

CCD Executive Board Memo

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To: CEO / Board Chair From: Kyle Robins, VP Date: May 12, 2026 Re: 21-year data analysis — findings & 2026 action plan

CCD is on track for \$4.71M in 2026 — its best year ever — with \$4.27M of identified, addressable upside sitting in callable lists, near-miss recoveries, suppressed upsells, and a fixable A/R problem.

Executive Summary

- **\$1.15M in YTD revenue through May 12 — already +19.6%** over the 2022–2025 same-window average. Mean ticket \$5,412 is the highest in company history.
- **\$3.95M of dormant relationships** are sitting in a callable list (497 past customers, 5+ years cold, all have phone/email). A 5% reactivation rate = \$200K in fresh contracts this quarter.
- **\$1.65M of outstanding balance** is on the books, concentrated in **one salesperson (Adam Valendra, 38% bad-debt rate vs. peer median 7%)**. This is an A/R mechanics problem, not a sales problem.
- **~\$600–800K/year of high-margin powdercoat attach revenue** is being left on the table by the four highest-volume reps. Universal under-attach — a process fix, not a hiring fix.

The Big Numbers

KPI	Current	Target / Opportunity	\$ Impact
2026 projected revenue	\$4.71M	\$5.0M+	+\$290K
Dormant high-LTV reactivation pool	497 customers, 0 contacted	5% reactivation	+\$200K
Near-miss reactivation (2023+ failed appts, high-converting cohorts)	154 leads	50% recovery	+\$322K
Outstanding A/R balance (Adam Valendra)	\$246,765	\$0 with comp restructure	+\$246K cash
Powdercoat attach rate (top 4 reps)	5–10%	30% (Marc Benavides benchmark)	+\$600–800K/yr
Facebook inquiry volume (21-yr trend)	232/yr (+1,165%)	Reallocate Clipper Print → Facebook	+88% rev/inq
Repeat customer rate	4.5%	Plan economics to first-job payback	—
Mean ticket (2026 YTD)	\$5,412	+13.5% YoY — hold the line	—

Total Q3-capturable upside: ~\$1.5M+ from items already on this page.

What To Do Monday

1. **Hand Leslie the dormant-customer call list.** 30 calls/day × 5 days. \$3.95M historical revenue is on that sheet. Even a 5% conversion = \$200K.
2. **Sit down with Adam Valendra.** 38% bad-debt rate means his deals are either too aggressive or his collection follow-up is broken. Change his comp to pay-on-collection if he can't fix it.

3. **Mandate inquiry_price_quoted entry at appt-set.** Five filled rows out of 17,000 contracts. This is free pricing intelligence we've never had.
 4. **Hand the 154 near-miss leads back to the reps who ran the original appts.** \$322K of recoverable revenue, already-warm relationships, decision-maker-absent playbook in the portal.
 5. **CRM hygiene: fix "Tom Giannotti / Gianotti" + "Direct Advantage / Advantage" dupes.** 5-minute cleanup, immediate analytics dividend.
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What To Do In Q3

1. **Cut Clipper Print spend 50%, redirect to Facebook + Internet.** Clipper is dying (-50% volume, -57% close rate over 21 years). Facebook is +88% rev/inquiry. Use the Ideal Customer cohort as the lookalike seed.
 2. **Roll out specialty routing:** Waterproof → Kevin Cerulo (\$14K mean ticket on those jobs). Foundation → Robert Clark. Concrete/Stair → Tom Giannotti. Siding → Ferdinando Crudele. Expect 15–20% close-rate lift.
 3. **Implement the "powdercoat-mandatory mention" rule** in every in-home pitch. Even at a 30% attach baseline (Marc's natural rate), this unlocks \$600–800K/yr across Kevin / Robert / James / Jacob.
 4. **Launch Greenwich premium push.** 25,207 homes, 0.18% penetration, \$1.59M median home value. Senior reps only. Pitch deck ready in portal.
 5. **Train every rep on the city-product matrix.** New Haven → lead with Custom Doors (+18.6pp). Cheshire → Foundation. Manchester → BILCO. 21 years of contracts say this works.
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Where The Risks Are

- **A/R concentration:** \$1.65M outstanding total, \$246K (15%) traceable to one rep. If Adam Valendra's pipeline accelerates without a structural fix, bad debt grows linearly with his close volume.
 - **Facebook is volume-up but close-rate-down.** FB closes 17% vs. company-average 33%. The channel is correctly scaling brand reach, but per-lead quality needs better targeting/qualification or the CAC math erodes.
 - **CCD is structurally one-and-done.** Only 4.5% of customers ever repeat in 21 years. **Acquisition has to clear on the first job** — there is no LTV runway to lean on. Marketing math must assume first-contract payback.
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Supporting Docs (all downloadable in the portal)

MASTER_FINDINGS.md (38 findings) · tomorrow_morning_action_plan.md · dormant_high_value_list.csv (497 contacts, \$3.95M) · near_miss_reactivation_list.csv (154 leads, \$322K) · town_pitch_decks.md (Greenwich/Stamford/Bridgeport/New Haven/Hartford) · appt_failure_playbook.md · ideal_customer_persona.md · sales_team_coaching_plans.md (10 reps)

Appendix — Non-Obvious Findings Worth Knowing

- **Small first jobs (<\$1.5K) repeat 4.7x more often than mid-sized.** They are foot-in-the-door customers, not low-margin nuisances. Do not screen them out.
 - **Stale Zillow listings (90–365 days, then pulled) repeat at 2.6% — 10x normal.** A "couldn't sell, will stay and improve" prospect is a high-propensity CCD lead.
 - **Speed of follow-up barely matters.** Same-day callback closes at 33%; 31–90 day lag closes at 37%. CCD is a research purchase, not impulse. Stop optimizing for instant call-back; start optimizing for week-4 nurture touches.
 - **Out-of-state phone area codes spend \$385 more per ticket.** Transplants in Fairfield/Stamford/Westport over-index on premium spend — auto-tag as high-tier leads.
 - **Leslie touched \$6.6M of revenue across 1,385 contracts (20% of company lifetime).** She is a senior asset disguised as office staff. Compensate accordingly.
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Source: 44,282-row lifetime dataset, 21 years, \$32.4M lifetime revenue, 7,827 unique addresses. Analysis complete 2026-05-12.