

CASE STUDY

CLIENT: Sitting Pretty Rental

A Strategic Consulting Engagement Between www.MarcusWells.info and Sitting Pretty Rental



www.MarcusWells.info

Fractional Business Operations Management &
Consulting



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Sitting Pretty Rental Had Built a Successful Business — But Too Much Still Depended on the Owner

Sitting Pretty Rental is an established Philadelphia-area event rental company serving residential, corporate, school, healthcare, and institutional clients.

What the Company Had Already Built

More than a decade of operating history

Strong customer relationships and established local reputation

Two-truck delivery capacity

Corporate and institutional customers

Partner-based subrental relationships

Approximately \$220,000–\$250,000 in annual revenue

The Real Problem: Owner as Default Decision-Maker

The opportunity was not simply finding more customers. The larger problem was what happened **after the customer placed the order**. Too many operational decisions still flowed through owner India Shaw.

India was regularly involved in: delivery scheduling, route planning, customer calls, employee questions, warehouse issues, setup instructions, driver problems, staffing changes, operational exceptions, vendor coordination, customer complaints, and last-minute troubleshooting.

- ❑ Sitting Pretty had grown beyond the informal operating model that helped build the company. **The next stage required a different question:** How do we move critical operating knowledge out of the owner's head and into systems the company can consistently follow?

Marcus Was Brought In to Help Build the Operating System Behind the Business

Marcus Wells joined Sitting Pretty Rental as a Fractional Operations Manager. The assignment was not to come in with a long report and tell the owner what she already knew was wrong.

The Goal: Identify Where

- Money was leaking
- Staff were unclear
- Processes were inconsistent
- Customers were creating avoidable operational strain
- Technology was falling short
- The owner was becoming the default problem-solver
- Individual employees had too much operational dependency
- Important business knowledge was undocumented

Then Those Problems Needed to Become

Processes

Policies

Checklists

**Defined
Responsibilities**

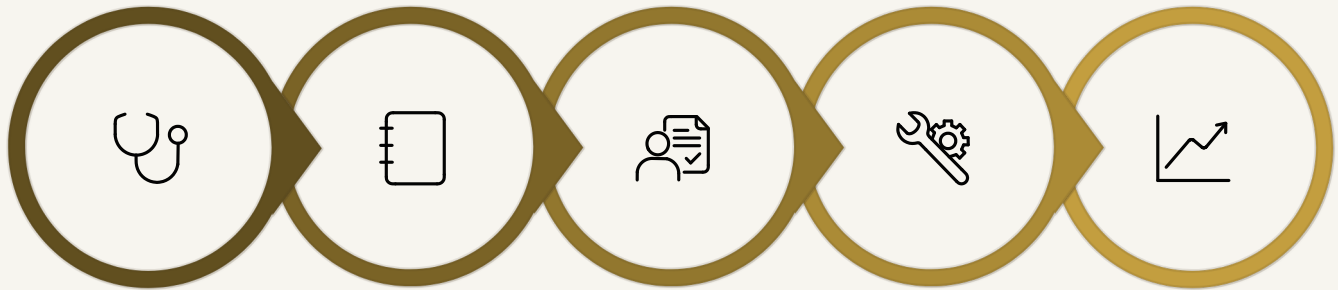
**Technology
Requirements**

**Training
Standards**

Management Systems

- ❏ During the first 30 days alone, the engagement produced **11 operational assets across five categories** and included seven formal working sessions covering operations, logistics, compensation, staffing, policies, technology, and corporate growth.

Marcus's Operating Approach: Diagnose → Document → Delegate → Automate → Measure



Diagnose

Document

Delegate

Automate

Measure

Marcus applied a simple operating principle throughout the engagement: rather than treating each problem as an isolated incident, the work began organizing Sitting Pretty around several connected operating systems.

If the same problem keeps happening, it needs a process.

If the owner has to explain something repeatedly, it needs documentation.

If only one employee knows how something works, it creates business risk.

If a customer request adds labor or complexity, the business needs a policy for it.

If technology is being added, the process should be defined before the software is configured.

Delivery & Dispatch

Before

Delivery operations depended heavily on informal communication. Information could move between word documents, text messages, emails, manual route planning, driver conversations, and owner instructions. Managing multiple trucks created additional coordination problems.

Business Effect

Delivery information is moving from informal communication toward a repeatable process that drivers and management can follow without rebuilding the workflow every day.

Marcus's Contribution: Drivers Daily Log

Marcus developed a web-based **Drivers Daily Log** designed to organize the information drivers need to complete their routes. The system included:

Delivery & Pickup Information

Customer contact details and load notes

Route Sequencing

Google Maps and Garmin routing support with drag-and-drop adjustments

Multi-Truck Logs

Independent logs for multiple trucks operating simultaneously

Additional operating tools: truck inspection requirements, damage documentation, inventory verification, driver responsibilities, customer handoff procedures, and delivery documentation standards.

Pricing Operational Complexity

The Problem

Not every delivery requires the same amount of labor. Sitting Pretty regularly encountered situations involving stairs, elevators, freight elevators, loading docks, long carries, hills, delayed customers, restricted access, premium delivery windows, and after-hours requests. Historically, many of these complications were handled through customer accommodation rather than consistent pricing — meaning operational difficulty could increase while revenue from the order remained the same.

Business Effect

The company now has a clearer distinction between **Standard Service** and **Additional Operational Complexity**. This gives staff a process to follow instead of requiring India to negotiate every exception individually. It also allows additional labor and scheduling difficulty to be priced rather than quietly absorbed.

Marcus's Contribution: Formalized Additional-Charge Policies

**Limited-
Access
Charges**

**Waiting-
Time
Charges**

**Premium
Delivery
Windows**

**Distance-
Based Order
Minimums**

**After-Hours
Service**

**Special
Delivery
Requiremen
ts**

Operational Standards & Quality Control

Before

One of the largest operational risks discovered during the engagement was the amount of knowledge being communicated verbally. Employees were expected to know how inventory should be counted, how trucks should be prepared, how equipment should be handled, how a setup should look, and what should happen before leaving a job — but many of those standards were not documented.

This created inconsistency: customer orders shorted due to inventory miscounts, setup errors requiring correction, missing-item disputes without strong delivery documentation, and employees depending on India to determine whether a job was complete.

Business Effect

Employees no longer have to depend solely on memory or repeated verbal instructions to understand how Sitting Pretty expects the work to be completed. The business is developing its own operating standard.

Marcus's Contribution: Role-Based Documentation System

Field Operations

Setup sequencing, equipment placement, linen standards, final inspection, breakdown procedures

Warehouse

Inventory preparation, cleaning standards, equipment inspection, damage identification, subrental handling

Drivers

Vehicle responsibilities, delivery documentation, truck inspections, customer handoff, route procedures

Supervisors

Setup oversight, staff accountability, quality control, escalation responsibilities, operational reporting

Quality-Control Checkpoints

Documentation alone does not create consistency. The work also needed checkpoints where employees verify that the process was actually completed.

Operating Controls Established

Inventory Counts & Damage Inspections

Equipment Condition & Truck Readiness

Final Setup Inspections

White-Chair Cleanliness & Linen Placement

Equipment Recovery & Customer Handoff

Delivery Documentation

Core Philosophy: Do not depend on someone remembering to check the work. Build the check into the process.

Example: Final Setup Inspection

Before leaving a completed setup, the team verifies: tables, chairs, linens, equipment placement, carts, dollies, straps, tools, supplies, company equipment, and company trash.

Business Effect

Quality becomes less dependent on which employee happens to be working that day.

Real-World Proof: Turning a Major Client Job Into a Better Operating System

MASTERY CHARTER SCHOOLS — PROOF POINT

The Context

Sitting Pretty already had an established relationship with **Mastery Charter Schools before Marcus joined the company**. Marcus did not create the relationship or originate the approximately \$8,000 Mastery order.

The value of the Mastery story is what the event exposed operationally. A large setup involving hundreds of chairs and dozens of tables revealed problems involving crew sizing, cart handling, liftgate safety, equipment requirements, delivery access, setup sequencing, time estimates, and final inspections.

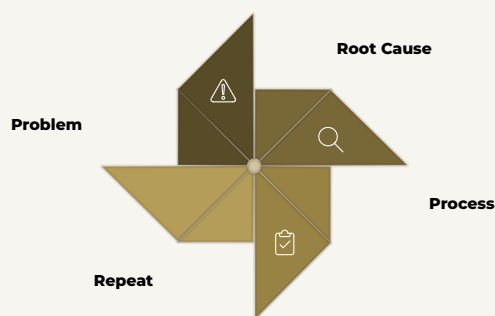
Instead of treating these issues as isolated mistakes, Marcus and India used the experience to identify where stronger operating standards were needed. Those lessons helped shape safety procedures, equipment requirements, setup processes, training content, quality-control procedures, and crew-planning expectations.

What Happened Next

On a later Mastery setup, India reported that the team performed substantially better. The new carts worked. The team was more organized. The setup was completed significantly faster. More of the remaining time was spent on final quality checks rather than recovering from operational problems.

The important result was not the sale. The operational result was this:

A difficult job became organizational knowledge the company could reuse.



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Workforce Structure & Employee Redundancy

Before

Sitting Pretty had significant dependence on a small number of frontline employees. The workforce model included flat weekly compensation regardless of actual hours worked — creating problems during both slow and busy periods. The company also faced key-person risk: if one important driver was unavailable, the owner could be forced back into the truck.

Business Effect

The workforce is being structured around business continuity rather than dependence on one employee.

Marcus's Contribution & The New Direction

Compensation Modeling

Hourly compensation modeling, driver and general staff pay structures

Backup Coverage

On-call staffing and backup-driver planning to eliminate single-driver dependency

Cross-Training

Multiple employees capable of driving; defined job expectations and role responsibilities

Driver Redundancy

Build backup coverage, define responsibilities before employment begins, reduce dependence on individual personalities

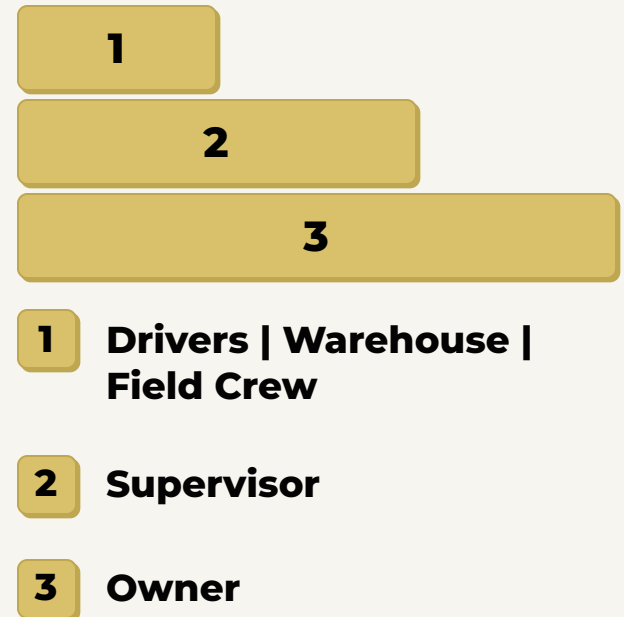
Building a Management Layer

Reducing owner dependence requires more than hiring additional frontline employees. Someone needs to manage the work. Sitting Pretty identified the need for an operational supervisor who could become the owner's eyes and ears inside daily operations.

Supervisor Responsibilities Being Built Into the Role

- Staff coordination and attendance accountability
- Delivery oversight and setup quality
- Warehouse standards and customer escalations
- Employee issues and training
- Camera monitoring and emergency driver coverage
- Operational reporting and escalating true management issues to India

The Management Model



Previously, problems moved directly from frontline employees to India. The new structure creates another level of operational responsibility. Not every driver question, employee disagreement, late delivery concern, warehouse issue, setup decision, or staffing problem should require the owner.

Customer Intake & Live Reception

Operational dependence was not limited to the warehouse and trucks. Incoming customer calls were another major source of owner interruption. Missed calls, slow responses, and customer frustration with AI-based answering created concerns about lost opportunities.

Marcus's Contribution: ReceptionHQ Framework

Marcus reviewed inbound call information and helped Sitting Pretty structure the move to **ReceptionHQ live receptionist services**.

Rather than treating ReceptionHQ as a generic answering service, the goal became building a Sitting Pretty-owned customer intake process.

Inbound call
scripts and
outbound
delivery/pickup
scripts

Approved FAQs
and lead-
capture
requirements

Corporate
inquiry handling
and call
classifications

Escalation rules
and customer-
service
boundaries

The Operating Rule

Information can be handled by the receptionist. Judgment remains with Sitting Pretty management.

Receptionists can answer approved questions and capture information. They should not independently decide special pricing, refunds, discounts, liability questions, inventory exceptions, customer disputes, or non-standard logistics.

Business Effect

The company is building a front-end customer-service system that can capture opportunities without routing every caller directly to the owner.

Technology Implementation With Operational Requirements First

Sitting Pretty elected to move from Point of Rental Essentials to **Point of Rental Elite**. The software change represented a major financial and operational commitment. India had already researched Point of Rental and participated directly in the decision. Marcus's contribution focused on helping the company define what the technology needed to accomplish operationally.

Areas Marcus Helped Address

Multi-Truck Dispatch & Mobile Driver Workflows

Electronic Signatures & Delivery Documentation

Subrental Tracking & Driver Communication

Employee Time Tracking & Storefront Requirements

Website Integration, Tracking Pixels & Customer Intake

Training Requirements & Implementation Planning

The Operating Principle

Software should support a defined process — not become the process.

The objective is for Point of Rental Elite to support Sitting Pretty's operating system rather than forcing staff to create new workarounds.

Marcus participated in vendor discovery, implementation discussions, and training-related planning. Implementation remains underway.

- ❑ Process definition must precede software configuration — not the other way around.

Building a Repeatable Corporate Growth Process

Sitting Pretty already had corporate and institutional customers before Marcus joined the business. The opportunity was not proving that Sitting Pretty could serve corporate accounts — it was building a repeatable process for finding, communicating with, and retaining more of them.

Marcus's Contribution: Corporate Growth Assets

Corporate Partner Program and corporate pitch materials

Capability presentation structure and outreach email templates

Phone outreach language and LinkedIn messaging

Corporate prospect databases and past-client reactivation strategy

Target-industry segmentation and corporate-account follow-up processes

Important Distinction

Marcus did not create Sitting Pretty's existing Mastery Charter relationship. His contribution is building the system that helps Sitting Pretty pursue, organize, and follow up with more opportunities like those existing relationships.

Business Effect

Corporate growth becomes less dependent on remembering who to contact and more dependent on following a defined process.

Find

Communicate

Retain

Key Target Segments

Schools, universities, healthcare organizations, medical facilities, institutional clients, and event-related corporate buyers.

The Larger Change: Marcus Is Helping Build the Business Behind the Documents

The most important improvement is not one checklist, one employee, one software platform, or one customer. It is the shift from **owner-dependent operating knowledge** toward **company-owned operating knowledge**.

Before

- The owner remembers.
- The owner explains.
- The owner answers.
- The owner routes.
- The owner fixes.
- The owner trains.
- The owner checks.
- The owner supervises.

The Direction Now

- The SOP explains.
- The checklist verifies.
- The receptionist captures.
- The supervisor manages.
- The software records.
- The employee executes.
- Management measures.
- The owner leads.

The transition is still underway. Sitting Pretty is not yet completely owner-independent. But the company now has significantly more operating infrastructure than it had when the engagement began.

Tangible Work Produced During the Engagement

Operations

Drivers Daily Log, route workflow, warehouse inventory checklist

Truck inspection checklist, damage inspection log

Order intake procedures, setup inspection procedures

Delivery policies, customer pickup procedures, field operating standards

People

Compensation modeling, pay-scale framework, driver redundancy strategy

Supervisor role structure, staff expectations, training framework

Onboarding structure, role-based manuals

Customer Experience

ReceptionHQ operating framework, inbound call script

Delivery and pickup confirmation scripts, FAQ library

Call escalation system, corporate call handling

Technology

Point of Rental requirements, dispatch workflow planning

Mobile-user requirements, website integration questions

Digital-signature and driver communication requirements

Growth Systems

Corporate Partner Program, corporate sales materials, outreach scripts

Past-client reactivation strategy, corporate prospecting structure

Target-market prioritization

 **Goal across all assets:** Create systems that make the company easier to operate, easier to train, easier to manage, and less dependent on one person's memory.

Why This Matters for Business Value

Sitting Pretty's long-term objective is not simply increasing revenue. The business also wants to become more stable, profitable, manageable, and eventually transferable to another owner. A future buyer does not want to purchase a job that requires India to remain involved indefinitely.

A Stronger Company Has

Written Procedures & Defined Employee Roles

Management Accountability & Repeatable Customer Intake

Documented Pricing Policies & Technology-Supported Workflows

Redundant Staffing & Recorded Customer Relationships

Financial Controls & Measurable Operating Performance

These Systems Can Support

Reduced Owner Dependence

Lower key-person risk

More Consistent Execution

Better employee training

Stronger Management Independence

Greater operational consistency

Cleaner Business Transferability

Exit readiness

The ultimate financial effect must be measured through actual earnings and operating results. But documenting and delegating critical processes can reduce many of the risks a future buyer would otherwise inherit.

Who Marcus Works Best With

Marcus Wells is best positioned to help owners who already have customers, revenue, employees, vendors, and work coming in — but still find themselves saying: "Everything still comes through me."

Common Warning Signs

Constant Owner Questions

Employees constantly asking the owner questions

Knowledge in Heads

Procedures living inside people's heads

Inconsistent Training

Too much dependence on one employee

Inconsistent Answers

Customers receiving different answers

Case-by-Case Pricing

Pricing exceptions handled individually

Owner in Scheduling

Owner involvement in daily scheduling

Repeated Mistakes

Repeated operational mistakes with no process fix

Software Workarounds

Staff work around software instead of through it

No Management Layer

No clear management layer between owner and crew

Growth = More Stress

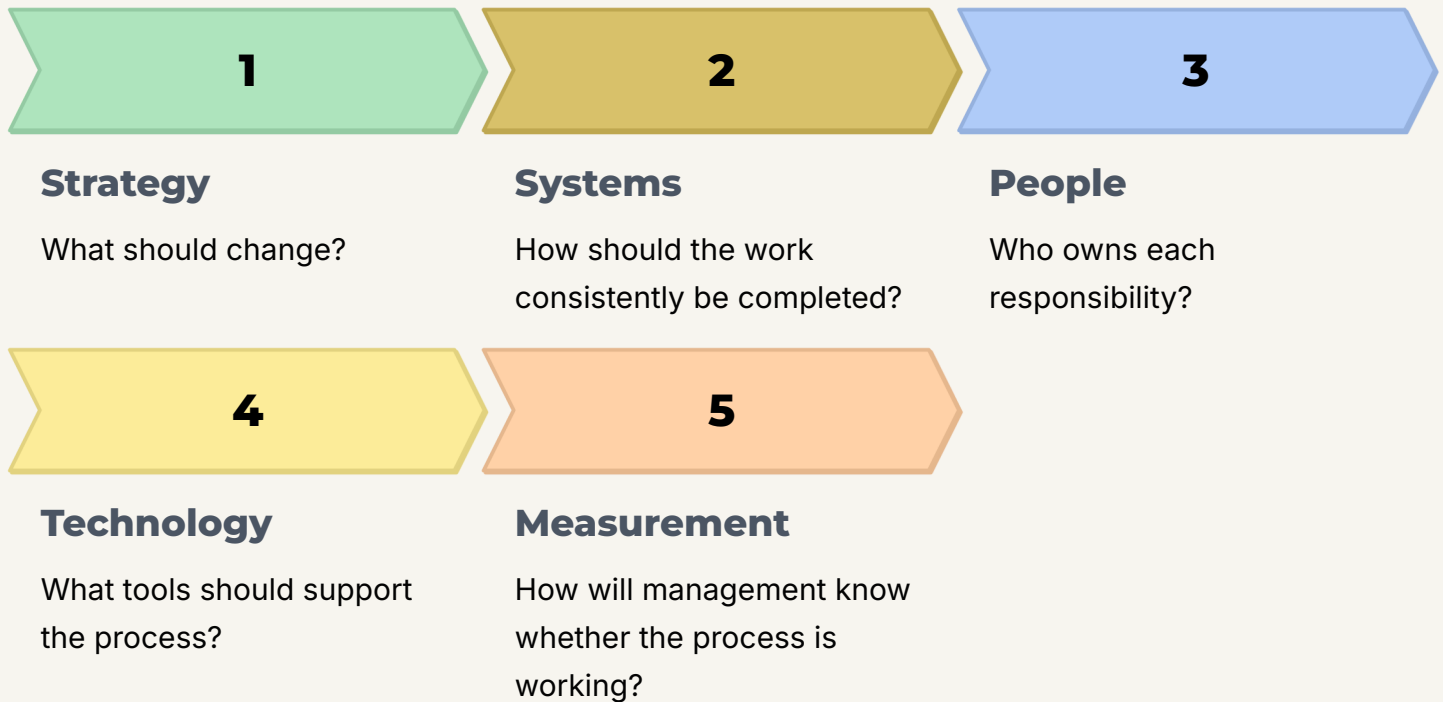
Growth creating more stress instead of better operations

That is where Fractional Operations Management can provide value.

Visit www.MarcusWells.info — Turn Your Owner Dependent Business to a Business Built on Systems.

The Role of a Fractional Operations Manager

Strategy is only useful when someone helps build the operating structure to execute it. Marcus works across five connected areas:



The goal is not to create more paperwork. The goal is to reduce the number of important business decisions that depend entirely on the owner's memory, availability, or personal intervention.

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The Sitting Pretty Result: The Work Is Still Ongoing — But the Operating Model Is Changing

Sitting Pretty Rental entered the engagement as an established company with real customers and clear growth potential. The business did not need someone to pretend that everything was broken. It needed someone who could identify where an established company had outgrown its original operating methods.

Marcus Helped the Company Begin Replacing

Memory → Documentation	Verbal Instruction → Standards	Individual Dependency → Redundancy
Owner Intervention → Management Responsibility	Informal Communication → Operating Processes	Unpriced Complexity → Policies
Disconnected Technology → Defined Requirements		

The work is not finished. That is precisely why the case is meaningful. This is not an overnight turnaround story. It is the story of an established small business beginning the difficult work of becoming a company that can operate beyond its founder.

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Client Testimonial

Working with Marcus over the past 30 days has completely transformed Sitting Pretty Rental. Before his help, we were drowning in manual processes, operating seven days a week, and risking severe driver burnout . In just one month, Marcus delivered 11 operational assets .

He built a web-based daily delivery log that replaced our chaotic Word doc system and helped us restructure to a sustainable 5-day work week .

He also finalized a clear hourly compensation framework for our team and simplified our complex delivery fees into a single \$150 flat surcharge . Finally, he built the complete foundation for our Corporate Partner Program .

Thanks to Marcus, we now have the systems to scale efficiently



India Shaw

Owner, Sitting Pretty Rental

Does Your Business Work — But Still Require You to Make Everything Work?

You may not need another full-time executive. You may need someone who can examine how your business currently operates, identify where the company depends too heavily on you, and help build the systems behind the work.

Marcus Wells — Fractional Operations Manager & Business Consultant

Areas of focus include:



Operational Systems & SOP Development

Building the documented processes your business needs to run consistently without owner intervention.



Workflow Design & Employee Accountability

Defining who owns what, how work gets done, and how management verifies it was completed correctly.



Management Structure & Customer Experience

Creating the management layer between owner and frontline staff, and building consistent customer-facing processes.



Technology Implementation & Process Improvement

Ensuring software supports a defined process — not the other way around.



Owner Independence & Exit Readiness

Building a business that can operate, grow, and eventually transfer without depending on one person's memory.

Ready to Talk?

Build a Business That Knows How to Operate Without Everything Coming Back to You.

Schedule an Operations Strategy Session

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Dependent Business to a Business Built on Systems.**



Marcus Wells

FRACTIONAL BUSINESS OPERATIONS & CONSULTANT

Problem solver. Systems builder. Growth enabler.
Marcus helps small business owners identify and fix the operational gaps that are quietly costing them time, money, and growth.

B.S Technology Management

A.S Business Administration

"If your business is heavily dependent on you to survive, it is eventually going to fail."

If you answered YES to any of the following, let's talk:

- Struggling with consistent marketing?
- Can't find the right people to hire?
- Lead follow-up falling through the cracks?
- Running on scattered systems, or no systems at all?

Credentials & Experience

- 15 Years Small Business Operations & Digital Marketing Experience
- Google AI Professional Certificate
- Google Project Management
- Wharton: AI Applications in Marketing Cert
- Google Cybersecurity Professional Cert
- Six Sigma Green Belt
- Creator of the "Leak Point" System(TM)
- Certified in Cybersecurity (ISC2)



Ready to Fix Your Leaks?

 Schedule your Strategy Session today: www.MarcusWells.info — get your time back!