quality and lead time on five orders before moving more.

Owner time: 2 to 3 hours including the statement pull.

Step 1.3: A discount rule with a dollar limit **FM03, FM06**

OWNER DECIDES. COUNTER EXECUTES

Written on one line and taped under the counter: Marcy may take up to \$75 off a ticket over \$1,000 to close it, once, and logs it. Anything beyond that comes to Dan. The courtesy 10% ends. This is the authority Dan has been granting verbally for years, written down so it stops being a guess.

Decision point. Thirty days in, count the discounts in the log. If more than one ticket in ten carried one, the rule is being used as a habit, not a tool, and the conversation is about closing skill, not the limit.

Owner time: under an hour.

Step 1.4: Every open quote gets a name and a date **FM07**

DELEGABLE TO MARCY

The 38 open quotes from the last 60 days go on one board with a follower and a next-contact date. New quotes get both at the moment they are written. Follow-up is a text at 48 hours and a call at 7 days, from the same person. Nothing fancy. The point is that a quote has an owner after it leaves the counter.

Decision point. Day 30, count the quotes closed from the board. If fewer than three of the 38 came back, the problem is the quote itself (price, clarity, options), not the follow-up, and Step 2.1 moves up.

Owner time: one conversation to set it up. Marcy owns it.

Step 1.5: Rick writes the three install standards that live in his head FM08

DELEGABLE TO RICK WITH DAN'S REVIEW

This month Rick writes, in plain language, how the shop does three things: a lift from write-up to alignment, a wiring job from harness to test, and the pre-delivery check before keys go back. One page each. Not a manual. Enough that a new tech could follow it without pulling Rick off a truck.

Decision point. Dan reads each page and marks the judgment calls only Rick or Dan can make today. Those are the gaps that Step 2.4 addresses.

Owner time: one conversation to start it, one review at month end.

5. Phase 2: Build (days 31 to 60)

Goal: install margin visibility by job type, get Marcy quoting the standard jobs on her own, and start the comeback routine.

Step 2.1: Margin by job type, three numbers a ticket FM06, FM09

OWNER DESIGNS. MARCY AND RICK CAPTURE

For the next 40 tickets, at close, Marcy records three numbers: parts cost as landed, labor hours as booked, and whether the job came back. Rick supplies the hours. A column in the existing spreadsheet is enough. After 40 tickets Dan has real margin by job type for the first time, instead of "lifts are good and tonneaus are thin" from memory.

Decision point. If the data shows wheel and tire packages running under 30% after labor, that informs whether to reprice them, push them to the distributor's drop-ship program, or stop leading with them.

Step 2.2: Marcy sends three job types without Dan's review FM03, FM07

OWNER DECIDES. COUNTER EXECUTES

Define the three job types where the rate card is enough and Marcy's authority is complete: leveling kits, tonneau covers, and step bars and bed liners. Marcy sends those quotes. Dan does not see them first. Dan reviews outcomes weekly: close rate and margin, not individual quotes. Lifts, wiring and anything custom still come to Dan.

Decision point. Week 6, pull Marcy's close rate and margin on the three types. Inside 10% of Dan's own, the boundary widens to include lighting. Outside it, a calibration session against the rate card before widening.

Step 2.3: The comeback routine FM08

OWNER SETS THE THRESHOLD. RICK RUNS IT

Every comeback gets logged with the job type, the tech and the cause. The pre-delivery check sheet from Step 1.5 becomes mandatory on lifts and wiring. A parts landed check when boxes arrive (right part, right side, no damage) stops the comeback that starts on the shelf.

Decision point. If a single cause accounts for more than a third of comebacks in 30 days, that is the step to fix, not the tech.

Step 2.4: Written authority for Marcy and Rick **FM03**

OWNER DESIGNS. TEAM WORKS INSIDE IT

Marcy approves parts orders for sold jobs that match the write-up, and discounts inside the Step 1.3 limit. Rick calls the redo on his own work and approves a parts substitution of equal grade. Anything outside those lines comes to Dan. This is the written version of what the team already does when Dan is in a bay. Once it is written, they stop second-guessing whether they have it.

Decision point. Two weeks in, list every decision that still came to Dan. If more than one in five was inside the written boundary, the team needs a calibration conversation, not a wider boundary.

Step 2.5: The first message to the list **FM10**

DELEGABLE, WITH DAN ON THE COPY

Export the 2,800 customers. Clean the obvious (duplicates, bad numbers). Send one seasonal message, by text and email, with one offer and one way to reply. Measure who answers. This is the first time the shop has worked the asset it already owns, and it is the test for whether reactivation deserves a campaign every quarter.

Decision point. Under 1% response: the offer or the list is the problem, test a second message before judging the channel. Over 2%: schedule the next three seasons now.

6. Phase 3: Transfer (days 61 to 90)

Goal: Marcy runs standard quoting on her own. Dan has monthly margin by job type. Rick's knowledge is on paper. Exit readiness is started.

Step 3.1: Standard quotes go out without Dan **FM03, FM07**

DELEGABLE. THIS IS THE PROOF POINT

By day 90, Marcy sends quotes on the Step 2.2 job types without Dan's prior review, and lighting is added. Dan reviews outcomes in a 30-minute weekly session: close rate, margin, patterns. This is not the full handoff of quoting. It is the first bounded piece, where Dan's involvement is after the fact rather than before.

Decision point. Over 20 or more quotes, if Marcy's close rate is within 10 points of Dan's, widen again. If not, name the gap: pricing (rate card), presentation (the quote itself) or closing (a skills problem, FM07 work).

Step 3.2: The first margin report by job type **FM06**

MARCY GENERATES. DAN INTERPRETS

After 40 tracked tickets, Marcy produces one summary: revenue, landed parts, labor hours and margin by job type. This is the first data-based answer to which work the shop should chase and which it should price up or decline. It also sets the baseline the day-90 follow-up call measures against.

Step 3.3: Rick's standards become the shop's standards **FM05, FM08**

OWNER ONLY ON THE DECISION

The three pages from Step 1.5 are now the install standard, used to onboard the next tech. Dan and Rick agree what Rick's role looks like at three days a week and when, and what has to be on paper before then. This is a continuity plan, not an exit plan for Rick, and Rick helps build it.

Decision point. "Sometime in a couple of years" is not a plan. A month range is. That conversation happens before day 90, because the documentation cannot start until Dan knows what he is planning for.

Step 3.4: The buyer's folder, started FM12

OWNER ONLY

Dan wants the option to sell inside seven years. A buyer pays for a shop that runs without the owner, has its numbers, and has repeat business on paper. By day 90 the folder has the rate card, the written authorities, the margin report, the install standards and the customer list with its first response rate. That is four of the eight value drivers started in one quarter.

7. 90-day proof

On day 90 the following are true. These are the minimum conditions for the plan to have worked.

- A written rate card exists for the six primary job types, at \$120 labor. Marcy quotes from it.
- Marcy has sent at least 15 quotes on the standard job types without Dan's prior review.
- Both distributor reps have been asked about volume tiers, and ordering runs on two days a week.
- A written discount rule with a dollar limit is in use and logged.
- Every open quote has a named follower and a next-contact date, and the 48-hour and 7-day follow-up runs.
- 40 or more tickets carry landed parts, labor hours and comeback status. Dan has seen the first margin report by job type.
- Written authority exists for Marcy and Rick, and each can describe it without asking Dan.
- Rick's three install standards are on paper and the pre-delivery check is in use on lifts and wiring.
- One message has gone to the customer list and its response rate is known.
- The buyer's folder exists with its first four items.

8. Where this plan typically breaks down

Three patterns end plans like this one at this stage, and all three are predictable.

Dan re-approves the quotes Marcy was given. The authority transfers on paper; then Marcy sends a quote Dan would have priced differently, and Dan calls her before it goes out, or adjusts the ticket after. Both teach Marcy the boundary is not real, and within three weeks everything is back on Dan's desk. The fix is not willpower. It is a 30-day commitment to review outcomes, not quotes. Dan can tell Marcy after the fact that a quote was low. He cannot see it first without collapsing the transfer.

The three-number tracking dies in week six. Spring hits, the bays are full, and the column stops getting filled because nobody is asking for it. Keep it to three numbers, and have Dan ask for the running summary every two weeks. When the owner asks, it gets done.

The Rick conversation gets deferred. It is uncomfortable because Rick has been there since the shop opened and the relationship is personal. It gets pushed to after the busy season, and then again. By the time

Rick slows down, nothing is written and the next tech learns by comeback. The conversation needs to happen before day 90, because the documentation cannot start until Dan knows what he is planning for.

9. What direct engagement adds

Decisions centralized on the owner. Every call at Ridgeline routes to Dan because the team has learned that decisions come back to him anyway, so waiting is rational. Breaking that takes FM03 and FM04 together: authority in writing, then a weekly rhythm where Dan refuses to re-decide what he has assigned. The first 30 days are uncomfortable. By day 60 the team stops bringing him decisions they own.

Underpriced, and discounting out of habit. The distributor increases were eaten because Dan did not feel he could go back to the customer. At Ridgeline's margin structure most of a deliberate rate increase flows straight to profit. The judgment call is not whether to raise the rate. It is how to sequence it so the right jobs absorb it and the price shoppers select themselves out.

The list nobody works. 2,800 customers who already trust the shop and have not heard from it since the install. The judgment call is which season, which offer and which message, and what to do with the 2% who answer. That is pattern recognition from shops that have done it, not a math problem.

Direct engagement means those judgment calls get made with someone who has seen this combination before. Your three months of Force Multiplier carry this roadmap, the 12 Shop Systems and Nestor, your strategic AI partner, so the plan lives where you run the shop. For the first month after the review you can email or text us as often as you need, and at day 90 we meet again to measure what moved.

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