

# The Anchor

Helping growing businesses stay focused, organized, and moving forward.

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## ***Are You the Bottleneck in Your Business?***

*When every decision, customer question, project issue, and next step depends on you, growth eventually slows down.*

## **Take the 2-Minute Drift Score**

See where operational strain may be slowing your business down.

Scan for your free Drift Score.

Takes 2 minutes.



## **When Everything Depends on You**

Most businesses begin with an owner who does almost everything.

You answer the phone. You meet with customers. You prepare estimates. You solve problems. You make decisions. You follow up. You make sure the work gets done.

In the beginning, that's not necessarily a problem.

It's often how a business gets started.

You know every customer. You know every project. You know what needs to happen next. And because you're involved in almost everything, you can keep the business moving.

Then the business begins to grow.

There are more customers.

More employees.

More projects.

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## Feature Article

# The Anchor BOS

## What Does a Business Operating System Actually Do?

"Build better systems" sounds good.

But what does that actually mean?

For a growing business, an operating system isn't necessarily complicated software or a thick operations manual.

It's the structure that helps your business answer some very basic questions consistently:

**What needs to be done?**

**Who is responsible for doing it?**

**What happens next?**

**What needs attention?**

**How do we know if it was completed?**

When those answers exist primarily in the owner's head, the owner becomes the operating system.

That may work for a while.

Eventually, it doesn't.

## Your Business Already Has a System

Every business has a way of operating—even if nobody designed it.

A new lead comes in and *something* happens.

A customer approves an estimate and *something* happens.

An employee has a question and *something* happens.

A project falls behind and *something* happens.

The question isn't whether you have systems.

The question is whether those systems are **intentional, consistent, and visible—or whether they depend on people remembering what they're supposed to do.**

## What a Good Operating System Creates

A practical business operating system brings the important pieces of the business together.

It can help create:

**Visibility** — You can see what's happening without chasing people for updates.

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**Accountability** — Responsibilities have owners, deadlines, and defined next steps.

**Consistency** — Important work happens the same way regardless of how busy everyone becomes.

**Communication** — Employees know where to find information and when something requires attention.

**Follow-Through** — Leads, customers, projects, and commitments don't quietly disappear.

**Decision Support** — The right information reaches the right person at the right time.

The goal isn't bureaucracy.

The goal is to make the business **easier to operate**.

## That's the Idea Behind The Anchor BOS

**The Anchor BOS** is AnchorPoint Concierge's approach to building a Business Operating System around the **way** your company actually works.

We don't begin with a predetermined collection of software and force your business into it.

We begin with the business.

Where is work getting stuck?

Where are opportunities being lost?

What information is difficult to find?

What depends too heavily on the owner?

Where is communication breaking down?

What are employees repeatedly trying to figure out?

Then we design the systems needed to address those problems.

Depending on the business, that could include systems for leadership and priorities, sales and lead management, operations and project execution, customer communication, administration, people, business intelligence, AI-assisted workflows, or other areas unique to the organization.

## The Objective Is Simple

A good operating system shouldn't make your business more complicated.

It should make running your business simpler.

You should be able to spend less time asking:

*"Where does that stand?"*

*"Did anyone follow up?"*

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# AI Corner

## Stop Chasing Updates

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One of the most common questions growing business owners ask throughout the day is:

**“Where do we stand on this?”**

Where does that estimate stand?

Did anyone follow up with the customer?

Are we still waiting on the supplier?

What's holding up the project?

Did that issue ever get resolved?

When information is scattered across emails, text messages, notes, spreadsheets, and conversations, the owner often becomes the person responsible for putting the pieces together.

That takes time.

More importantly, it makes the business dependent on the owner's ability to constantly monitor everything.

## AI Can Help Organize the Noise

Imagine that instead of spending Monday morning searching through updates, you received a simple summary:

### Needs Your Attention

- Customer approval needed on Project A
- Supplier delay could affect Friday's installation
- Two estimates have been outstanding for more than seven days

### Waiting On

- Permit approval — Project B
- Material delivery — Project C
- Customer decision — Estimate #1047

### Completed

- Project D inspection passed
- Customer E follow-up completed
- Vendor pricing received

### Next Actions

- Call Customer A

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- Approve revised material order
- Review two overdue estimates

AI is particularly good at taking information and **organizing it into something useful.**

But there's an important catch.

## AI Needs a System to Work With

AI cannot magically know what's happening inside your business.

The information first has to be captured somewhere consistently.

That's why AI works best when paired with good operating systems.

Your team updates the work.

Your systems capture the information.

AI helps summarize and surface what matters.

**You make the decisions.**

That's a much better use of AI than simply asking it to generate more content.

## Start Small

Pick one recurring question you find yourself asking every day or every week.

Maybe it's:

**“What are we waiting on?”**

Instead of answering that question manually every time, create one place where those items are tracked consistently.

Then use AI to help turn that information into a concise weekly summary.

The objective isn't to remove you from your business.

It's to remove the need for you to **hunt for information your business should already be able to provide.**

## The Bigger Idea

The real power of AI for a growing business isn't simply doing things faster.

It's helping the right information reach the right person at the right time.

And sometimes the best way AI can help an owner lead is surprisingly simple:

**Stop making the owner ask.**

## System in Focus

# The 15-Minute Leadership Dashboard

Growing businesses don't usually suffer from a lack of things to do.

They suffer from too many things competing for attention at the same time.

Customers need answers. Employees need decisions. Projects need attention. Leads need follow-up. Vendors need responses.

Before long, the owner becomes the place where all of those competing priorities meet.

A simple leadership dashboard can change that.

## You Don't Need to Track Everything

A useful dashboard should help answer five questions:

### 1. What are our top priorities?

Identify the three to five things that matter most right now.

### 2. What needs my attention?

Separate the decisions that genuinely require the owner from routine work the team can handle.

### 3. What are we waiting on?

Customer approvals, permits, vendor responses, payments, materials, proposals—anything preventing work from moving forward.

### 4. What's at risk?

Projects falling behind, overdue follow-ups, customer issues, cash concerns, staffing problems, or approaching deadlines.

### 5. What happens next?

Every important item should have an owner, a next action, and when appropriate, a due date.

## One View. Fifteen Minutes.

The dashboard doesn't need to be sophisticated.

It could begin as a spreadsheet, project-management board, CRM view, or another tool your team already uses.

What matters is that the information is **visible and current**.

Then establish a simple rhythm.

Spend 15 minutes at the beginning of the day—or at another consistent time—reviewing the dashboard.

Don't use that time to solve everything.

Use it to determine:

**What requires my attention?**

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## Operational Toolbox

# Three Things You Can Stop Carrying Yourself

If you're the person everyone depends on for answers, approvals, follow-up, and direction, the solution isn't simply to work faster.

It's to determine which responsibilities really require you—and which ones your business should be able to handle without you.

Here are three places to start.

## 1. Stop Being the Keeper of Every Next Step

If employees have to ask you what happens next on every project, customer, or opportunity, you're not just making decisions.

You're managing everyone's memory.

Create a simple system that shows:

- What needs to happen next
  - Who is responsible
  - When it is due
  - What is waiting on someone else
  - When something needs your attention
- Your team shouldn't need to find you to learn what happens next.

**The system should tell them.**

## 2. Stop Personally Remembering Every Follow-Up

Business owners often carry an enormous invisible list:

*Call John back.*

*Check on that estimate.*

*Follow up with that customer.*

*Ask the supplier about delivery.*

*Contact that prospect next week.*

Eventually, something gets forgotten.

Instead, put every follow-up into one trusted system with an owner and a date.

Whether it's a CRM, task manager, spreadsheet, or another simple tool matters less than one principle:

**Don't depend on memory to run your business.**

## 3. Stop Answering the Same Questions Over and Over

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If your team repeatedly asks:

*How do we handle this?*

*Where is that information?*

*What do I tell the customer?*

*Who approves this?*

*What happens when... ?*

Pay attention.

Repeated questions are often telling you where a process needs to be documented.

You don't need a 100-page operations manual.

Start with the questions you answer most frequently. Turn the answers into a checklist, template, standard operating procedure, decision guide, or simple workflow.

The next time the question comes up, your answer can become:

**"It's in the system."**

## **Drop Anchor This Week**

### **Find One Thing Your Business Should Stop Depending on You For**

Set aside 30 minutes this week.

Take a sheet of paper—or open a blank document—and answer one question:

**What does my business depend on me to do, remember, approve, or explain that it shouldn't?**

Don't overthink it.

Start making a list.

Maybe you're the only person who knows:

- Which customers need follow-up
- Where every project stands
- How estimates are prepared
- Which bills need attention
- What happens when a customer complains
- Which leads haven't been contacted
- How a recurring task gets completed
- What everyone should be working on next

Now look at your list and choose **one item**.

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More decisions.

More things competing for your attention.

But the way the business operates doesn't always grow with it.

The owner is still approving every decision. Employees still come to you when they aren't sure what to do. Customers still expect you to have the answer. Important information still lives in your head. When something goes wrong, you're the person everyone calls.

Eventually, the very thing that helped build the business begins limiting it.

**You become the bottleneck.**

That's not an indictment of the owner. It's a sign that the business has reached a different stage.

What worked when you had five customers may not work with fifty.

What worked with two employees may not work with ten.

And working harder isn't a sustainable solution.

The answer is to begin moving the business from **owner-dependent to system-supported**.

Clear responsibilities.

Repeatable processes.

Defined next steps.

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Not five.

One.

Ask yourself:

**Could a simple checklist, process, template, dashboard, automation, or clearly assigned responsibility allow this to happen without depending entirely on me?**

If the answer is yes, spend the rest of your 30 minutes creating the first version.

It doesn't have to be perfect.

It simply needs to move one piece of your business **out of your head and into a system**.

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**What can someone else handle?**

**Where are we stuck?**

**What needs to move today?**

## From Managing Everything to Managing Exceptions

This is where a good system begins changing the owner's role.

Without visibility, the owner has to monitor everything.

With visibility, the owner can focus on the things that are **off track, unusually important, or actually require leadership.**

The routine work keeps moving through the system.

The exceptions rise to your attention.

That's a very different way to operate.

Instead of spending the day asking:

*"What's going on?"*

You can spend more time asking:

**"Where do I need to lead?"**

## Try It This Week

Create a single page with five headings:

**PRIORITIES | NEEDS MY ATTENTION | WAITING ON | AT RISK | NEXT ACTIONS**

Don't try to build the perfect dashboard.

Use it for one week.

At the end of the week, ask yourself one question:

**Did I spend less time trying to figure out what was happening?**

If the answer is yes, you've just experienced what a simple operating system can do.

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## Before You Finish

Write down:

**What:** What are you removing from yourself?

**Who:** Who should own it going forward?

**How:** What system will help them do it consistently?

**When:** When will you put the new process into use?

Then stop. You've done enough for one week.

The objective isn't to redesign your entire business in 30 minutes.

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*“Who’s handling that?”*

*“What are we waiting on?”*

*“Why didn’t I know about this?”*

And more time deciding:

**Where are we going next?**

Because the ultimate purpose of The Anchor BOS isn’t to replace the owner.

**It’s to build a business that doesn’t require the owner to carry everything.**

## Where Is Your Business Drifting?

The **Drift Score** takes about two minutes and can help identify where your business may be experiencing operational strain.



**Take the 2-Minute**

**Drift Score →**  
*QR code*

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Better communication.

Information that doesn’t live in one person’s head.

Systems that allow other people to make appropriate decisions and keep work moving without waiting for the owner.

That doesn’t make the owner less important.

It allows the owner to spend more time doing the things only the owner can do—leading, building relationships, developing opportunities, making strategic decisions, and determining where the business goes next.

Growth shouldn’t require you to carry more and more of the business yourself.

Sometimes the next stage of growth begins by building a business that can carry more of itself.

**That’s what we’ll explore in this issue of *The Anchor*.**

## Closing Note

Growth creates opportunity—but it also creates complexity. As your business grows, the systems supporting it need to grow with it.

You don’t have to fix everything at once. Start with one bottleneck. Build one better system. Then move to the next.

**Stay focused. Stay organized. Keep moving forward.**

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*AnchorPoint Concierge helps growing businesses reduce Business Drift by building practical systems around the way they actually work.*

Not sure where to begin? Take the **2-Minute Drift Score** or **Start a Conversation** with us.

**When business starts to drift, Drop Anchor.**