The Operator's Field Manual

For founders whose business has outgrown how it's run.

Twelve short chapters. No frameworks named after animals. Practical moves you can run this quarter without hiring a layer of management or buying another tool.

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CHAPTER 01

The bottleneck is structural, not personal.

You are not the problem. The routing is.

Most small service firms grow past the point where one person can hold the business in their head. The org chart gets bigger. The way work actually moves does not. So the founder stays the router. Every hard call, every unusual request, every judgment about a client still lands in the same one or two conversations.

That is not a discipline problem. It is a structural one. The business has outgrown the way it is run.

The four tells

- Work stalls when you are unavailable for a day.
- The same three questions come to you every week from different people.
- You cannot tell which client is at risk until someone complains.
- You keep meaning to write things down, and never get to it.

One of these is normal. Three or four together is structural.

CHAPTER 02

Move the decision, not the task.

Delegation fails because founders hand off work without handing off judgment.

The most common delegation mistake is giving someone a task and keeping the decision. They do the work, then wait for you to approve the call. You are still the router. The queue just has a nicer interface.

The move that works: write down the rule you use to make the call, hand the rule to the person doing the work, and let them decide inside that rule. Escalations only come to you when the situation is outside the rule, not every time.

A worked example

Instead of "send me every proposal over $10k for approval," write: "Standard terms, discount up to 10%, payment net 30. Anything outside these three, escalate." Now the account lead runs 80% of proposals without you. You see the 20% that matter.

CHAPTER 03

Handoffs are where the business leaks.

Most operational friction is not inside a role. It is between two roles.

Sales to delivery. Delivery to account management. Account management to renewal. Each handoff is a moment when context, commitments, and quiet expectations can get dropped. In a small firm without a clean handoff, that context lives in one person's head, usually the founder's.

What a clean handoff looks like

- A single artifact that carries the context (kickoff doc, transition note).
- A named owner on both sides of the handoff.
- A short synchronous conversation to confirm the transfer.
- A place the artifact lives so anyone can find it in six months.

Three of the four is enough. Zero of the four is where most firms live.

Cadence beats heroics.

A weekly loop that surfaces problems as patterns costs less than one saved client.

If the only way you find out something is wrong is when a client calls upset, you are running on heroics. Heroics burn your senior people out and let small problems compound into big ones.

The minimum viable cadence

- Weekly, 45 minutes, same day and time.
- A short written status from each account lead: what is on track, what is at risk, what needs a decision.
- A running list of decisions made and open.
- One person runs it. One document holds it.

This is not a status theater meeting. It is the moment the business's actual state becomes visible to the operator running it.

CHAPTER 05

A scorecard your team will actually read.

Five numbers, one page, updated weekly. Not a dashboard.

The scorecard trap is building something so comprehensive that no one opens it. In a small service firm, five numbers are enough:

- Cash on hand (weeks of runway at current burn).
- Booked revenue this month vs. plan.
- Delivery on track / at risk / off track (count of engagements).
- Utilization or capacity (whichever your team argues about).
- One leading indicator you actually trust (pipeline stage 2+, retained accounts, etc.).

Anything else goes on a second page or in a separate report. If a number does not change a decision, it does not belong on the scorecard.

CHAPTER 06

Hiring will not fix the routing.

More hands, same routing, is the fastest way to double the bottleneck.

The instinct when the business is stalling is to hire. Sometimes the answer is a hire. Often the answer is that the work you would give the new person still routes through you, so the new person adds cost without adding throughput.

Before hiring, answer three questions

- What decisions will this person own without asking me?
- What is the artifact or cadence that lets them see what needs deciding?
- If the answers are "none" and "there isn't one," you are hiring an assistant, not an operator.

An assistant is a fine hire. Just do not expect one to change how the business runs.

CHAPTER 07

Tools do not change who decides.

Software records the problem in a nicer format. It does not move the decision.

A CRM does not decide which deals to chase. A PM tool does not decide which project is at risk. An automation platform does not decide what to escalate. All three are useful when the underlying decision rights are clear. All three make things worse when the decision rights are not.

Fix the routing first. Then buy the tool that supports it. Not the other way around.

CHAPTER 08

The client at risk is the one who stopped complaining.

Silence is the signal most firms miss.

Loud clients are annoying, but they tell you what they need. The dangerous client is the one who was engaged, then went quiet. They have already decided; they are just running out the contract or shopping quietly.

The two-question account check

- When was the last substantive conversation (not a status update) with this client's decision-maker?
- If it was over 30 days, who is going to have one this week?

Run this once a month against your top ten accounts. It takes 15 minutes and prevents the surprises that cost you a year of revenue.

CHAPTER 09

The two-week vacation test.

If the business cannot run for two weeks without you, you don't own a business. You own a job.

This test is uncomfortable on purpose. The point is not to actually vanish. The point is to design the business so you could.

What has to be true

- Someone else can price and close a standard engagement.
- Someone else can approve a scope change up to a defined threshold.
- Someone else runs the weekly cadence.
- A client escalation has a named path that isn't you.

Any "no" on this list is a design task, not a personality flaw.

CHAPTER 10

Write down what only you know.

The knowledge in your head is the biggest single point of failure in the business.

You do not have to write everything down. You have to write down the five to ten things that only you know and that the business depends on: how you price edge cases, how you decide when to fire a client, how you handle a specific vendor, what makes a bad-fit prospect.

Two hours a week for a month. Rough notes, not polish. Store them where your team can find them. This is the single highest-leverage documentation you will ever do.

CHAPTER 11

Firing bad-fit clients is an operations move.

The wrong client costs you a good client's attention.

Every hour spent on a client who drains your team is an hour not spent on one who would grow with you. The math is boring and obvious, and most founders still refuse to do it because the wrong client pays on time and the right one is speculative.

A working definition of bad-fit

- Consumes disproportionate senior time relative to revenue.
- Does not act on the recommendations they pay for.
- Treats your team in ways you would not tolerate elsewhere.
- Blocks work you would rather be doing.

One of these is a hard client. Three of these is a decision you have already made and haven't executed.

CHAPTER 12

You do not need a fractional COO.

You need a decision, a rhythm, and someone honest enough to name what's actually broken.

The market has a habit of naming every operator role a fractional something, then charging a retainer for it. The name matters less than the work. What most founder-led service firms actually need is a short, honest engagement that maps where the business breaks, sequences the two or three moves that would matter most, and installs the cadence to run them.

If you get that, the title on the invoice is irrelevant.

If you want a second set of eyes

The Friction Audit is a two-week engagement that produces a Friction Map (where work is stuck), a sequenced list of the two or three changes that would move the most, and a working session with your senior people. No implementation obligation. You leave with a decision.

Start at raywilliams.consulting/friction-audit.