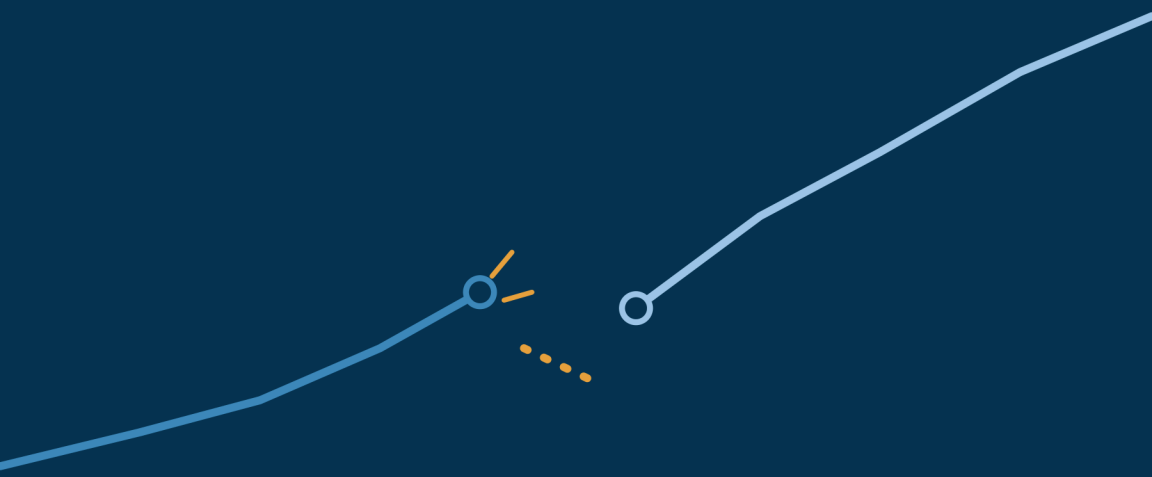
THE MTI OS

FIELD GUIDE



When Growth Breaks Your Business

7 tools to get your team running without you, starting this week.

Brian Munroe

THE MTI OPERATING SYSTEM

BEFORE YOU START

The part nobody sees

It's Sunday night. Your family is watching a movie, and you're on your phone answering a question your manager could have handled on Friday.

At your last peer group meeting, someone asked how business was going. You said "busy, but good." You've been saying that for 2 years.

You built this. You had the idea, took the risk, and made payroll when it was tight. For a while the business ran on your energy, and it worked.

Then it grew. A second location. 20 more people. Bigger clients. Somewhere along the way the business got bigger and you got smaller inside it.

Leads go cold because nobody called them back. Your best manager quits and takes half the process with her, because it only ever lived in her head. Every decision still lands on your desk. Your team waits on you, you resent them for it, and then you feel guilty for resenting them.

> **Some nights you wonder if you're the problem.**

You aren't. Growth broke the system that got you here. The way you ran things at 10 people was right for 10 people. At 40 it snaps. At 100 it snaps again.

That's fixable. This book gives you 7 tools to start this week, each one aimed at something you already want: a team that does its job, numbers you trust, and your evenings back.

BEFORE YOU START

What you actually want

You may not know exactly what's broken. You know exactly what you want.

Put a check next to every line that's true for you.

- [ ] My team does their jobs without me checking on them.
- [ ] I can take a full week off and come back to a business that ran fine.
- [ ] I know our numbers without asking anyone.
- [ ] My best people stay.
- [ ] Clients get the same great experience no matter who they talk to.
- [ ] I make more money without working more hours.
- [ ] I stop being the bottleneck.
- [ ] "Great" is the honest answer when someone asks how business is going.
- [ ] I get my evenings and weekends back.

Every tool in this book goes after at least one of these. You'll see which one at the top of each chapter.

What it's costing you right now

WORKSHEET

Be honest. Nobody sees this but you.

Hours a week you spend on things someone else should handle	
What an hour of your time is worth Your pay plus profit, divided by 2,000, is a fair start.	
Weekly cost Hours × rate	
Yearly cost Weekly cost × 50	

Example: 15 hours a week at $150 an hour is $2,250 a week, or $112,500 a year. That's the salary of a strong operations manager. You're already paying it. You're just doing the job yourself.

Now the part that doesn't fit on a line. If you had those hours back every week, what would you do with them?

FINISH IT

I would _____

_____

Keep that answer in mind. It's the reason to finish this book.

Run a practice or clinic? The free Hidden Money calculator shows where your practice is leaking cash, in about 5 minutes. mtios.ai/hidden-money/practice

ABOUT THE AUTHOR

Who I am

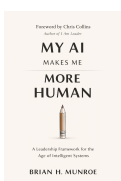


I'm Brian Munroe, founder of MTI Global Group.

For more than 30 years, I've been the person companies call when something is going wrong. I've sat across from owners who hadn't taken a real vacation in 5 years. I've watched leadership teams argue about how their own business works. I've seen what happens when the one person holding it all together finally quits.

I wrote the Rescue My Project methodology. Today I work as a fractional COO for founders and leadership teams with 10 to 200 people. Every tool in this book comes from that work.

30+	150+	10 to 200
years leading operations	rescues in healthcare, finance, tech and government	people in the companies I work with



ALSO BY BRIAN

My AI Makes Me More Human

A leadership framework for the age of intelligent systems. Foreword by Chris Collins, author of I Am Leader.

I'm a certified John Maxwell leadership trainer with PMP, CSM and CSPO certifications. The tools in the next 7 chapters are the same ones I use when I walk into a business that broke.

BEFORE YOU START

How to use this book

Each chapter starts with something you want and ends with something you can do today.

1
The want
What this chapter gets you.

2
Sound familiar?
A moment from your week.

3
What's really going on
The cause underneath it.

4
What it's costing you
Now, and a year from now.

5
Do this today
One tool and a worksheet, 15 to 30 minutes.

6
What you get back
Your week after the fix.

Grab a pen. You can finish the whole book in an afternoon, or one chapter a day for a week.

> **Do them in order. Each tool feeds the next one.**

If you have a leadership team, do chapters 2 through 6 with them in the room. The arguments are where the value is.

CHAPTER 1

01

Stop fighting the same fire every week

THE 5 RESCUE QUESTIONS · FROM MINING

WHAT YOU WANT

To stop being the firefighter, and to fix something once.

SOUND FAMILIAR?

It's Tuesday and billing is behind again. You fixed it in March. You fixed it again in June. Your office manager tells you about it the way people report the weather, flat and tired. She stopped expecting it to change a long time ago.

WHAT'S REALLY GOING ON

You keep fixing the loudest problem, and the loudest problem is rarely the first one that broke. A billing mess is often an intake problem upstream. A sales slump is often a delivery problem that quietly stopped the referrals. Find the first break and several symptoms usually go with it.

The harder part is your team. When the same fire comes back every month, people stop reporting it. They've decided nothing will change, and they're protecting their energy. That silence is the most expensive thing in your business, and it doesn't show up on any report.

WHAT IT'S COSTING YOU

Now. Say the same fire takes 3 hours a week of your time and 5 of your team's. That's 400 hours a year on one problem you've already "fixed."

In 12 months. Your team has stopped telling you about problems at all. You find out from an angry client or a bad review.

Do this today on the next page →

The 5 rescue questions

15 MINUTES

Set a timer. Answer each one in a sentence or two. Write what's true today, the version you'd never say out loud at the peer group.

1 **What's the system that broke first?**

2 **What are you firefighting every week that used to run itself?**

3 **What did the company do well at half this size that it can't do reliably now?**

4 **Where is money or time leaking that nobody is tracking?**

5 **What's the next thing likely to snap if nothing changes?**

Run a practice or clinic? The free Hidden Money calculator helps answer question 4.

FINISH IT

Circle the answer that costs you the most. Then finish this sentence:

Our biggest break is _____, and it costs us about $ _____ a month.

WHAT YOU GET BACK

The fire stays out. A month from now your office manager walks in with a new problem, and that's good news. It means the old one is gone and she believes things can change again.

CHAPTER 2

Stop losing clients in the handoffs

02

THE 3-CLIENT TRACE | FROM MASTERING

WHAT YOU WANT

Clients who stay, buy again and send their friends, so you make more without chasing more.

SOUND FAMILIAR?

A client you really liked didn't renew. When you called, she said, "Honestly? After the first month it felt like nobody knew who I was." You thought onboarding was fine. Your front desk thought sales had it. Sales thought the front desk had it.

WHAT'S REALLY GOING ON

Every client takes the same path: they hear about you, reach out, buy, get onboarded, get served, and then come back, refer someone or leave. Every step has a handoff, and most leaks hide there.

Each person on your team did their part, and the client fell into the gap between the parts. Nobody owns the gap, so nobody sees it until a client complains or quietly disappears.

When I map the client path with a leadership team, the room always disagrees about how it works. That disagreement is the finding.

WHAT IT'S COSTING YOU

Now. Lose 2 clients a month who are each worth $3,000 a year, and that's $72,000 a year walking out the back door, before the referrals they would have sent you.

In 12 months. You're spending more on marketing to replace the clients you're quietly losing.

Do this today on the next page →

The 3-client trace

30 MINUTES

Pick your last 3 clients. For each stage, write how long it took and anything that went wrong. Pull the real dates from your CRM, inbox or calendar. Map what actually happened to real clients.

Stage	Client A	Client B	Client C
First contact			
First conversation			
Signed or paid			
Onboarded			
First result delivered			
Renewed, referred or left			

FINISH IT

Mark the stage where at least 2 of the 3 stalled, waited, or needed you personally.

The stage where clients stall most is _____.

Starting this week, it's owned by _____.

WHAT YOU GET BACK

A client tells a friend about you without being asked. Your team knows where every client is and who has them next, and you stop being the one who catches what everyone else dropped.

CHAPTER 3

Know the business is on track without asking

03

YOUR 3 DIAMONDS | FROM MASTERING

WHAT YOU WANT

To know where things stand in 30 seconds, and to trust your team to keep it there.

SOUND FAMILIAR?

First morning of your vacation. You check the bank balance from the pool chair. Then you text your manager: "How are we doing this week?" She writes back "Good!" You don't quite believe her, and she can tell.

WHAT'S REALLY GOING ON

You don't have a handful of numbers that tell the truth, each with one person who owns it. In the MTI OS we call those numbers Diamonds.

When a number belongs to everyone, nobody moves it. Shared ownership feels like teamwork and works like no ownership at all. In almost every rescue I've run, the most important number had 2 or 3 "owners," and none of them felt accountable for it.

Here's what owners miss: your team wants to win. They just can't see the scoreboard. Give someone a number that's theirs and watch how hard they work to move it.

WHAT IT'S COSTING YOU

Now. You find out something slipped when it's already expensive: a cash crunch you could have seen 6 weeks earlier, a bad sales month you notice in week 3.

In 12 months. You're still the only person who watches the numbers. That makes you the only person who can't leave.

Do this today on the next page →

CHAPTER 3 · DO THIS TODAY

Your 3 Diamonds

20 MINUTES

Pick the 3 numbers that would change the business most if they moved this quarter.

Ideas: new clients a month · days to onboard · on-time delivery · client retention · gross margin · days of cash on hand

Number	Today	Target in 90 days	One owner	Checked how often
1				
2				
3				

FIRST MOVE FOR EACH NUMBER

1

2

3

FINISH IT

One name per row. If you wrote your own name on all 3, keep the one only you can move and hand off the other 2 this week.

WHAT YOU GET BACK

On Monday morning you look at one page, see 3 numbers on track, and put your phone away. Before long your team brings you the numbers before you ask, because now they care how the week went too.

CHAPTER 4

Get the right people in the right seats

04

THE SEAT CHECK | FROM MENTORING

WHAT YOU WANT

A team that does its job without you, and your best people still here next year.

SOUND FAMILIAR?

You promoted your best clinician to manage the others, because she was the best. Six months later she's miserable, the schedule is a mess, and she's started talking about leaving.

Meanwhile Maria at the front desk is quietly running scheduling, billing follow-up and new-hire training. None of it is her job. She looks tired in a way that worries you.

WHAT'S REALLY GOING ON

Two problems hide here. The first is a good person in the wrong seat. You promoted her for one skill, and the new job needs others. The seat doesn't fit her, and she knows it.

The second is the job nobody really has. When a company outgrows its structure, 1 or 2 people end up holding it together without anyone deciding they should. They burn out first, and when they leave, half the business walks out with them.

Before you blame the person, check the seat. Usually nobody wrote down what it owns or what it can decide.

WHAT IT'S COSTING YOU

Now. 8 weeks with a key seat empty, at 10 of your hours a week, is 80 hours of your time before recruiting and training.

In 12 months. The person holding it all together has left. You find out how much she was really doing the week after she's gone.

Do this today on the next page →

The seat check

30 MINUTES

One row for each key role. Fill it in by role first, then by name. If one name shows up in several rows, that's your first finding.

Role	Who's in it	What they own	Can decide alone	Number that says it's working	Good at it?	Energized by it?	Has the time?

1 **Who is doing more than one job right now?**

2 **Who has a "no" in any of the last 3 columns?**

FINISH IT

Pick one person carrying a job that isn't theirs. This week, write that job down and decide who owns it from now on, or that you'll hire for it. Then thank them. They've been holding it together.

WHAT YOU GET BACK

Your best people stop browsing job postings. Everyone on the team can say in one sentence what they own, and nobody has to guess what you expect from them.

CHAPTER 5

05

Get your team to stop asking you

AREAS OF APPROVAL | FROM MAXIMIZING

WHAT YOU WANT

To stop being the bottleneck, and to get through a whole Saturday without your phone.

SOUND FAMILIAR?

You're at your daughter's soccer game. Your phone buzzes 4 times in the first half: a refund, a schedule swap, a supplier question, and "quick question, sorry to bug you." Your team could have handled every one. You answer all 4, because if you don't, nothing moves.

WHAT'S REALLY GOING ON

Your team keeps asking because nobody ever told them what they're allowed to decide. They're being careful. Every time they guessed wrong in the past, they heard about it, so now they check with you first.

I once watched a front desk manager wait 3 days for the owner to approve a $40 refund. The client was angry by day 2. The owner had no idea it was waiting. Once the limits were written down, she handled it in 2 minutes.

If every decision waits for you, the business moves at the speed of your inbox.

WHAT IT'S COSTING YOU

Now. Say it's 40 interruptions a week at 10 minutes each. That's almost 7 hours a week, or about 8 full work weeks a year spent being your team's permission slip.

In 12 months. Your best manager leaves, because nobody good stays in a job where they can't make a decision. You hire the next one and train them to ask you too.

Do this today on the next page →

Areas of approval

20 MINUTES

1
Do it, don't tell me.

2
Do it, then tell me.

3
Don't do it until we talk.

Most decisions belong in the first 2. List 10 decisions people brought to you last week. Pick the level each should sit at from now on, and who owns it.

#	Decision	Who asked	Level	Owner from now on
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				

FINISH IT

Pick one person and tell them this week which decisions are now theirs. Say it out loud: "You don't need to ask me about these anymore." Watch their face when you do.

WHAT YOU GET BACK

You watch the whole game with your phone in your pocket. On Monday your team tells you what they decided, and most of it is what you would have done.

CHAPTER 6

Hear bad news while it's still small

06

THE 30-MINUTE WEEKLY MEETING | FROM MENTORING

WHAT YOU WANT

No more Friday-afternoon surprises, and a team that solves problems before they reach you.

SOUND FAMILIAR?

Friday at 4:30, your operations lead tells you one of your biggest clients has been unhappy for 6 weeks. You ask why nobody said anything. She says, "We thought we could fix it before you found out."

WHAT'S REALLY GOING ON

Your team hides bad news when there's no safe, regular place to bring it. If problems only come up when you happen to ask, people learn to wait and hope.

A short meeting, same day, same time, same agenda, every week, gives bad news somewhere to go while it's still small. Hold it even when it feels like there's nothing to discuss. Those are usually the weeks something is being hidden.

How you react the first time someone brings you a problem makes or breaks it. Everyone is watching to see if it's safe.

WHAT IT'S COSTING YOU

Now. A problem caught in week 1 is a 10-minute conversation. The same problem caught in week 6 can cost you the client, and every referral that client would have sent.

In 12 months. You've lost 2 or 3 clients you could have kept, and your team has learned that hiding works.

Do this today on the next page →

The 30-minute weekly meeting

15 MIN TO SET UP

Use this agenda as written for 4 weeks before you change anything.

Time	Item	What happens
5 min	Wins	One good thing from each person. It sets the tone.
5 min	Numbers	Your 3 Diamonds from chapter 3: on track or off track. No discussion yet.
5 min	Priorities	Each owner: on track or off track.
12 min	Issues	Pick the top 1 or 2. Decide what to do and who owns it.
3 min	Recap	Who does what, by when.

START THE ISSUES LIST: WHAT'S ALREADY ON IT?

1

2

3

DAY AND TIME

WHO ATTENDS

WHO RUNS IT

WHERE THE NUMBERS LIVE

FINISH IT

Put the first one on the calendar for next week before you turn the page. When someone brings bad news in that meeting, thank them.

WHAT YOU GET BACK

Bad news shows up on Tuesday as one line on the issues list, small enough to fix in 10 minutes. You walk out of that meeting knowing the week is handled.

CHAPTER 7

Make it stick

07

THE 90-DAY REVIEW | FROM MONITORING

WHAT YOU WANT

Change that lasts this time, and proof that it's working.

SOUND FAMILIAR?

You've tried this before. New year, big push, everybody fired up. By March the weekly meeting got skipped twice, nobody updated the numbers, and you were back to answering every question. This time your spouse asks, gently, "Is this one going to stick?"

WHAT'S REALLY GOING ON

Most improvement efforts fade within a few months. Old habits come back quietly, and nobody notices until the fires return.

The teams that get better every quarter have a date on the calendar to check themselves. They look at what happened, without blame, and adjust. The teams that stall skip the review when the results look bad, which is exactly when they need it. A missed target is information.

WHAT IT'S COSTING YOU

Now. Every push that fades costs you the time you put in. It also teaches your team that the next one won't last either, so they wait it out.

In 12 months. You're back where you started, and your team rolls their eyes at the next big idea.

Do this today on the next page →

The 90-day review

5 MIN NOW

Put a date on your calendar 90 days from today. On that day, answer these with your team.

1. **What did we plan to get done?**

2. **What actually happened, and why?**

3. **Did the break from chapter 1 come back, or did a new one show up?**

4. **Is anyone from chapter 4 still carrying a job that isn't theirs?**

5. **What will we start, stop and keep doing for the next 90 days?**

FINISH IT

Write the date here, and book it now.

Our 90-day review is on _____, with _____ in the room.

WHAT YOU GET BACK

In 90 days you sit down with your team and see what changed, in real numbers. The next time someone at the peer group asks how business is going, you tell them, and you mean it.

WHAT'S NEXT

You just ran a small version of the MTI OS

If you filled in the worksheets, you've already done the first pass. Each chapter is a piece of one of the MTI OS's 5 sessions. The full install goes deeper on each one, with your leadership team, over about 120 days.

1. **Mining** — CHAPTER 1
   90 minutes
   Find what broke and stop the worst of the bleeding.
2. **Mastering** — CHAPTERS 2 AND 3
   1 day
   Map the client path, set the vision and give every Diamond an owner.
3. **Mentoring** — CHAPTERS 4 AND 6
   1 day
   Right people in the right seats, written playbooks, the meeting rhythm.
4. **Maximizing** — CHAPTER 5
   1 day
   Build the 90-day plan, set areas of approval and pick the work to automate.
5. **Monitoring** — CHAPTER 7
   1 day, every 90 days
   Review what happened, fix what slipped and plan the next 90 days.

After that, Monitoring repeats every quarter. That rhythm is what keeps the business from drifting back.

WHAT'S NEXT

A pattern I see again and again

A clinic owner opens a second location, then a third. Patients love them. Revenue climbs. From the outside, she's living the dream.

Then the front desk at each site starts running a little differently. Billing falls behind. She spends every afternoon driving between locations putting out fires, and every evening answering texts from staff who aren't sure what to do. She misses her son's school play for a "staffing emergency" that turns out to be a scheduling mix-up.

She hires an operations manager to take it off her plate. 6 months later he quits. On his way out he tells her, "I never knew what I was allowed to decide." She's back to doing it all, and for the first time she wonders whether she should sell.

> **Her team wanted to do good work. Nobody had told them what good looked like across 3 locations.**

The fix used the tools in this book. We followed real patients through each clinic and found where they stalled (chapter 2). We gave each number one owner (chapter 3). We fixed the seats: her strongest front desk lead took over scheduling for all 3 sites, and the job finally had a name (chapter 4). We moved the routine calls off her desk (chapter 5), started a weekly meeting (chapter 6), and booked a 90-day review (chapter 7).

Six months later, she took her first full week off in 4 years. The clinics ran. The texts didn't come.

I've watched this story play out in clinics, manufacturers, franchises and service firms. The industry changes. The pattern holds.

WHAT'S NEXT

Ways to install it

The worksheets in this book are a start. When you're ready for the whole system, pick how much help you want.

START FREE

Mining with the AI facilitator

Run the full 90-minute Mining session tonight. The AI facilitator asks the questions, keeps the clock and writes up what you said. Free for 14 days, no card needed. Start free with Mining

Best if you want to find what broke this week, without talking to anyone yet.

AI-FACILITATED

The AI facilitator runs every session

All 5 sessions with your team, step by step. It remembers what your team said and writes the record after every module.

Best if you want a facilitator in the room without a consultant's invoice.

SELF-LED

Run it yourself

All 5 workbooks and facilitator guides. One leader inside your company runs the sessions.

Best if you have a strong COO, operations lead or integrator.

BRIAN-FACILITATED

I lead your team

I lead your leadership team through every session, virtually or on site.

Best if the business is badly broken, or your leaders are too stretched to run it themselves.

Plans and pricing: mtios.ai/ai-facilitated

WHAT'S NEXT

Picture a Tuesday, 6 months from now

You check 3 numbers on one page, and they're on track.

The weekly meeting runs without you having to push it. Your office manager handles a refund, a schedule change and an unhappy client before lunch, and tells you about it afterward.

Your best people are still here, and they seem lighter. You leave at 5. Nobody texts you at dinner.

> **On Saturday you watch the whole game.**

That's what you're building. Go back to page 4 and read what you wrote after "I would." That's why you start this week.

YOUR NEXT STEP

Start this week

1

Start free with Mining

Run your first session with the AI facilitator tonight. Free for 14 days, no card needed.

mtios.ai/ai-facilitated

2

Not sure where to start?

Take the free Operations Assessment. About 6 minutes. It shows where your business is leaking most and which way to install the MTI OS fits you.

mtios.ai/assessment

Or talk to me directly

info@mtiglobalgroup.com
702-703-6074

Growth broke it. You can fix it, and get back the business you thought you were building.

BRIAN MUNROE · FOUNDER, MTI GLOBAL GROUP