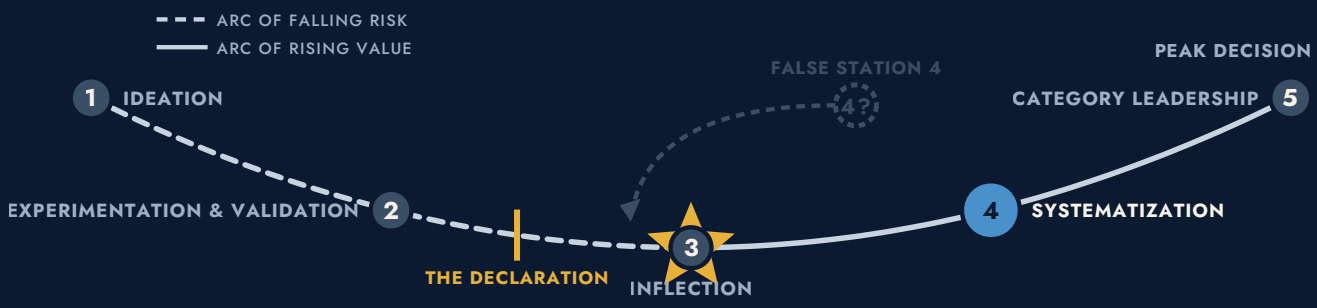
THE PENDULUM SERIES

STATION 4

SYSTEMATIZATION

WORKBOOK

Make the promise run without you, then prove it.



> The architecture phase. The founder still keeps the promise personally.

Business or unit

Prepared by | **Started** | **Reviewed with**

Build it yourself from the books. Go faster with The Pendulum System: a 30-minute call, a mastermind group of business leaders at your Station, or a retreat or other event. thependulumsystem.com
Printable forms: pendulumseries.com/resources

STATION 4 · SYSTEMATIZATION · BEGIN HERE

Where this workbook starts

This workbook is for the owner whose business is at this Station now. It turns the Station's work into decisions, evidence and a plan, and ends at the gate.

THIS STATION

The architecture phase. The founder still keeps the promise personally.

WHERE YOU ARE

The UBP is supported and the commitment has been made real. Marketing, selling or delivery still depends too much on decisions and know-how held by the leaders.

WHAT GRADUATING GIVES YOU

A capability that keeps the promise, belongs to the business rather than to you, and keeps improving. Your time back follows from it.

WHAT PASSING THIS GATE COSTS YOU

The adrenaline, and the daily proof that you are essential.

HOW TO WORK IT

1. Read the worked example before each Work Now page: an owner's answers, taken from the books.
2. Fill the page after it for your own business. Mark every answer O, E, A or U.
3. Review the gate line by line. The first line you cannot mark Established is where the work is.
4. Put the quarter on one page, then bring the gate review and the plan to your next review, or to a call.

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How this workbook works

You do not graduate by completing the form. You graduate when the business condition is established and the evidence supports it.

A review date keeps the work moving; it is not a graduation deadline. Start with the earliest requirement your evidence does not yet support.

THE FOUR MARKS

Give every answer one mark, so you can see what you know and what you are hoping.

O Observed. It happened, and you can point to the record: the invoice, the call log, the buyer's words.

E Estimated. A number worked out from records. Say how.

A Assumed. What you believe and have not tested. An assumption is a test to run, not a fact to plan on.

U Unknown. What you need to find out. Name who will find it and by when.

WHAT IS IN THIS WORKBOOK

PART	WHAT IT COVERS	PAGE
Begin here	What this Station asks, and how to work it	2
Are you here?	The business is built around one promise, but marketing, selling, or delivering it still needs you in every important decision.	4
Worked examples	One before each Work Now page: an owner's answers, taken from the books	6
The Work Now 1	Set standards, build capability, assign owners and decision authority, and use feedback to improve.	7
The Work Now 2	Turn recurring leader intervention into dependable organizational capability.	9
The Work Now 3	Rehearse the 14-Day Test with a three-day absence, then a five-day one, and build a rule for whatever broke.	11
The gate review	Station 4 graduates when named people, working from systems, market, sell and deliver the UBP at the promised standard without your routine rescue.	14
Also here	Before you hire for Station 4	12
Also here	The Framework Friction Score	5
Also here	What the evidence looks like	13
Also here	The one-page plan	15
Also here	Graduation sign-off	16
Also here	An AI interview (optional)	17
Also here	What a good interview sounds like	18
Also here	Before your call	19

THE FIELD MANUAL FORMS THESE PAGES BUILD ON

- Appendix I, Worksheet 4: UBP Capability and Improvement
- Appendix I: Build Capability Around the Promise; Before the Hiring Plan
- Chapter 3: Weekly 3A Worksheet
- Appendix E: The Team Intelligence Tool

Where a quoted line names a chapter or appendix, it means The Pendulum Field Manual.

Are you at Station 4?

WHERE YOU ARE

The UBP is supported and the commitment has been made real. Marketing, selling or delivery still depends too much on decisions and know-how held by the leaders.

YOU ARE HERE IF

The business is built around one promise, but marketing, selling, or delivering it still needs you in every important decision.

Check each sign you recognize, then write the evidence below.

- ☐ Team can't do it as well as I can
- ☐ Successful, but it still runs on me
- ☐ The promise is kept reliably, but named people, working from systems, cannot yet market, sell and deliver it at the promised standard without your routine rescue; the business cannot pass the 14-Day Test, or the Full-Cycle Test where its work turns on a longer cycle.

The False Station 4 Check. Run this check when an established business has people and systems but still lacks a clear competitive direction, or when adding more process fails to resolve the strain. Use the False Station 4 Workbook.

RECORD THE WORKING DIAGNOSIS

Business or offer being examined

MARK

Current Station and the evidence supporting it

MARK

Graduation condition still unfinished

MARK

Evidence or capability to establish next

MARK

Action owner and review date

MARK

"I don't know." Missing evidence is an action to take, not a verdict about your ability. Your Station is not a grade. It names the work to do next.

The Framework Friction Score

Once a quarter, and whenever the same mismatch keeps coming back in the weekly check, score how badly the business's 3A is mismatched with its Station, and so how urgently to act. Score against the Station you are in, not the one you would like to be in.

Start with your calendar, which has already recorded your Altitude: tag each meeting of the last two weeks as Street Level, Hilltop or Mountain Peak, by how far ahead it looked.

Dimension	What Station 4 asks	What you and the team actually do	Match?	Severity	Frequency	S × F
Altitude: what the calendar shows	Hilltop: the next year or two of capability		☐			
Aptitude: who creates the value	Named owners deciding inside their areas; rescue is rare		☐			
Attitude: how money and standards are treated	Strategic Investment maturing into Ownership Culture: spending ahead of demand where the team can absorb it		☐			
					Total	

For each dimension that does not match, score its Severity from 1 to 5 and its Frequency from 1 to 5, and multiply them. Add the results. A dimension that matches scores zero, and the most the business can score is 75. The form does not add up for you. Multiply and total by hand, so you see where the number comes from.

SEVERITY

- 1: it costs time or patience, and nothing else. No work redone, no date moved.
- 2: work inside the business is redone or delayed, but no customer, partner or employee has been let down.
- 3: someone has been let down: a promise to a customer, partner or employee missed, or a person lost over it.
- 4: the damage shows in the numbers or the plan: a customer or contract lost, a quarter's goal missed, or a gate condition that has not moved in a quarter.
- 5: the evidence shows a threat, within months, to the business's cash, its largest customer or its license to operate, and this mismatch is the cause.

FREQUENCY

How often it bit in the same quarter. A bite is an occasion you can name: a decision that waited, a job that went back, a rescue. 1: once or twice in the quarter. 2: about monthly. 3: about weekly. 4: several times a week. 5: every working day.

THE TOTAL SETS THE PRIORITY

0–5	Normal: check quarterly
6–15	Significant: act within a month
16–30	High: act within a week
31–50	Critical: act now
51–75	Severe: act now, and check for an emergency

One rule overrides the bands: a Severity of 5 on any dimension is an emergency, however rarely it bites. Score the damage that has happened and the threat the evidence shows, not the one you fear, and write the evidence beside each number.

The evidence behind each score

A high score points at structure, and the answer is a change in structure: start with the highest-scoring dimension. The Field Manual's Correct the mismatch, in Chapter 3, says what to change for each dimension.

The Work Now 1: how it looked

WORKED EXAMPLE

How the page looked in Steve's story, taken from the books. Read it, then fill the next page for your own business.

UBP promise and customer result this capability must support:

> *Steve's six-technician HVAC business had committed to same-day emergency repair.*

Work: marketing, selling, delivery or the connection between them:

> *The one that could break the promise was the schedule: whether a call could still be fixed today, and which van should take it.*

Current dependency or recurring problem; evidence:

> *Steve had been making that call by phone all day, and many of the questions his team brought him, about sixty a day, were some version of it.*

Accountable owner and standard for a good result:

> *Donna already owned the schedule. Now she owned the decisions inside it, with the authority to pay a technician overtime to keep a same-day promise, up to a limit they agreed.*
>
> *He never gave a time he could not keep, and he called the homeowner himself the moment one slipped. Donna wrote it all down, from a week at his elbow.*

Capability, training, decision authority and escalation needed:

> *What was missing was a rule for who took them, so Miguel took the hard cases, under clear priority and escalation rules.*

Feedback source, improvement action and review date:

> *Then Steve stayed off the schedule for fourteen days, and Donna logged every question she would once have brought him. Most were about old systems the vans were not stocked for.*

Evidence of improvement and the leadership capacity released:

> *On the second run, the schedule held without him.*
>
> *Piece by piece, his team's questions fell from sixty a day to about fifteen.*

1 The Work Now

THE WORK NOW 1

Set standards, build capability, assign owners and decision authority, and use feedback to improve.

Systematization: improve the organizational ability to fulfill the promise. Use one page per capability.

UBP promise and customer result this capability must support:

MARK

Work: marketing, selling, delivery or the connection between them:

MARK

Current dependency or recurring problem; evidence:

MARK

Accountable owner and standard for a good result:

MARK

Capability, training, decision authority and escalation needed:

MARK

Feedback source, improvement action and review date:

MARK

Evidence of improvement and the leadership capacity released:

MARK

The Work Now 2: how it looked

WORKED EXAMPLE

How the page looked in Steve's story, taken from the books. Read it, then fill the next page for your own business.

Your 7.8: the measure that stays average where you are not, and why

> *He realized the new guys didn't know what "clean up" meant because the checklist had never spelled it out. He rewrote the "Certainty Checklist" to require a photo of the clean workspace.*
>
> *Growth had outrun the training. The team was now below the 95% same-day standard Steve had priced and committed to.*

Sales transfer, last ten deals, two sellers, two crews: buyer knew why; no new promise or rescue discount; price held; no delivery rescue; buyer repeated the reason; a second seller and crew did too. Raise marketing spend only when all six hold:

> *Steve never spoke to that customer. Nobody improvised a new promise or borrowed his credibility to rescue the sale. Nobody discounted to compensate for not being him.*
>
> *One sale that goes right is a good sign and not yet a graduation. Steve's had gone right before, when he happened to be unavailable and someone got lucky.*

The decision	Times	What was missing: rule, information, skill or authority	Owner from now	A true exception?
Whether a call can still be fixed today, and which van should take it	*About sixty questions a day were some version of it*	*Information and authority: "Donna's week at his elbow moved the standard and the information. Her overtime limit moved the authority."*	*Donna*	*No: routine*
Calls on old systems the vans were not stocked for	*Most of the questions Donna logged in the fourteen days*	*A rule for who took them*	*Miguel (the hard cases)*	*—*
Quotes	*—*	*Authority: the scope and price limits inside which Felix decided alone*	*Felix*	*Only what falls outside the agreed limits is escalated*
A customer's gate code (Miguel's call on Steve's anniversary)	*Once, at dinner on his 15th wedding anniversary*	*Information: Steve looked it up in his notes app*	*—*	*No: "It wasn't an emergency."*

2 The Work Now

THE WORK NOW 2

Turn recurring leader intervention into dependable organizational capability.

When a decision returned to Steve, they asked what was missing: a rule, information, skill or authority.

Sarah Patel's associates followed every documented protocol, and their crowns were flawless. Their patient satisfaction scores sat at 7.8 out of 10, quarter after quarter, while hers held at 9.6. More documentation, oversight and checklists did not move the number. Training the performance, not just the procedure, did.

Most businesses have that number somewhere: the measure that stays stubbornly average wherever you personally are not.

Decisions that came back to you this week

The decision	Times	What was missing: rule, information, skill or authority	Owner from now	A true exception?
				☐
				☐
				☐
				☐
				☐
				☐
				☐
				☐

Your 7.8: the measure that stays average where you are not, and why

MARK

Sales transfer, last ten deals, two sellers, two crews: buyer knew why; no new promise or rescue discount; price held; no delivery rescue; buyer repeated the reason; a second seller and crew did too. Raise marketing spend only when all six hold:

MARK

The Work Now 3: how it looked

WORKED EXAMPLE

How the page looked in Steve's story, taken from the books. Read it, then fill the next page for your own business.

The measures that must hold: service, revenue and the quality measure, with today's level

> *Your quality measure holds. For Steve, that was a 4.8-star customer rating.*
>
> *Donna owns the schedule and the capacity numbers, with no day booked beyond what trained crews can finish—measure: same-day resolution raised from the team's 87% to 95%, reported every Monday.*
>
> *He had a team of six technicians. He had revenue hitting a $1.2 million run rate.*

Absence	Dates	Service, revenue and quality held?	Calls to you, and why	What broke, and the rule built
14-Day Test or Full-Cycle Test	*Plan: weeks twelve and thirteen. Run on one piece (the schedule) only*	*On the second run, the schedule held without him. Whole business: "Steve had not yet run the 14-Day Test."*	*Donna logged every question she would once have brought him; most were about old systems the vans were not stocked for*	*A rule for who took them: Miguel took the hard cases, under clear priority and escalation rules*
Steve's Fridays, then Thursdays (year three, before the systems)	*In his third year*	*No: "Three months later, revenue was down 15%. Costs were up 20%."*	*He had told Miguel, "Call me if the building burns down."*	*Miguel covered for late technicians and gave discounts; Steve took the crew back. Book's rule: "You cannot hand the work to people until the process is written down for them to follow."*

3 The Work Now

THE WORK NOW 3

Rehearse the 14-Day Test with a three-day absence, then a five-day one, and build a rule for whatever broke.

To stage either, name one person who can reach the leader and agree in advance what counts as a fire. It passes if service, revenue and the quality measure hold and named people market, sell and deliver without calling.

The 14-Day Test, or the Full-Cycle Test where the work turns on a longer cycle, is the usual proof of this gate, and it is a test, not a holiday: rehearse it with a three-day absence, then a five-day one, and build a rule for whatever broke.

The one person who can reach you, and what counts as a fire

MARK

The measures that must hold: service, revenue and the quality measure, with today's level

MARK

The rehearsals and the test

Absence	Dates	Service, revenue and quality held?	Calls to you, and why	What broke, and the rule built
Three days				
Five days				
14-Day Test or Full-Cycle Test				

Before you hire for Station 4

Use it on any plan that adds people ahead of demand. First say which kind of hire it is.

A hire who builds a capability: a specialist who builds the system the current Station needs, or relieves the constraint it is testing, such as an estimator who writes down how the owner prices. It can come before the work is proven, because it is how the work gets proven. It needs lines 1 and 6.

A hire who multiplies a proven capability: more people doing work that already runs to standard without you. It needs every line.

☐ Builds a capability ☐ Multiplies a proven capability

☐ 1. The Station is named. The plan says which Station the business is in, from Chapter 1, and which open gate condition the hire is meant to close.

☐ 2. The leadership gives one answer. Your senior leaders, asked separately, name the same UBP and the same Cull List.

☐ 3. The promise is kept. Hiring ahead of demand pays only on a promise customers already receive at the promised standard.

☐ 4. The work is written and owned. The work the hire will join has a written performance to train to and a named owner who decides inside it.

☐ 5. The organization can absorb it. If quality is already slipping, more people speed the slide.

☐ 6. The money lasts. On the slow case, the plan is funded until the hire works to standard.

☐ 7. The hire fits the Station. The work, the mandate and the candidate's Altitude, Aptitude and Attitude suit the Station the business is in (Chapter 3).

Answer each line with the evidence. A no tells you what to fix first: fix the line, not the job description.

A worked example

> Steve's evidence: Felix writing quotes inside agreed scope and price limits; Donna owning the schedule; crew calls to Steve falling from sixty a day toward fifteen. That was progress, not yet the gate: fifteen a day is still routine rescue.
>
> In this example, crew calls to Steve fell from sixty a day toward fifteen, and same-day resolution became the first number reviewed every Monday. That is progress toward the gate, not the gate.

Look at what the evidence is made of: counts, dates, prices, names and people's own words. None of it is an opinion about the business.

Your evidence, in the same terms: counts, dates, prices, names, words

Gate review

THE OUTCOME TO SEEK

Named people and systems that market, sell and deliver the UBP at standard, without your routine rescue.

THE GATE TO GRADUATE

Station 4 graduates when named people, working from systems, market, sell and deliver the UBP at the promised standard without your routine rescue.

Start with the earliest requirement your evidence does not yet support. The first line you cannot mark Established is where the work is.

1 A new person can be trained to that standard.

☐ Established ☐ Not yet ☐ Unknown

The evidence

MARK

Next action, owner and review date

2 Quality and revenue hold across several cycles, including when you are away; the usual proof is the 14-Day Test, two weeks completely unreachable, or the Full-Cycle Test where the work turns on a longer cycle: one full cycle, such as a selling season or a bid, completed without you deciding.

☐ Established ☐ Not yet ☐ Unknown

The evidence

MARK

Next action, owner and review date

3 The core keeps improving, and the decisions that come back to you are true exceptions.

☐ Established ☐ Not yet ☐ Unknown

The evidence

MARK

Next action, owner and review date

The one-page plan

> **The question for this Station.** Station 4: Which capability will improve how we market, sell or deliver the UBP with less routine leadership intervention?

Record the graduation condition, the evidence already held and the gap to close. Choose the Big Three: up to three objectives, never more, that will change that condition, each with an owner, a measure and a review date. Everything else goes on the Not Now list.

Quarter and business or offer

MARK

Working Station and graduation condition

MARK

Evidence we already hold

MARK

Gap we will close and how we will recognize progress

MARK

The Big Three: each objective, owner, measure and review date

Objective	Owner	Measure	Review date

What we will stop or change

MARK

Resources required and next review date

MARK

THE WEEKLY CHECK-IN

Ask: What changed in the evidence or capability this week? Did we complete the action? Did it move the business toward the graduation condition? If it did not, distinguish a missed action from a weak assumption or an unsuitable method. Record the next decision.

This page is the Field Manual's 90-Day Plan, Chapter 2.

Graduation sign-off

A calendar, a headcount or a finished worksheet does not pass a gate; the market and the numbers do.

- [ ] Gate line 1 established, with the evidence on page 14
- [ ] Gate line 2 established, with the evidence on page 14
- [ ] Gate line 3 established, with the evidence on page 14

Date

Reviewed by, separately, and compared

Navigator's tip: complete the check separately, then compare the evidence behind your conclusions. The disagreement often reveals the decision the two of you need to make.

What carries forward: the evidence, the commitments and the open questions

> Next: Station 5 Workbook.

Go back to the earliest gate you can no longer prove and repair it deliberately: a Regression, which is discipline, not failure.

An AI interview

OPTIONAL

An AI assistant can play the adviser who keeps asking for the example. It cannot see your business, and nothing it says is evidence. Use it to sharpen your answers, then bring them back to these pages.

THREE RULES

1. Use labels, not names. No customer's or employee's name, contact details or account numbers go into the chat.
2. Give it your numbers. Never let it fill a gap with one of its own.
3. Mark everything it hands back O, E, A or U before you act on it. Most of it will be A.

COPY THIS INTO THE ASSISTANT

Interview me about my business at Station 4, Systematization, as the Pendulum Series defines it. The gate for this Station: Station 4 graduates when named people, working from systems, market, sell and deliver the UBP at the promised standard without your routine rescue. 1. A new person can be trained to that standard. 2. Quality and revenue hold across several cycles, including when you are away; the usual proof is the 14-Day Test, two weeks completely unreachable, or the Full-Cycle Test where the work turns on a longer cycle: one full cycle, such as a selling season or a bid, completed without you deciding. 3. The core keeps improving, and the decisions that come back to you are true exceptions. Judge only against that gate, and say so when a question goes beyond it. Ask one question at a time. When my answer is vague, ask for a specific example: a date, a number, what a buyer actually said. Keep four lists apart: what I observed, what I estimated, what I assumed, and what I don't know. When I answer with a hope, say so and ask what record would settle it. Use only what I tell you: no invented numbers, competitors or customer opinions. Start with: "Which decisions came back to you last week, and why?" Cover each recurring decision and what was missing: a rule, information, skill or authority; who owns marketing, selling and delivery, and the limits they decide inside; the measure that stays average where I am not; how a new person is trained to the standard; the three-day and five-day rehearsals and what broke. After about ten questions, give me the three dependencies that cost the most; the rule, owner or training each one needs; a plan for the next rehearsal, with the one person who can reach me and what counts as a fire; the first gate line my evidence does not yet support.

What it surfaced that you had not written down, marked O, E, A or U

What a good interview sounds like

A sample interview. The questions show how the assistant should press; the answers come from Steve's story in the books, some in the words of the people around them. Notice where it stops at a hope and asks for the record.

Which decisions came back to you last week, and why?

> *In the first month, he logged more than forty recurring decisions in a week, and sixty calls a day from his own crew, with their causes.*

For the schedule, what was missing: a rule, information, skill or authority?

> *Donna's week at his elbow moved the standard and the information. Her overtime limit moved the authority.*

How is a new technician trained to the standard?

> *Steve's "Certainty Checklist" wasn't a list. It was a 15-page manual with photos, scripts, and troubleshooting guides. That's why new technicians could match his quality within 30 days.*

What happened when you added people and ads ahead of the training?

> *"You don't have a lead problem," Michael said. "You have a delivery problem. You proved delivery with the crew you trained yourself. You have not proved it with the new one."*

Crew calls are down to fifteen a day. Is that the gate?

> *That was progress, not yet the gate: fifteen a day is still routine rescue.*

When are the rehearsals?

> *Absence tests in week nine (three days), week ten (five), and weeks twelve and thirteen (fourteen).*

Before your call

Your next conversation. Use it to examine one decision, not to tour the whole workbook.

A 30-minute call. We'll place your business on its Station and name the gate you haven't yet passed. Then we'll agree on the one move that matters most now. There's no obligation.

A Station mastermind. A group of business leaders at the same Station, working through the same gate.

A retreat or other event. In person or virtual.

What would graduating from this Station change for the business? Name it in money, risk, customers or your time.

Which gate line can you not yet mark Established, and what evidence is missing?

The one move you want to examine: the decision, the evidence it needs and when you could review it.

Bring the gate review, the Friction Score and the one-page plan from this workbook.

The Pendulum System: thependulumsystem.com