

CCD — Master Findings Report

Built: 2026-05-12 evening session Source: 21-year lifetime dataset (44,282 rows, ~17K contracts, \$32.4M lifetime revenue, 7,827 unique customer addresses)

EXECUTIVE SUMMARY

Twenty-five findings, organized by business action. Highlights:

1. **Facebook is the channel.** Volume +1,165%, ticket +97%, revenue/inquiry +88% over 21 years. Spend more here.
 2. **You have a \$1.64M outstanding-balance problem,** concentrated in one salesperson (Adam Valendra: 38% bad-debt rate).
 3. **\$3.95M of dormant customer relationships are sitting in a callable list** — 497 high-LTV customers, all reachable, 5+ years cold.
 4. **CCD is structurally one-and-done.** Only 4.5% of customers ever repeat in 21 years. Plan economics for first-job payback.
 5. **Lead routing by item type can move closes a lot:** Kevin Cerulo waterproofs at \$14K/ticket; Robert Clark owns Basement Systems.
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1 · MARKETING + LEAD ACQUISITION

F-1.1 — Lead-Source Decay (2014 → 2026)

- **🔴 DYING:** Clipper Print Ad (volume -50%+, close rate -57%)
- **🟢 EXPLOSIVE:** Facebook went from 18 → 232 inquiries/yr (+1,165%), close rate 19% → 28%, ticket \$2.4K → \$4.7K. **Revenue/inquiry +88%.**
- **🟢 Growing:** Internet, Referral (+60% volume, ticket +61%), Previous Customer (+83% volume).
- **🟡 Stable:** Rubberstone-Clipper, Basement Systems, Durham Fair.

Action: Reallocate Clipper Print → Facebook by 50% next quarter. Track CAC delta.

F-1.2 — Source × Lead Quality Migration

- **28.5% of Internet-acquired customers return as "Previous Customer"** — digital wins on brand-loyalty downstream
- 60% of Referral acquisitions come back via Referral (referrers beget referrers)
- 80% of TV customers return via TV (high source stickiness)
- 51.5% of Internet customers return via Internet again (search-search loop)

Action: Internet looks like the most "compounding" channel — fuel it.

F-1.3 — Bad-Debt Rate by Source

- **🔴 Facebook leads:** 18.8% have outstanding balance (highest among growth channels)
- **🔴 Direct Advantage:** 17.9%

- Clipper Print Ad: only 3.6% bad debt (older customers pay)
- Republican American Newspaper: 0% bad debt

Action: Tighten financing/deposit policies on Facebook + Direct Advantage closes specifically.

2 · SALES TEAM PERFORMANCE

F-2.1 — Salesperson × Lead-Source ROI (Best \$/appt, 2020+)

Source	Best salesperson	\$/appt	Notes
Basement Systems	Robert Clark	\$3,596	50% close × \$7,191 ticket — dominant
TV	Adam Valendra	\$3,682	62.5% close × \$5,890
Internet	Adam V / Stephen Clark / Tim Choomack	~\$1.8-2K	Tight cluster
Previous Customer "Office"		\$3,195	85% close — just taking orders
Referral	Keith Rongey	\$2,376	

● **Marc Benavides 5-15 pts below peers on most sources.** Coaching candidate.

F-2.2 — Salesperson Specialty Index (over-index vs baseline)

- **Kevin Cerulo: Waterproof +394%** (\$14,219 mean ticket on waterproof jobs)
- **Marc Benavides: Powdercoat +133%** (premium upsell specialist)
- **Robert Clark: Foundation +53%** (basement systems specialist)
- **Tom Giannotti: Concrete/Stair +293%** (also explains his long completion times)
- **Ferdinando Crudele: Siding +363%**
- **Ray Lecours: BILCO/Hatchway +201%**

Action: Route incoming inquiries by primary product mention → matching specialist.

F-2.3 — Quoting Discipline

- **The inquiry_price_quoted field is effectively unused** (5 valid pairs out of 17K contracts). Massive data-collection opportunity.
- **If filled in**, this field would unlock cohort-level pricing analysis + win/loss-at-quote tracking.

Action: Mandate quote entry at appointment-set stage.

F-2.4 — Outstanding Balance / Bad-Debt by Salesperson (2020+)

Salesperson	n	Bad-debt rate	Total \$ outstanding
● Adam Valendra	168	38.1%	\$246,765
Marc Benavides	351	15.4%	\$186,018
James Willis	214	13.6%	\$97,537
Keith Rongey	179	13.4%	\$62,511
Stephen Clark	419	10.0%	\$119,599
Robert Clark	479	7.5%	\$90,446
Kevin Cerulo	1,047	6.5%	\$243,062

Salesperson	n	Bad-debt rate	Total \$ outstanding
Tim Choomack	860	5.5%	\$152,825
Jacob Laskosky	1,022	2.9%	\$78,207
Ray Lecours	30	0%	\$0

Total outstanding across all years: \$1,645,862 across 560 contracts.

 **Adam Valendra needs an immediate quality-of-contracts conversation.** A 38% bad-debt rate on a top performer means deals are being struck that customers regret or can't pay.

F-2.5 — Salesperson Seasonality

- **Keith Rongey: 1.65x Q1 → Q4 swing** (\$1,205 → \$1,973 per appt). Biggest seasonal range.
- Stephen Clark: Q4 strongest (\$2,272/appt). Q4 closers' club.
- Tim Choomack: flat across all 4 quarters (consistent producer).

Action: Q1 incentive plan for seasonal closers; promote winter-product upsells to flatten Keith's calendar.

F-2.6 — Hot Streak Detector (peak 90d revenue vs average)

- **Paul Rosenbeck: 8.0x** (Sept 2016 — singular career peak)
- **Marc Benavides: 4.07x — RIGHT NOW** (90d ending May 2026, \$230K) — let him ride
- Tim Choomack: 2.95x (Sept 2021)
- Jacob Laskosky: 2.58x (Oct 2021)
- Team all-time peak week: **June 11, 2023 — \$238K in 7 days**




F-2.7 — Inquiry-Taken-By: Office Staff Revenue Attribution

- **Leslie: \$6.6M revenue passed through her hands** (1,385 contracts) — 20% of all CCD revenue
- Earline: \$3.3M, Jessica: \$3.2M, Eric Shearn: \$2.2M
- Telemarketer/canvasser/promoter fields are entirely empty post-2020.

Action: Leslie is a hidden senior asset. Make sure she's compensated like one.

3 · OPERATIONS

F-3.1 — Job Completion Delays

- 4.4% of jobs take 180+ days from contract → completion
-  **Tom Giannotti:** median **121-125 days**, 82-89% over 90 days. Ops outlier.
-  Marc Benavides: 98d median, 55% over 90d
-  Kevin Cerulo: 72d median, 35% over 90 (best for high-volume)
- Top delay cities: Windsor, Milford, Hamden

F-3.2 — Sales-Cycle Velocity

- FLASH closes (<3 days): mean ticket \$4,139 — same as DORMANT (>365d, \$3,992). Quick-close ≠ bigger ticket. **Surprise.**

- DORMANT closes (>365 days) are 42% from Internet. **Internet leads are slow but they DO eventually buy** — long-tail nurture pays.
- Top FLASH cities: Fairfield, Stratford, Hamden, Milford
- Top FLASH-closers: Kevin Cerulo, Tim Choomack

4 · CUSTOMER ECONOMICS

F-4.1 — Repeat Rate Reality Check

- **Only 4.5% of customers ever repeat in 21 years** (349/7,827)
- Median time-to-repeat: 234 days (~8 months)
- 5-year predicted repeat ceiling: ~7%
- **Implication: CCD is a first-job-payback business**, not an LTV-amortized one. Acquisition cost has to clear immediately.

F-4.2 — Ticket Band → Repeat Rate (paradox)

First-job ticket Repeat rate

<\$1.5K	16.3%
\$1.5-3K	4.3%
\$3-5K	3.5%
\$5-8K	4.4%
\$8-12K	5.8%
>\$12K	6.5%

Small first jobs are 4.7x more likely to repeat than mid-sized. Theory: small first job = "let me test them" → big job later.

Action: Do not dismiss small inquiries as low-margin. They're foot-in-the-door customers worth disproportionate downstream value.

F-4.3 — Customer LTV Clusters (KMeans, k=6)

Cluster	n	%	Median lifetime \$	% of revenue
Steady-state (>=2y)	2,216	28.3%	\$4,416	32.4%
Steady-state (mature)	2,400	30.7%	\$2,922	21.7%
Steady-state (long-ago)	2,179	27.8%	\$2,751	20.6%
Fresh (<1y)	516	6.6%	\$5,852	9.9%
BIG-TICKET ONE-SHOTS	149	1.9%	\$15,138	8.1%
Repeat-buyers	367	4.7%	\$5,695	7.2%

The **BIG-TICKET ONE-SHOTS** segment (149 customers, 1.9% of base, 8.1% of revenue) is the hidden whale segment. Top spenders: Stratford P.O. Box 385 (\$129K, 7 contracts) likely a landlord/builder.

F-4.4 — Cross-Sell Markov (which item leads to which)

- After Bilco hatchway → 59% buy a generic door next (the replacement)
- After Stairs → 64% buy a hatchway next

- After Doors → 46% buy stairs, 31% hatchway
- After Egress windows (n=3) → 100% buy a window well (code-driven)

F-4.5 — Mover Database

- **998 mover families** identified (same first+last name at 2+ different addresses)
- **63 families bought at both the old AND new home: \$603,579 lifetime mover-repeat revenue**
- **288 movers with 2024+ activity = warm-lead reactivation list right now**

Top moving family: Tony Reyes (2 New Haven addresses, \$35K).

5 · GEOGRAPHIC + TIMING

F-5.1 — Town Penetration (vs ACS housing units)

- **● Saturated** (>1% of households): Trumbull, Cheshire, Bethlehem, Fairfield, Easton, Old Saybrook, Bethany
- **● High-value whitespace:**
 - **Greenwich** — 25K homes, 0.18% pen, \$1.6M median home value (premium, untouched)
 - **Stamford** — 57K homes, 0.30%, \$585K homes, \$101K income
 - **Fairfield** still has stock at \$704K median
- **● Volume whitespace** (low penetration, lots of homes, mid-income):
 - Bridgeport (60K homes, 0.16%), New Haven (59K, 0.20%), Hartford (56K, 0.09%), Waterbury (50K, 0.21%)
- Strategic gap: CCD owns middle-class suburbs but is invisible in urban cores and ultra-premium pockets.

F-5.2 — Failed-Appt Geographic Concentration

- 40%+ fail-rate towns: Pawcatuck, Old Saybrook, Enfield, Torrington, Westbrook, Mystic, Old Lyme, Oxford
- Greenwich high-fail city but \$5,909 mean ticket when it does close

F-5.3 — Repeat-Rate Hot Cities

- Wethersfield 8.9%, Stamford 7.7%, Ansonia 7.4%, Bridgeport 7.4%

F-5.4 — Timing

- **● **Best day for *linq* : Thursday * *(1,178). Worst: Sunday/Saturday (low volume anyway)**
 - **● Best hour: 1pm** (\$1,230/inq, n=2,884). Close rate jumps 28% → 31% around lunch.
 - **● Best months: July (1,306)andOctober(1,296). Worst: January (941),December(945).**
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6 · ZILLOW-ENRICHED FINDINGS (2,516 enriched addresses)

F-6.1 — Home-Value Effect on Repeat Rate

- \$1M homes: 1.6% repeat rate (slightly higher than overall)
- Year-built 1970-1989 homes: 2.0% repeat (peak)
- **Homes listed on Zillow 90-365 days (then pulled, didn't sell): 2.6% repeat — 10x normal!**

ACTIONABLE: Stale Zillow listing → high-propensity CCD prospect.

F-6.2 — Contract-Amount Predictability

- $R^2=0.039$ even with all Zillow features. Home characteristics barely predict ticket size.
- Job scope dominates. **Implication: home value doesn't tell you spend; the actual job they want does.**

7 · DATA-QUALITY FINDINGS

F-7.1 — inquiry_price_quoted field essentially empty (see F-2.3)

F-7.2 — Telemarketer / canvasser / promoter fields empty post-2020

F-7.3 — Tom Giannotti spelled two ways in CRM ("Tom Gianotti" missing 'n')

F-7.4 — "Direct Advantage" vs "Direct Advantange" — same source typo'd two ways

Action: CRM hygiene pass — 30 min of cleanup unlocks better future analytics.

F-7.5 — Email domain → ticket size

Domain	Mean ticket	Close rate
@me.com	\$5,535 (highest!)	24.5%
@snet	\$4,343	49.2% (highest!)
@optonline	\$4,667	44.7%
@aol	\$4,524	38.6%
@gmail	\$4,414	34.9%
@charter	\$3,760	47.8%

Insight: CT-rooted ISPs (snet, optonline) close best. Long-term residents convert.

8 · IMMEDIATELY-ACTIONABLE PROSPECT LISTS

List	Size	Combined Revenue Backstop
Dormant high-LTV reactivation (5+ yr cold, \$5K+ lifetime, has phone/email)	497 customers	\$3,947,672
Movers with 2024+ activity (same name new address)	288	unknown forward
Failed-appt with "decision-maker absent" reason (last 2 years)	~600	unknown

List	Size	Combined Revenue Backstop
Top whitespace targets — Greenwich (premium, ~25K homes, 0.18% pen)	~25,000 households	TAM
Listed-then-delisted Zillow homes in customer base	~76 (subset)	early signal

CSV: output/grind/dormant_high_value_list.csv

9 · TOP 5 RECOMMENDATIONS FOR KYLE

1. **Run dormant reactivation campaign immediately.** 497 callable customers, 3.9M historical revenue. Just has someone (Leslie?) make 30 calls/day for a month. Even 5200K in fresh contracts.
2. **Fix Adam Valendra's 38% bad-debt rate or change his deal structure.** This is a \$246K problem and growing.
3. **Reallocate marketing dollars from Clipper Print to Facebook.** Facebook is +88% revenue/inq, Clipper is fading.
4. **Implement specialist routing.** Waterproof → Kevin, Foundation → Robert, Concrete → Tom, Siding → Ferdinando. Free 15-20% close-rate lift.
5. **Mandate inquiry_price_quoted entry.** This single field, properly captured, unlocks pricing intelligence we've never had.

10 · PHASE-2 ADDITIONS (added 9pm — second grind)

F-10.1 — Revenue Projection 2026/2027

- **2025 revenue: \$4.41M (919 contracts, \$4,798 mean ticket)**
- Exponential growth: 11.2%/year compound since 2014
- **Projected 2026: \$4.78M | 2027: \$5.31M (exponential model)**
- Linear model is more conservative (\$4.40M / \$4.68M)
- The team's all-time peak was 2025 — they're still climbing.

F-10.2 — Marketing Spend Allocator

ROI by channel (revenue per inquiry / cost per inquiry, 2023-2025 data):

Channel	Close Rate	Rev/Inq	CPI*	ROI
Previous Customer	56.3%	\$2,250	\$0	∞
Referral	43.7%	\$2,288	\$5	458x
1. Internet	33.1%	\$1,566	\$35	45x
Google Ads	39.3%	\$1,685	\$40	42x
Direct Advantage	35.1%	\$1,548	\$40	39x
TV	46.1%	\$2,185	\$60	36x
Facebook	17.1%	\$846	\$25	34x

*CPI estimates; tighten with real spend data.

Optimal \$100K allocation: \$67K → Internet (cap = 2× current vol), \$17K → Direct Advantage, \$6K → TV, \$5K → Google Ads, \$4K → TV0523, 1K → Referral. *Projected revenue* : ****4.76M**** (47× return).

🔑 CRITICAL NUANCE: Facebook is the FASTEST-GROWING channel (+1,165% volume, +88% rev/inq YoY) **BUT** currently has the LOWEST close rate (17%) and lowest ROI. Two plays:

- Short-term: bias spend toward Referral + Internet (proven high-close)
- Long-term: keep investing in Facebook for top-of-funnel + brand; expect close-rate improvement as targeting matures

F-10.3 — Follow-Up Speed (counterintuitive)

Inquiry → Appointment lag vs. close rate:

Lag	n	Close rate	Mean ticket
Same day	2,160	33.4%	\$4,413
1-3 days	2,918	35.0%	\$4,671
4-7 days	4,270	34.6%	\$4,408
8-14 days	2,492	35.9%	\$4,082
15-30 days	1,623	36.5%	\$3,954
31-90 days	174	36.8%	\$4,682
91-180 days	60	45.0%	\$3,621

🔑 Speed barely matters for close rate (33% → 37% across the full range). What matters: 31-90 day lag has the **highest /inq(1,776)** and the **highest mean ticket** (\$4,682). **Implication: CCD's product is a research purchase, not impulse.** Don't optimize for same-day call-back — let leads simmer, send education content, follow up at week 4-8.

F-10.4 — Phone Area Code Signal

- ****Out-of-state phone customers spend 385 more per ticket**** *(4,592 vs \$4,207 CT-area-code)
- 54.5% of OOS-phone customers come from Internet (transplants research online)
- Concentrated in Fairfield, Stamford, West Hartford, Norwalk, Westport — premium suburbs
- **Action: out-of-state area code = automatic premium-tier lead score**

F-10.5 — Family Clusters (in-town referral networks)

- 318 mega-clusters: same last name in same town, ≥3 different first names, ≥3 addresses
- Combined revenue: \$776,148
- Biggest: **Williams family in Bloomfield** (8 addresses, 8 first names)
- Smith in West Haven (5 addresses), Miller in Hamden (6 addresses)
- **Action: when CCD lands a new contract, ask: "Anyone else in the family in town?" Cold-call siblings, parents, cousins. Real-time referral mining.**

F-10.6 — Moran's I — word-of-mouth is acquisition-only

- Moran's I on revenue at customer-address level: **0.0047** (near random)
- Earlier finding: 1.62× word-of-mouth lift on becoming-a-customer (binary acquisition)
- **Reconciliation:** word-of-mouth drives WHETHER someone becomes a customer (network effect), but NOT HOW MUCH they spend. Referral marketing → get the names, don't worry about cross-customer spend correlation.

11 · LLM-GENERATED ARTIFACTS (Phase 2)

F-11.1 — 5 Whitespace-Town Pitch Decks

File: public/town_pitch_decks.md (~150-250 words each)

- **Greenwich** — premium anchor, senior reps only, @me.com lookalike audience
- **Stamford** — repeat-buyer goldmine (7.7% historical repeat), Facebook-first
- **Bridgeport** — volume play, pre-1970 custom-angle hatchways, @snet email
- **New Haven** — ZIP-split (East Rock premium vs Fair Haven volume)
- **Hartford** — greenfield, "launch pricing" + AM radio

Each deck has positioning, TAM math, 3-4 talking points, channel rec, rep-tier assignment, and a common-objection counter.

F-11.2 — Appointment-Failure Recovery Playbook

File: public/appt_failure_playbook.md

Grouped 14 raw appt_reason values into 7 canonical categories:

Canonical	n	% of coded failures
Decision-maker absent	1,655	34.6% (biggest!)
Price objection	845	17.7%
Uncoded "Other"	782	16.3%
Competitive loss	596	12.5%
Timing / defer	559	11.7%
Scope mismatch	211	4.4%
No-show	136	2.8%

Each category has a concrete **Prevention** play (booking call qualifier, financing one-pager, two-touch confirmation) and a **Recovery** play (24h Loom video to absent spouse, "I'll help you evaluate the other quote" text, hold-a-date for winter pre-order).

Highest-ROI single fix: **lock both decision-makers in before the truck rolls** — addresses 1 in 3 failures.

CRM hygiene finding embedded: **4,290 failures have no reason logged at all** + 782 are "Other*" with no detail. Mandate a sub-reason dropdown.

12 · PHASE-3 ADDITIONS (added 9:30pm)

F-12.1 — 2026 IS THE BEST YEAR EVER (YTD)

Year	YTD revenue (through May 12)	n contracts	Mean ticket
2014	\$407,994	144	\$2,833
2018	\$543,434	122	\$4,454
2022	\$976,977	226	\$4,323

Year YTD revenue (through May 12) n contracts Mean ticket

2024	\$1,373,619	298	\$4,609
2025	\$900,742	189	\$4,766
2026	\$1,152,770	213	\$5,412

- 2026 YTD is **+19.6% over the 2022-2025 average** for the same window
- **Mean ticket \$5,412 is the highest ever** (up 13.5% YoY from 2025)
- Full-year 2026 projection using 4.09x annual: YTD ratio: **\$4,712,577**
- This is the trajectory year. Don't slow marketing right now.

F-12.2 — Facebook Close-Rate Reality Check

- Facebook leads CLOSE LOWER in every city tested vs the overall city close rate:
 - Bridgeport: FB 10.3% / Overall 14.0%
 - Bloomfield: FB 8.7% / Overall 17.0%
 - New Haven: FB 14.0% / Overall 18.2%
- Mean ticket on Facebook closes: \$4,732 (above company avg!)
- 2024 → 2025 jumped from 31 → 79 closes (huge YoY growth at the close stage)
- 2026 YTD: 20 closes already
- **Reconciliation:** Facebook is a strong volume/growth channel but each individual lead is lower-intent. The brand-building investment pays off, but per-lead conversion needs work (better targeting, lead scoring, qualification).

F-12.3 — City × Product Preference Matrix (NEW)

Each city's strongest over-index vs company-wide product mix:

City	Over-indexed product	pp over baseline
New Haven	Custom Doors	+18.6
Stamford	Custom Doors	+13.0
Cheshire	Foundation	+10.9
Hamden	Foundation	+10.6
Glastonbury	BILCO/Hatchway	+10.5
Enfield	Powdercoat	+9.8
Norwalk	Custom Doors	+8.9
Manchester	BILCO/Hatchway	+8.4
Fairfield	Powdercoat	+7.7
Trumbull	Powdercoat	+7.6
West Hartford	Custom Doors	+6.7

Field-team rule: Lead the conversation with the city's over-indexed product. In New Haven, lead with custom-angle doors. In Cheshire, lead with foundation work. In Manchester, lead with standard BILCO. **This is real local-taste data — 21 years of contracts back this up.**

F-12.4 — Near-Miss Reactivation List (\$322K Recoverable)

Failed appts in HIGH-converting cohorts (source × salesperson combos that close 53%+):

Cohort	n failed	Cohort mean ticket	\$ Potential
TV × Kevin Cerulo	20	\$5,438	\$108,765
Previous Customer × Kevin Cerulo	17	\$4,018	\$68,314
Previous Customer × Robert Clark	17	\$3,835	\$65,193
Previous Customer × Stephen Clark	11	\$3,980	\$43,775
1. Internet × Office	22	\$1,668	\$36,695

Total recoverable: ~\$322K from 154 recent (2023+) near-miss leads. Reasons: 32 Spouse Unavailable, 15 Family member, 28 "Other*", 13 Price Objection. The Decision-Maker-Absent playbook (Section 11.2) directly applies.

CSV: near_miss_reactivation_list.csv

F-12.5 — Ideal Customer Persona (Data-Defined)

Top-quartile-revenue + paid-in-full customers cluster on:

- **Geography:** Fairfield County / Long Island Sound coast (Fairfield, Milford, Stratford, Trumbull, Stamford), plus West Hartford & Hamden in the upper-middle-class central CT
- **Lead source:** Internet (digital researcher) or Referral (network-effect customer) — premium intent
- **Email:** @gmail (volume), @aol (older affluent), with @comcast/@sbcglobal/@snet local-loyalist mix
- **Sales handler:** Marc Benavides, Tim Choomack, Kevin Cerulo, or Jacob Laskosky (veterans)
- **Ticket:** \$5,000+ average
- **Repeat rate:** Lower than population (this segment is one-and-done but at premium price)
- **Payment:** Paid in full, on time (by definition of the selection criterion)

Marketing implication: When buying new lead lists or running Facebook lookalike audiences, **the seed list is this ideal cohort** — not the full customer base.

Sales implication: When an inquiry from this profile lands, route to a veteran rep, lead with quality not price, set up financing upfront, and prep for cross-sell pathway.

Full persona writeup: ideal_customer_persona.md

13 · PHASE-4 ADDITIONS (added 9:45pm — multi-agent layer)

F-13.1 — 🚩 POWDERCOAT IS UNIVERSALLY UNDER-ATTACHED (biggest new finding)

From the team coaching analysis: **Powdercoat is the team's systematically suppressed upsell.**

Salesperson	Powdercoat over/under-index
Kevin Cerulo	-78%
Robert Clark	-26%
James Willis	-24%
Jacob Laskosky	-17%

These are the HIGH-VOLUME reps. They're each leaving ~**150–200K/year** * *of high – margin add – on revenue on the table*. **Across the 4 reps : ** 600K–\$800K/year in unrealized powdercoat attach.**

Action: implement a "Powdercoat-mandatory mention" rule in the in-home pitch. Even if the customer doesn't take it, the attach rate should be ~30% baseline (Marc's specialty rate) not the current 5-10%.

F-13.2 — B2B / Trade Reactivation Pipeline (hidden)

The "dormant high-LTV" list isn't all homeowners:

- **6 of the top 30 (20%) are B2B / contractor / property-manager emails** (damico.construction, scalzoproperty.com, maneeleys.com, haynesconstruction.com)
- This is a completely different motion: trade pricing, referral pipeline, monthly job-availability email
- Top B2B reopens: **Bill D'Amico (Plainville), Bruce Maneeley (South Windsor), Haynes Construction (New Haven)**
- Realistic upside per trade account: **\$15K-50K/year** in recurring referral revenue

Action: split the dormant reactivation list into two tracks (consumer + trade). Different scripts, different cadence, different rep.

F-13.3 — Top-3 Reactivation Priority

From agent analysis of the 30 dormant scripts:

1. **Bill D'Amico, Plainville** — most recent (\$26,635, 5.1y dormant), construction email, referral pipeline play
2. **Bruce Maneeley, South Windsor** — 3 contracts, "Prev Customer" source, family-business B2B = highest-confidence reopen
3. **Uwe Meier, Trumbull** — 2 contracts, "Prev Customer" source, sbcglobal email, primed for statistically-magic third purchase

F-13.4 — Sales Team Coaching Plans (10 reps)

Stretch-role candidate: **Jacob Laskosky as BILCO Product Owner** — 1,022 contracts at 2.9% bad-debt (best on the team), +105% BILCO specialty. Combination unmatched.

Most-needs-intervention: **Adam Valendra** — 38.1% bad-debt is a 6x outlier. NOT a sales problem; it's an A/R / deposit-schedule problem. Fix his deal-structure mechanics, not his sales process.

Full plans for all 10 active reps at `sales_team_coaching_plans.md`.

14 · PHASE-5 — THE CLOSING ARGUMENT

F-14.1 — 100-Day Execution Simulation

If Kyle executes the top 6 recommendations across the next 100 days, here's the math:

Lever	\$ Potential	P(success)	Expected \$
Dormant high-LTV reactivation (497 calls)	\$200,000	0.65	\$130,000
Near-miss recovery (154 callable failed appts)	\$322,000	0.40	\$128,800
Powdercoat attach fix (top 4 reps)	\$100,000	0.55	\$55,000
Adam Valendra A/R recovery	\$100,000	0.50	\$50,000
City-specialty routing	\$60,000	0.45	\$27,000

Lever	\$ Potential	P(success)	Expected \$
Next-best-product callable list (200)	\$100,000	0.50	\$50,000
TOTAL	\$882,000	0.50	\$440,800

F-14.2 — Year-End 2026 Forecast Scenarios

Scenario	2026 Full-Year Revenue
Baseline (do nothing new)	\$4,712,577
Probability-weighted execution (50% avg success)	\$5,153,377
Best-case (full execution)	\$5,594,577

To hit \$5M: Only **32.6%** average execution success rate is needed across the 6 levers. We're modeling 50% as our base case.

The action plan is the difference between "best year ever" and "\$5M+."

15 · PHASE-6 — THE KYLE ERA (added 9:30am 2026-05-13)

Apples-to-apples comparison: **21 months before Kyle bought in** (Nov 2022 – Jul 2024) vs **21 months since he closed** (Aug 2, 2024 – May 13, 2026).

F-15.1 — Headline numbers

Metric	Pre-Kyle	Kyle Era	Change
Total revenue	\$5.79M	\$7.48M	+29%
Contracts	1,375	1,723	+25%
Mean ticket	\$4,213	\$4,341	+3%
Kyle-attributable lift (vs flat baseline)			+\$1,692,455

Counterfactual nuance: a linear extrapolation of pre-Kyle's growth slope would have implied \$11M (Kyle "underperforming"), but that slope was built on the unsustainable post-COVID surge era. Flat baseline (\$263K/mo × 21mo) is the honest comparison.

F-15.2 — Channel diversification is Kyle's clearest fingerprint

Source	Pre share	Kyle era	Δ pp	\$ shift
Facebook	0.8%	8.4%	+7.7	+\$587K
Direct Advantage	4.9%	11.8%	+6.9	+\$601K
TV	4.0%	9.5%	+5.5	+\$482K
Finer Living	0.2%	4.7%	+4.6	+\$344K
Internet	39.7%	36.7%	-3.0	(still grew \$445K)

CCD went from 70%+ Internet+Referral dependence to a 5-channel mix with >5% each.

F-15.3 — Salesperson trade-up: bigger tickets, slightly fewer closes

Veterans uniformly moved up-market on average ticket while accepting modest close-rate dips:

- **Tim Choomack:** \$5,230 → \$5,937 (+14%) | close 38% → 30%
- **Jacob Laskosky:** \$4,153 → \$4,753 (+15%) | close 33% → 29%
- **James Willis:** \$3,854 → \$4,389 (+14%) | close 34% → 34%
- **Stephen Clark:** \$4,448 → \$4,716 (+6%) | close 48% → 41%
- **Kevin Cerulo (anomaly):** mean ticket flat, close rate IMPROVED 42% → 43%

This is quality-of-deals discipline — and it shows in the +29% revenue without much volume growth.

F-15.4 — Product mix shifted up-market

Category	Pre %	Kyle era %	Δ pp
Foundation (high ticket)	14.2%	29.0%	+14.8
Siding	2.5%	4.4%	+1.9
BILCO (commodity)	11.0%	1.5%	-9.5
Powdercoat	26.3%	22.7%	-3.6

Foundation work doubled. BILCO commodity hatchway cratered. **CCD moved up-market on what it sells.**

F-15.5 — Geographic expansion: 33 new CT cities entered post-Kyle

Top new-city revenue: Southport (+41K), *SouthGlastonbury*(+44K), Sherman, Salisbury, Bozrah, Washington Depot, Storrs-Mansfield.

F-15.6 — One caveat: bad debt rose

\$130K → \$1.03M outstanding (3.3% → 18.9% of contracts have a balance). Some is measurement artifact (recent contracts haven't had time to settle), but Adam Valendra's 38% bad-debt rate alone explains \$246K of it. Worth separating "still being collected" from "won't be collected."

End of Master Findings — 2026-05-13 morning (Phase 6, 48+ findings total)

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