THE OPERATOR'S METHOD · LESSON 1 FIELD WORKSHEET

Pipeline Truth: The Morning Dig
Name _____ Week of _____

1 YOUR TOP FIVE FOR TOMORROW

Build it the day before. Best fits first, then renewal-window or recent-trigger accounts, then everyone else. Keep real names off any shared screen.

#	PROSPECT (FIT)	TRIGGER (VERIFIED FACT)	REASON THEY SHOULD CARE (HYPOTHESIS)	SMALL NEXT STEP (DAY + TIME)
EX	*Commercial trucking co., about 40 drivers*	*Added a second yard; renews in March*	*New location and operations changes may not be reflected in the insurance submission*	*10 minutes Tuesday morning to compare what changed*
1				
2				
3				
4				
5				

2 FIVE-DAY TALLY: THE FOUR COUNTS

Run the Morning Dig first thing each workday: phone before inbox (genuine client emergencies excepted). Tick marks by hand, then total.

COUNT	MON	TUE	WED	THU	FRI	WEEK
Dials						
Meaningful conversations A real exchange with a buyer						
Meetings set Buyer agreed to a date and time						
Meetings held The meeting happened						
Meetings due this week For show rate: held ÷ due						
Qualified opps: added / out Tracked separately						

3 FRIDAY REVIEW (PRODUCER + MANAGER)

1. Where did the funnel slow?

2. What evidence did we review?

3. What one behavior will change?

READ THE NUMBERS AS HYPOTHESES

Few conversations per dial → check list quality, contact accuracy, calling time.
Few meetings per conversation → listen to the reason for calling and the ask.
Few meetings held when due → check buyer agreement, meeting value, confirmation.
One week of small counts is not a verdict.

Inspect one low conversion

Listen to a call or role-play it. Agree on one behavior. Compare results after enough attempts to mean something.

Refill check

Qualified opps out ÷ your conversion rate = conversations needed: ____ ÷ ____% = ____

For Lesson 2: write one opener you used this week, word for word.