Robin Hayhurst
CONSTRUCTION INDUSTRY MENTORING

CONSTRUCTION BUSINESS
HEALTH AUDIT REPORT

Prepared for

Sarah Brennan

Brennan Joinery & Interiors Ltd, Bedford

Audit conducted by

Robin Hayhurst BSc (Hons) MCIOB

Construction Industry Mentor • Robin Hayhurst Construction Industry Mentoring Ltd

Audit call: October 2026 • Report issued October 2026

SAMPLE REPORT: every name, figure and quote in it is invented

Personal opening

Hello Sarah,

Thanks for the hour this morning, and for having the questionnaire back to me before the call. It meant we could spend the time on your business rather than on form filling. I've been back through the recording and your answers, and this is what I found. It's written about you and Brennan Joinery, and about what I think will change things most over the next ninety days.

I want to start with what you said when I asked what would have to change to take your 6 out of 10 up to a 10.

> *"I'd like to walk out of the workshop on a Friday and not think about it until Monday. At the moment I know roughly what everything costs, roughly who owes me, roughly what's coming up. It's all roughly, and it's all in my head." And then: "I'd love to know, before a job finishes, whether we've actually made any money on it."*

That's the whole report in two sentences. Knowing where you stand, and knowing it before it's too late to do anything about it. You already know what's missing. What you haven't had is anyone showing you how to put it in place, and that's what this report is for.

Before any of the hard stuff, look at what you've built. Nine years ago you left a workshop manager's job with a van, a bench and two clients. You now turn over about £1.3 million a year, with eleven people, a workshop that clients are proud to be shown round, and three of your last five clients coming back for a second job. You've done that on the strength of your craft and your reputation, with no job costing, no forecast and no written processes. Very few people get that far without the systems. It also means you're carrying the whole thing yourself, and that's where it has started to creak.

You'll see a fair amount of red in this report. Don't take it personally. Labour allowances, retentions, a cash flow forecast, the difference between markup and margin: you told me straight that you'd never been shown some of them, and that's fine. Nobody teaches joiners this. You learned to make things beautifully and to look after clients. Running the money and the systems behind it is a different trade, and it can be learned a lot faster than cabinet making.

Robin

The short version

If you read one page of this report, read this one.

The diagnosis, in a sentence

You run a £1.3 million business the way you'd run a £300,000 one: prices from experience, cash checked by the bank balance, and every decision coming back to you.

How you lead

Task 6, People 7 on the Blake-Mouton grid. You care about your team and it shows, but you avoid the hard conversations, so small problems stay small problems for too long. And because the numbers aren't shared, the team can't help you fix them.

The scorecard

Four red, five amber, three green. None of the reds is about whether you can make beautiful joinery. Every one of them is about measuring, writing things down or handing things over.

The three that matter

1. Knowing what a job makes. Prices come from experience and a good feel for the work, with no record of estimated cost against actual cost. On your last kitchen and staircase job, labour ran about 18% over what you allowed, and you only found out by looking back.
2. Cash. No forecast, retentions not tracked, and two clients paying late at the same time. You find out about a tight month when you're in it.
3. Getting it out of your head. No written programmes, no written job descriptions, and a foreman who can't spend or decide anything above small purchases without ringing you.

What it is probably costing you

Nobody can put an exact figure on it, because nothing is measured, and that's the point. What we do know: an 18% labour overrun on one job, about £21,000 of retentions sitting unchased across four jobs, and around fifty-five hours a week from you to hold it all together. If the labour overrun is typical across a year, it's a five-figure sum. I can't prove that from one call, but it's the first thing to measure.

What to do first

Start a simple weekly cash sheet this month: what's coming in over the next eight weeks, job by job, and what's going out. That's the whole of action one.

What is in the rest of this report

- Your DiSC profile: what it is, and your result
- The scorecard: twelve areas, RAG-scored, with the chart
- Detailed observations on each of the twelve
- Your leadership style: the Blake-Mouton grid and where you sit on it
- The three priorities: what I heard, why it matters, what good looks like
- Your 90-day plan: six actions, dated
- Where this goes next: your options

Your DiSC profile

DiSC is a way of describing how you naturally behave, particularly under pressure. There are four letters.



D is the Driver, who pushes hard, decides fast and gets things done. I is the Influencer, outgoing and persuasive, who wins people over. S is the Steady one, patient and loyal, who holds the team together. C is the Checker, who reads the contract, runs the numbers and builds proper systems.

Most people are a blend of two. It isn't a label and it isn't fixed. It matters because the way you're wired shapes how you run the business, how you manage people, and how you'll get the most out of the mentoring.

Your result: Checker, with a strong Steady second

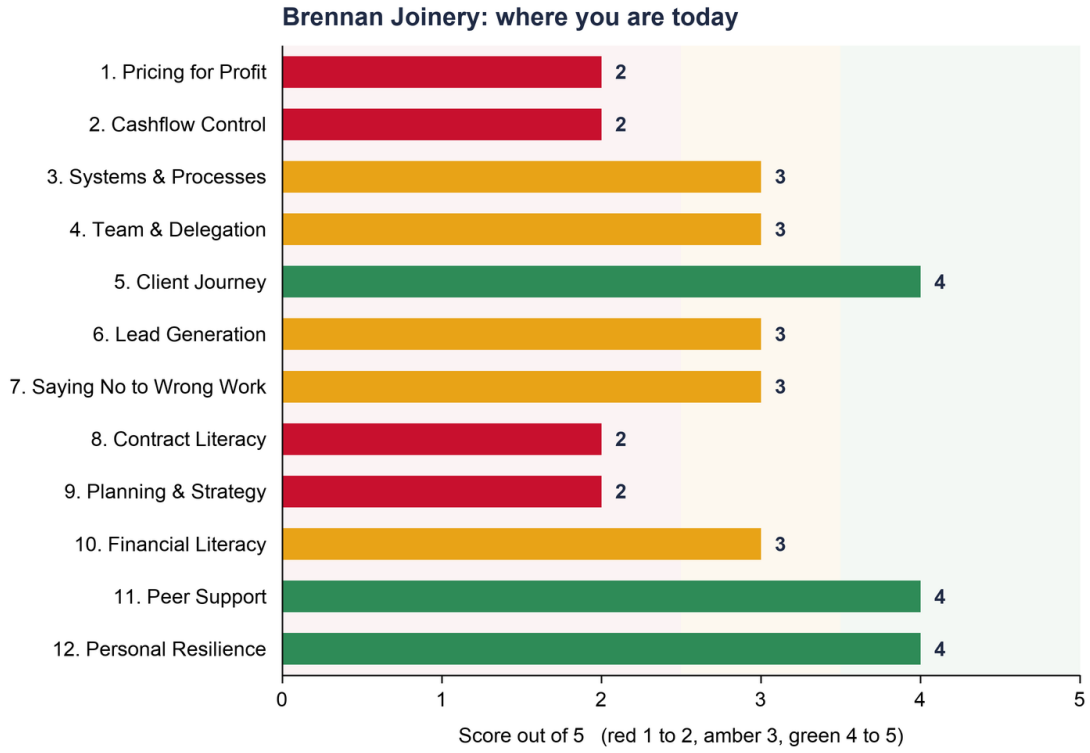
You scored highest on C (the Checker) and S (the Steady one), with D (the Driver) in the middle and I (the Influencer) lowest. That's a careful, high-standards, loyal-to-the-team profile, and it fits what I saw on the call.

The strength is the quality of your work and the way your team trusts you. The cost is that you check everything yourself because nobody else will do it to your standard, and you'd rather do a job again than have an awkward conversation about it. That's why everything ends up with you.

One thing to keep in mind: DiSC describes how you tend to behave, not what you're capable of. If you want to be more Driver on the days it matters, such as chasing money or saying no, that's a habit you can build, and the 90-day plan has a few of them in it.

The scorecard: twelve areas

Below is where you are today across the twelve areas we work on. Scores are 1 to 5, RAG-coded. Red is 1 to 2, amber is 3, green is 4 to 5. The chart first, then the table, then the detail.



Area	Score	RAG	One-line summary
1. Pricing for Profit	2	RED	Prices come from experience and are usually right on materials, but labour runs over and nothing is checked afterwards.
2. Cashflow Control	2	RED	No forecast. Cash checked by the bank balance. Retentions not tracked and two late payers at once.
3. Systems & Processes	3	AMBER	Orders and cutting lists are tidy. Programmes, snagging and job costs live in your head.
4. Team & Delegation	3	AMBER	Good, loyal people. No written roles, no reviews, and your foreman can't decide much without you.
5. Client Journey	4	GREEN	Clients are looked after well and say so. Not written down, but it works, and it brings repeat work.
6. Lead Generation	3	AMBER	Steady work from repeat clients and two architects. Reliable, but you have no control over it.
7. Saying No to Wrong Work	3	AMBER	You turn down the odd job, but you took on a kitchen you had doubts about and paid for it in time.
8. Contract Literacy	2	RED	Quotes with standard terms. No signed contract on smaller jobs, and variations agreed by text.
9. Planning & Strategy	2	RED	You know what you want, but there's no written plan and no time set aside to work on the business.
10. Financial Literacy	3	AMBER	You know your turnover and your wages. Overhead, margin and job profit are estimates.
11. Peer Support	4	GREEN	A trade association group and a mentor from your old firm. A real strength.
12. Personal Resilience	4	GREEN	You sleep well and take proper holidays. The strain is the hours:

			about fifty-five a week.

Before you look at that and feel sick

Four reds in twelve is better than most. Read it properly. It isn't four problems, it's one problem in four places: the business runs on your memory, so nobody else can run it and nobody, including you, can see the numbers. You've got the craft, the clients, the team and the turnover. Put the structure underneath and most of those reds move together.

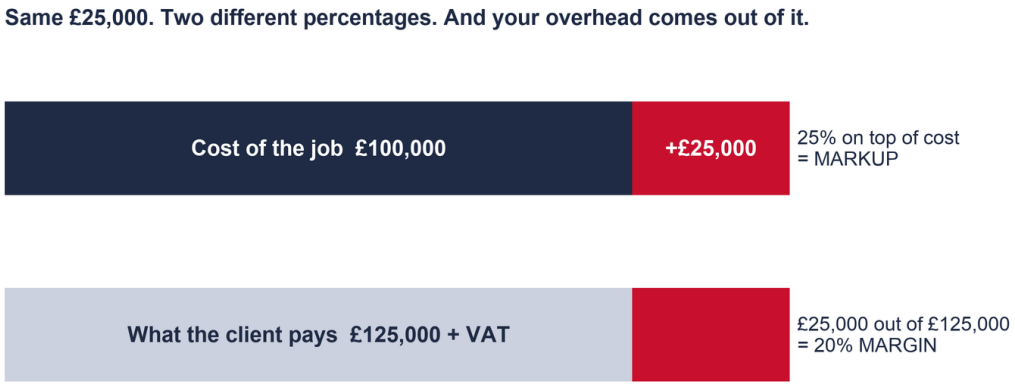
Detailed observations

1. Pricing for Profit: 2/5 (Red)

There's a lot that's right here. You visit every job before you price it, you know your materials down to the screw, and your prices are rarely wrong on what goes into the workshop. That's more discipline than most people I audit, and it's why clients trust your quotes.

The gaps are on the labour side. Time for making and fitting is estimated from experience, there's no record afterwards of what it actually took, and so the same underestimate gets repeated. You told me the last kitchen and staircase job “felt tight”, but you couldn't say by how much. When we worked it through roughly, labour had run about 18% over. Installation days, second visits and waiting for other trades aren't separated out, and your own time spent designing and project managing isn't charged at all.

None of that means you're pricing badly. Your work is in demand and your clients pay for quality. It means you can't see which parts of a price work and which leak, and as the jobs get bigger the leaks get bigger too.



One more thing on your 25%. That's a markup, not a margin. Put 25% on £100,000 and you charge £125,000, but your £25,000 is only 20% of the price. Your accountant will talk in margin, so you need to know which one they mean. And your overhead comes out of that 20p in the pound, not on top of it.

2. Cashflow Control: 2/5 (Red)

Your cash is healthy today, and that's partly why it hasn't been a priority. Asked where you'd be in eight weeks, you said “fine, I think”, and then listed four things that could go wrong. You have about £21,000 in retentions across four jobs that nobody is chasing, and two clients are currently thirty and forty-five days late.

You were straight with me about why. You've never had a bad cash year, so you've never needed to look ahead. You said: “It's always come right in the end.” It has, and that's the risk. The month where two large timber orders, a VAT payment and a late-paying client land together is the one that catches people who have never had one.



The fix is to see it coming. Out of every £120 a client pays, £20 belongs to HMRC before you've bought a single board. Keep VAT somewhere separate and the quarterly bill stops being an event. Then build a simple eight week cash sheet, updated every Monday, so a tight month shows up weeks before you're in it.

Stage payments help here too. Where a job runs for months, such as a full kitchen and stairs package, agree a deposit, a payment on delivery of materials and a payment on completion, and put them in the quote. Otherwise you're funding the client's project out of your own account.

3. Systems & Processes: 3/5 (Amber)

Where would I find the snagging list for a live job? “In my head, mostly. Hannah types it up if I remember to tell her.” Cutting lists and orders: neat, on a spreadsheet, and accurate. Written programme: a whiteboard in the workshop that's out of date by Wednesday. Budget against actual: no. Who goes where next week gets sorted by talking to people.

That's a better starting point than most. Your workshop side is well organised, which is why quality is high. The weak spot is everything that happens after the drawings are signed off: who is on which job, what has been ordered, what's been agreed with the client, and what the job has cost so far. Right now you're the system that connects them.

You said you're “not a spreadsheet person”. You don't need to be. You asked whether AI could turn your site notes into a snagging list and your measurements into a cutting list. It can, and I'll show you how. You can type, or just talk into your phone, in plain English.

4. Team & Delegation: 3/5 (Amber)

You've got eleven people, and they're good ones. Your foreman Declan has been with you six years, and your apprentice Tyler is coming on well. You said: “They'd walk through a wall for me.” I believe it. But when I asked what Declan could decide without ringing you, the answer was “up to about a hundred pounds of materials, and nothing else”.

There are no written job descriptions, no reviews, and nobody is being prepared to step up. You told me you'd rather do something yourself than have a difficult conversation about it being done wrong. That's kind, and it's expensive. Your people can't grow into more if everything above small decisions comes back to you.

My advice is to hold off on hiring a site manager for now. The gap isn't headcount, it's decision-making. When I asked what you could hand over tomorrow, you said ordering and chasing suppliers. That's the first thing to move. We'll write down what Declan and Hannah can decide on their own, with a spending limit, and when you do hire, you'll have a system for them to step into.

5. Client Journey: 4/5 (Green)

This is a real strength. You meet every client at the start, you sit down with them at the design stage, and you call them on the day the job is finished to check how it's gone. Three of your last five clients came back. One of them told you: “You're the only tradesperson who's ever done what they said they'd do.” That doesn't happen by accident.

It's a four rather than a five because it's all in your manner and none of it is written down. If you're ill, or Declan is running the job, the client gets a different experience. A one-page description of what the client can expect, from first meeting to final call, would protect what you've built and make it easy for others to deliver.

It also gives you something to put in front of new clients. You haven't got a brochure. A simple one, with your process in it and you in it, would help you win more of the kind of work you want, and it can be a quality PDF.

A word of caution on the strength itself. Because you're so good at looking after clients, you tend to absorb their changes without charging for them. A good journey includes a clear, friendly way of pricing variations before the work is done.

6. Lead Generation: 3/5 (Amber)

You're not short of work. Repeat clients, two architects who send you good projects, and a few referrals from a kitchen showroom. About 70% of your work comes from repeat clients and those two architects. Plenty of joiners would swap with you.

Two things stop this being green. First, it's all passive. If both architects went quiet for a quarter, you'd have no way of replacing the work. Second, you haven't asked your happy clients for reviews or referrals, even though you have the proof that they're happy. Your website has four photographs and no testimonials. The way to build control is to make it easy for the people who already love your work to tell others about it.

7. Saying No to Wrong Work: 3/5 (Amber)

Jobs turned down in the last year: “two or three.” That's more than many owners. But you told me about a kitchen last spring where you had doubts at the quote stage, “the client wanted everything yesterday and kept changing the drawings”, and you took it on anyway. It cost you about three weeks of extra design time, which you didn't charge for, and a final payment that took two months to arrive.

You'd say no more often if you had a simple set of questions to ask before you quote: does the client have a realistic budget, are they decisive, and do they pay on time? Three honest answers would have flagged that job. I'll give you a one-page checklist. And if you ever do need to come down on price, do it by changing the specification, not by cutting the price for the same work. A discount tells the client your first price was soft.

8. Contract Literacy: 2/5 (Red)

Larger jobs go out with proper terms and a deposit. Smaller ones go out as a quote and an email, and some work starts on a handshake. Variations are agreed by text message and sometimes never written down at all. That's how a job that should have made money ends up making less.

The other gap is retentions. You told me you weren't sure which of your clients had a retention clause or when it falls due. About £21,000 is sitting out there and nobody is tracking it. A one-page contract summary for every job, with payment dates, retention terms and the process for variations, fixes most of this. You don't need to be a lawyer. You need a checklist.

9. Planning & Strategy: 2/5 (Red)

In three years you want a business that turns over £2 million, with you running it rather than making it. But there's no written plan, and you told me you've never taken a full day, or even a morning, to work on the business rather than in it. Quoting and designing is working in it.

That's why the five-year plan is a priority. Everything else hangs off it: who you need, what turnover, what size of job, and when you can stop being in the workshop every day.

10. Financial Literacy: 3/5 (Amber)

You know your turnover, your wages and your bank balance. Overhead for a year: “About £150,000, I think.” Margin on your best job: “Good, I'd say.” Management accounts: your accountant sends them quarterly and you look at the top line. I'm not listing these to embarrass you. You're nearer than you think, and it's a short step from knowing the numbers to using them.

A few things to get straight. We never include VAT in turnover: it comes in and goes straight out, so £500,000 plus VAT is £500,000. Your workshop costs and your site costs need to be split, so a job isn't charged for rent it doesn't use. And year-end accounts tell you about a business that no longer exists. What you need is a simple monthly report from your accountant or bookkeeper, and we'll set out what goes in it.

11. Peer Support: 4/5 (Green)

Who do you talk to about the business? “My husband, bless him, and a group of other makers through the trade association. We meet every couple of months.” You also still ring the owner of your old firm, who has been in business for thirty years.

That's good, and it matters more than people think. The gap is that none of those people see your numbers, so the advice you get is about how you feel and not about what the figures say. A group of owners who've had your exact week, and where you can open your numbers up, is the natural next step.

12. Personal Resilience: 4/5 (Green)

You sleep well, you took two proper holidays this year, and you run most mornings. That's more than most owners manage. The pressure is the hours: about fifty-five a week, most of it quoting, designing, ordering and chasing. You said: “I'm fine until I'm not, and then I'm very much not.” That's a good thing to notice early. A business that only works if you work fifty-five hours isn't one you can step away from.

Your leadership style

This section uses the Blake-Mouton Leadership Grid. It's a model from the 1960s that has lasted because it's honest and simple. It plots how you lead on two axes: how much you push for the task (getting the job done, the programme, the margin) and how much you invest in the people doing the work (their welfare, their development, their voice in the business). Each runs from 1 to 9.

Where you land puts you near one of five styles. Bottom-left (1,1) is Impoverished: surviving, not leading. Top-left (1,9) is Country Club: lovely bloke, business is a mess. Bottom-right (9,1) is Authority-Compliance: tight programmes, burnt-out team. The middle (5,5) is Middle of the Road: competent, plateaued. Top-right (9,9) is Team Leader: engaged team, profitable jobs.

Your scores

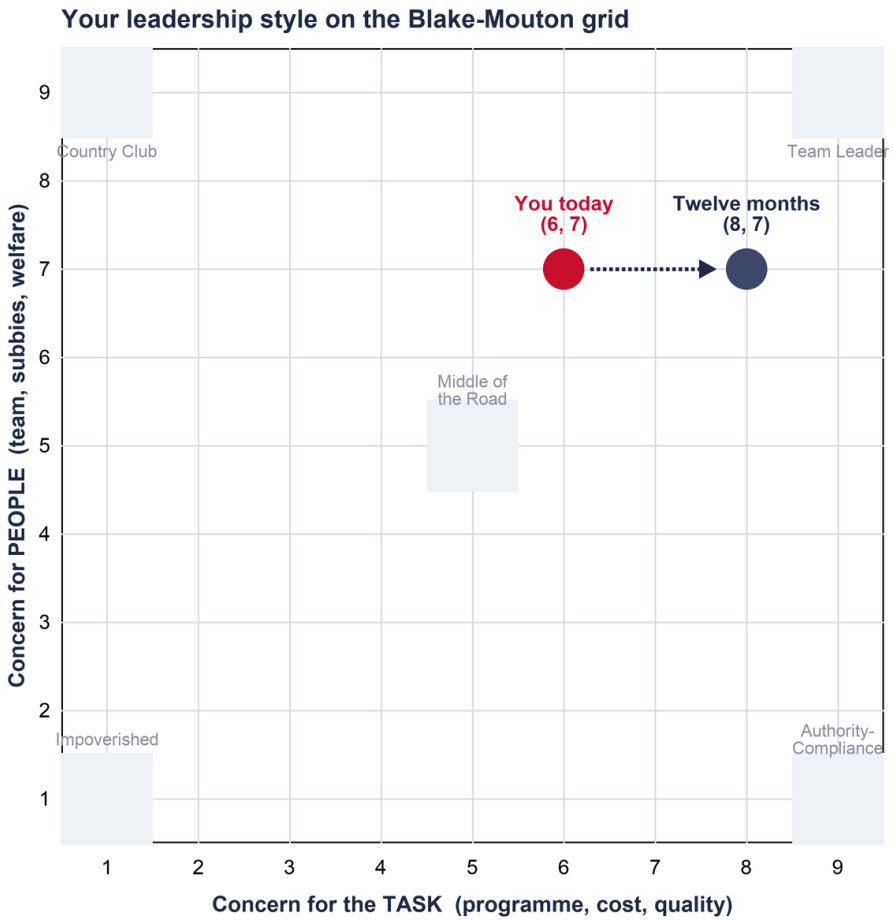
Concern for Task (Q33 to Q41): raw 29 of 45, which puts you at 6 on the grid.

Your best answer was keeping programmes tight in the workshop (5). The weakest were checking cost against estimate and feeding job results back into the next price (both 2). Everything else sat at 3 or 4.

Concern for People (Q42 to Q50): raw 34 of 45, which puts you at 7.

Your highest answers were knowing what each person wants from the job and providing the right kit and welfare (both 5). The lowest were having difficult conversations about performance early, and sharing how the business is doing (both 2).

Your position on the grid: (6, 7)



You're people-first, with a good grip on the task in the workshop but a weaker one on the commercial side of it. Ideally it's closer to level. I don't want to pull you away from your people, just add more of the numbers and the straight talk.

How this shapes how you manage today

It fits everything you told me. Your team trust you and stay, and you look after them. But they don't hear how the business is doing, so they don't know why a late payment matters. Problems that need a firm word get put off. Nobody is being developed into the person who could take a job off you. And you check everything yourself because you care about the standard.

There's real strength in there too. You told Tyler in front of the client that his finish was the best on the job. That's exactly right. Do more of it, on purpose, and add the harder conversation alongside it.

The three habit changes, and where they should take you

1. Every Monday, ten minutes with Declan: where each job is, what's next, what's going wrong. He brings it to you before the client does.

2. Once a month, tell the whole team how the business is doing. Not the bank balance, just whether work is coming in, what's coming next, and where you need their help.

3. Pick one thing a month where you say the difficult thing early, kindly and in private. Small problems stay small when they're said out loud.

Do those for twelve months alongside the task work in the 90-day plan, and I'd expect you around (8, 7). A business that runs on its system, and a team that knows where it stands.

The three priorities

Of the twelve areas, these are the three to fix between now and Christmas. The others matter, but these three unlock them.

Priority 1: Know what every job makes

What Robin heard

“It felt tight, but I couldn't tell you by how much.” “I know what the timber costs, it's the hours I get wrong.” Labour on the last kitchen and staircase job: about 18% over. Estimated against actual: “Never. I'd have to dig it all out.” Charging for design time: “Not really, no.”

Why it matters

Labour is the biggest unknown in a joinery price and the easiest to get wrong. If the same 18% overrun runs through most of your jobs, it's a five-figure leak every year, and you can't take on bigger projects safely until you know. It also means your best work and your worst work look the same on paper.

What good looks like

A simple record for every job: estimated hours and cost against actual hours and cost, by stage (design, making, fitting). A closing sheet at the end of each job with one line on what went differently. A labour allowance that reflects what jobs really take, and a separate charge for design and project management time. After six jobs, your next price is better than your last.

Priority 2: See your cash coming

What Robin heard

“Fine, I think.” “It's always come right in the end.” Retentions: “About twenty grand out there, I suppose.” Two clients currently thirty and forty-five days late. Forecast: “I just look at the bank.”

Why it matters

A good business can get into trouble in a good year if the cash lands in the wrong order. You've never had that month, and that's exactly why it's worth building the early warning now. Retentions and late payers are also money you've already earned. Chasing them costs nothing and funds the rest of the plan.

What good looks like

A separate VAT account that you move money into every time a payment lands. A one-page cash sheet, updated every Monday, looking eight weeks ahead. A retentions list with amounts and due dates, reviewed monthly. A friendly but firm routine for chasing late invoices, starting the day after the due date. Over time, a reserve that covers a month of wages and overheads.

Priority 3: Get the business out of your head

What Robin heard

“Up to about a hundred pounds of materials, and nothing else.” Snagging list: “In my head, mostly.” Programme: “The whiteboard's out of date by Wednesday.” Hours: “About fifty-five.” And on handing over ordering: “I'd love to, but nobody does it the way I do.”

Why it matters

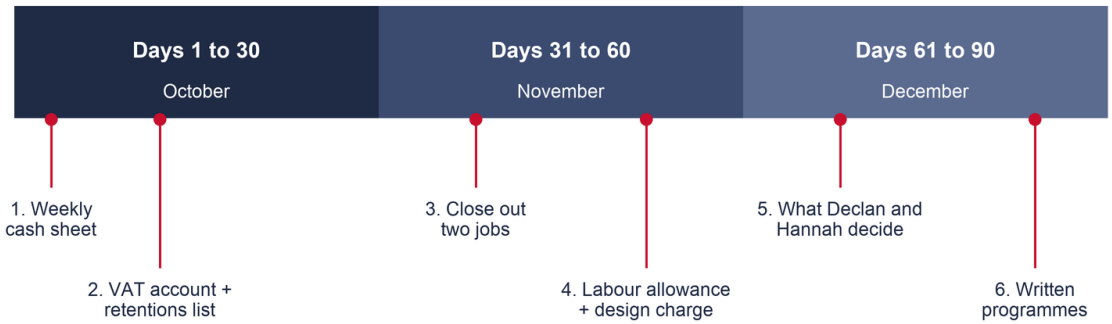
At eleven people and a growing order book, you're near what one head can hold. That's the ceiling. Most owner-led firms meet it somewhere between £1 million and £2 million, and the ones that get through it put the processes in first, then the people. You want to run the business, not make every part of it. That only happens if the business can decide things without you.

What good looks like

A written programme for every live job, updated weekly. A one-page job description for Declan and one for Hannah, with the spending limit and the decisions that are theirs. A snagging and quality check on every job, done before the client finds anything. A one-page description of your client journey, and a brochure that shows it. Ordering and supplier chasing moved to Hannah, with your sign-off over a set amount.

Your 90-day plan

Six actions, two per priority. They're timed so we can do the harder ones together. One at a time, in this order, and let each one become routine before you start the next.



Days 1 to 30 (October)

1. Start your weekly cash sheet. From 5 October.

Ten minutes, first thing every Monday: what's coming in over the next eight weeks, job by job, and what's going out (wages, timber and board suppliers, VAT, vans, you). One sheet, same every week. I'll give you the template, so don't build your own.

Cost: nothing. Time: ten minutes a week.

2. Open a VAT account and list your retentions. By 16 October.

Ask your bank for a second business account for VAT and move a sixth of every payment across the same day. Then make a list of every retention you're owed: client, job, amount, due date. Send a polite email on any that are already due. Ring your accountant and tell them the account exists.

Days 31 to 60 (November)

3. Close out your last two finished jobs. By 6 November.

For each one: what you priced it at, what it actually cost (every invoice, every day of labour, split into design, making and fitting), the difference, and one line on why. It's probably the first real profit figure you've had on a single job. Ask your accountant to pull the invoices for you.

4. Set a labour allowance and a design charge. By 27 November.

Use the two closing sheets, plus the kitchen and staircase job, to set an allowance for each stage that reflects what jobs really take, and add a line for design and project management time. I'll give you the templates and we'll check the numbers together on your next quote.

Days 61 to 90 (December)

5. Write what Declan and Hannah can decide. By 11 December.

One page each: what they do, what they decide on their own, the spending limit, and how you'll know it's going well. Hand ordering and supplier chasing to Hannah first. Go through it with each of them in a short, friendly meeting.

6. Put a written programme on every live job. By 18 December.

One sheet per job showing who is on it and when, for the next four weeks, updated every Monday with Declan. A whiteboard is fine to start with, as long as it's kept up to date. This is what lets the team know where they're going next week without ringing you.

What is deliberately not on this list

The five-year plan, the client journey page, the brochure and the contract checklist, because they come in alongside, with support. You've got six actions and a full order book. A person with twelve things on their list does none of them.

Where this goes next

Most audit reports I write end with options, because what's right depends on you, your business and your appetite for change. There's no pressure either way. Here are the three ways forward.

Your options

	Detail
Pathway 1	Construction Success Programme: a 12-month group programme with monthly in-person workshops, 12 workbooks that cover the areas in this report, and a peer-to-peer session after each workshop
Fee	£572 + VAT a month, or £6,177.60 + VAT paid up front (10% off). The £395 + VAT audit fee is credited against it if you join
Pathway 2	One-to-one mentoring: six months working directly with me, at £2,000 + VAT a month, with monthly visits and Zoom catch-ups. Travel and accommodation for visits are charged at cost
Pathway 3	Use this report on your own. The plan stands by itself, and everything in it is something you can start tomorrow. Many owners do exactly this, and some come back later
My view	Pathway 1 fits this report best. Your three priorities line up with the pricing, cashflow and delegation workbooks, and the peer group gives you people running similar businesses to compare numbers with
Next step	Tell me which you would like and I'll send the details. If you'd like to talk it through first, ring me

If you go ahead

- Reply to this report with your choice, or give me a ring if you'd like to talk it through first.
- I'll send the programme details, the dates for your nearest group and a payment link.
- Your first workshop is the next one in your nearest group. People join in any month, and the workbooks are designed to work in any order.
- The pricing, cashflow and delegation workbooks are the first three I'd start with, alongside the actions above.
- Make a start on action 1 now. The weekly cash sheet doesn't need to wait for anything.

The three things I want to see from you

One. Cash you can see. A weekly cash sheet and a separate VAT account. If that's all you do in October, it's a good October.

Two. Numbers, not feel. A closing sheet on two finished jobs and a labour allowance that reflects them. That's where the bigger jobs start.

Three. Say the difficult thing early. Kindly and in private, once a month. It's the habit that lets the rest of the plan hold.

A last word

Sarah, you've built a £1.3 million business from a van and a bench, with beautiful work, loyal people and clients who come back. That's the hard part. What's missing is the bit underneath that lets it run without you, and it's a lot easier to learn than what you've already done.

You said this morning, “I just want to know where I stand.” Now you do. And you can change it. Start with the cash sheet.

Robin

Robin Hayhurst BSc (Hons) MCIOB
Chartered Builder · Construction Industry Mentor
07495 541627 · robin@robinhayhurst.com