

BSP

Q1 2026 Engagement Summary

Organizational Alignment Assessment & Strategic Action Plan

The Tailored Closet North San Diego

Dana & Kalani Nuesca, Owners

Engagement Period: Q1 2026

Prepared by: Business Succession Pros, Inc.

Lead Advisor: Travis Catania

Report Date: March 18, 2026

Executive Summary

The Tailored Closet North San Diego is a custom closet, garage, and pantry organization franchise serving the North San Diego area. Owned and operated by Dana and Kalani Nuesca, the business has a clear vision to achieve **\$3 million in gross revenue** by strategically focusing on past customers, prospective clients, and key partnerships with interior designers.

This report summarizes the work completed during Q1 2026, including the organizational alignment assessment, key findings, performance benchmarks, and the 90-day action plan to strengthen operations, optimize profitability, and position the business for succession—whatever that looks like when the time comes.

□ VISION

Achieve \$3 million in gross revenue by strategically focusing on past customers, prospective clients, and key partnerships with interior designers.

□ MISSION

Transform Spaces — Transform closets, garages, and pantries into beautiful, functional spaces that elevate our clients' lifestyles. **Deliver Premium Solutions** — Customized solutions that reflect creativity, organization, and luxury. **Exceed Expectations** — Exceptional craftsmanship that brings unique and personalized designs to life.

□ VALUES

Honor — Doing what is right · **Generosity** — With your time, skills, and emotions · **Transparency** — Telling the truth and being able to accept the truth · **Excellence** — Not perfection, but the pursuit

OVERALL ALIGNMENT SCORE

4.0 / 5.0

Strong organizational alignment overall

CRITICAL FINDING

Owner Gap

Kalani scored 2/5 on 5-year target while Dana and Cassidy scored 5/5

SALES GOAL

\$170K/month

Closed projects monthly target

GO-BACK RATE (URGENT)

38.1%

Up from 29.7% in 2025 — critical operational issue

Key Team Members

Dana Nuesca
Co-Owner / Design Consultant

Kalani Nuesca
Co-Owner / Design Consultant

Cassidy Thompson
Installation Manager (KEY ROLE)

Erika Llamas
Office Administrator

Current KPIs & Performance Metrics

Metric	Current Performance	Notes
Sales Goal	\$170K/month closed projects	Target for revenue growth
New Designer Goal	1 per month	Building referral network
Go-Back Rate	38.1%	CRITICAL — up from 29.7% in 2025
Organizational Alignment	4.0 / 5.0 overall	Strong team alignment
Designer Referral ROI	+\$13,860/job	Best lead source — scale this
Paid Lead ROI (Google/Yelp)	-\$23,565/job	Cut immediately — negative ROI

❑ Critical Finding: Owner Alignment Gap

Kalani scored 2/5 on both 5-year target clarity and financial metrics visibility—while Dana and Cassidy scored 5/5 on both. The manager is more aligned with one owner than the owners are with each other.

This is the #1 leadership issue to address. Without owner alignment, the business cannot execute a coherent long-term strategy.

Immediate Action: Dana & Kalani strategic alignment session (March 25) to get on the same page about 5-year vision, market positioning, and financial visibility.

Work Completed — Q1 2026

- **Organizational Alignment Assessment** — Dana, Kalani, and Cassidy assessed across 22 alignment questions. Overall score: 4.0/5.0.
- **Client Portal Built** — Comprehensive portal with KPIs, team structure, process flows, job descriptions, training programs, and resource library.
- **Job Descriptions Created** — Complete job descriptions for all positions: Co-Owner, Design Consultant, Installation Manager, Office Administrator, Installation Crew.
- **Training & Development Program Designed** — 3-tier installer certification program, sales designer onboarding, and operations training framework.
- **Calendar Established** — Management Huddles (3rd Monday monthly) and Quarterly Strategy Reviews scheduled through Q4 2026.
- **Weekly Metrics Collection System** — Automated Friday email system for submitting sales, production, and operational data.
- **Sales and Production Submission Forms** — Live on portal for team members to report weekly performance.

Priority Action Items — Next 90 Days

☐ URGENT (Week 1-2)

- **Go-back rate reduction** — 38.1% is eroding margins and damaging customer trust. Deploy Go-Back Prevention Playbook (Cassidy owns implementation).
- **Owner alignment on 5-year vision** — Dana and Kalani strategic alignment session (March 25) to resolve the 2/5 vs 5/5 gap on long-term targets.
- **Cut paid lead spend** — Google/Yelp ads are generating -\$23,565 ROI/job. Cut immediately and save ~\$120K/year.

☐ HIGH PRIORITY (Month 1)

- **Scale Designer Referral program** — Best ROI source at +\$13,860/job. Build systematic referral relationship program with interior designers.
- **Cassidy leadership development** — Key manager showing strong ownership mentality (13 operational improvements submitted). Develop for expanded responsibilities.
- **Lead source tracking implementation** — Erika to implement "How did you hear about us?" intake form to eliminate 16-job Unknown category.

☐ ONGOING (Next 90 Days)

- **Material protection protocols** — Part of Cassidy's improvements. Prevents damage-related go-backs.
- **Installer quality checklists** — Step-by-step quality checks before client sign-off to reduce errors.
- **Labor cost investigation** — Labor % jumped from 9% to 11.5% in 2026. Investigate root cause and optimize.
- **Customer feedback system** — Build post-install feedback collection to identify issues early and improve NPS.

Strategic Context & Vision

This engagement is about building a business that runs **with or without you** — real freedom, real equity, real options. We're strengthening operations, developing your team, optimizing profitability, and positioning you for succession—whatever that looks like when the time comes.

The goal is not an exit. The goal is **optionality** — the ability to step back, sell, transition to a manager, or keep running the business on your terms. All of those paths require the same foundation: strong systems, capable leadership, predictable profitability, and clear documentation.

Over the next 12-18 months, we will continue to:

- Document and systematize core business processes
- Develop Cassidy and Erika for expanded leadership roles
- Optimize margin and reduce operational inefficiencies (starting with the go-back rate)
- Build scalable lead generation systems (cut paid spend, grow designer referrals)
- Track and improve KPIs across sales, production, and customer satisfaction
- Ensure Dana and Kalani are aligned on vision, timeline, and financial expectations

By the end of 2026, the business should be running more independently, with clear metrics, capable managers, and strong profitability. From there, Dana and Kalani can decide: keep growing, transition gradually, or explore exit options with confidence.

Next Steps & Engagement Cadence

Immediate (This Week):

- Dana & Kalani strategic alignment session (March 25)
- Cassidy briefing on Go-Back Prevention Playbook deployment
- Cut paid lead spend (Google/Yelp) — coordinate with marketing contacts

Ongoing:

- **Management Huddles** — 3rd Monday of every month (Dana, Kalani, Cassidy)
- **Quarterly Strategy Reviews** — Half-day sessions with BSP team to review progress and adjust priorities
- **Weekly Metrics Collection** — Automated Friday email reminders for sales and production data submission
- **Monthly BSP Check-Ins** — Travis available for ad hoc strategy sessions, problem-solving, and guidance

Questions or need support? Reach out to Travis Catania at travis@businesssuccessionpros.com or use the **Ask Fritz** feature on your client portal for rapid research and document requests.

Confidentiality Notice: This report is prepared exclusively for Dana and Kalani Nuesca and The Tailored Closet North San Diego. It contains proprietary business information, strategic analysis, and confidential financial data. Distribution, reproduction, or disclosure to third parties without written authorization from Business Succession Pros, Inc. is strictly prohibited.

Advisory Disclaimer: This engagement summary is provided for informational and strategic planning purposes. Business Succession Pros, Inc. does not provide legal, accounting, or tax advice. Clients are advised to consult with qualified legal counsel, certified public accountants, and tax professionals for specific guidance on legal structures, tax implications, and regulatory compliance related to business succession planning.

© 2026 Business Succession Pros, Inc. · All rights reserved.