IMPLEMENTATION & OPTIMIZATION

30-Day Implementation Check-In

Fixed price: $119 **Format: 5-page sample written report** **Delivery: asynchronous**

FICTIONAL SAMPLE - NOT A REAL CLIENT

Executive snapshot

Summit Ridge Roofing, a fictional residential roofing contractor, is used to demonstrate how this service is delivered. Compare planned fixes with actual implementation and reset the next 30 days.

Primary risk

Ownership improved, but management review is not yet routine

Best next move

Make the weekly manager exception review non-optional and owner-specific.

Evidence reviewed

Original audit; action plan; current tracker/screenshots; owner updates; blockers.

What this report does

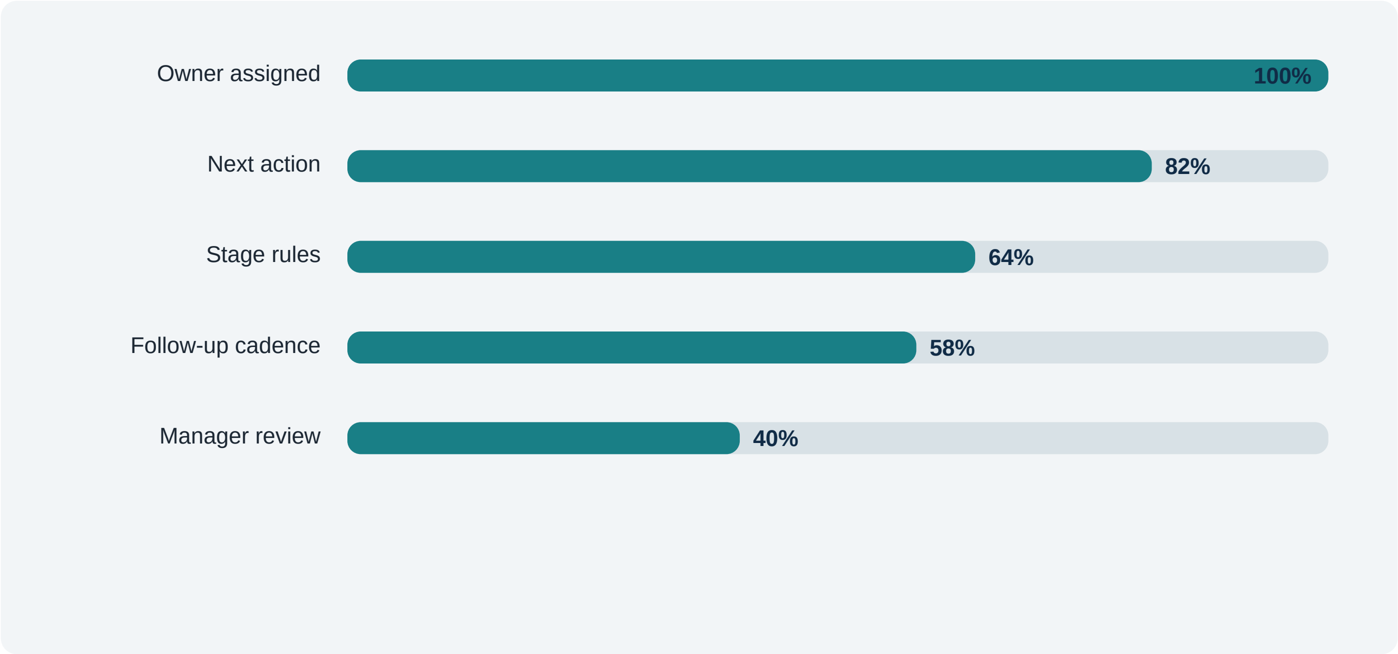
Converts the supplied evidence into prioritized operational actions without inventing ROI or revenue-loss claims.

SERVICE-SPECIFIC ANALYSIS

Current-state review

The sample analysis below uses synthetic records to show the type of evidence this service would evaluate for a real client. The numbers are illustrative, not benchmarks.

Illustrative operating data



Interpretation

All active opportunities now have an owner, but only 40% of planned weekly manager reviews occurred. Three of five reps used the new cadence consistently; two reverted to ad hoc follow-up. Several opportunities remained in Proposal Sent without a dated next action.

PRIORITY FINDINGS

What deserves attention first

Priority reflects operational risk and controllability, not a claim about financial impact.

HIGH **Ownership improved, but management review is not yet routine**

All active opportunities now have an owner, but only 40% of planned weekly manager reviews occurred.

HIGH **Follow-up discipline is inconsistent across the team**

Three of five reps used the new cadence consistently; two reverted to ad hoc follow-up.

MEDIUM **Stage definitions are understood but not enforced**

Several opportunities remained in Proposal Sent without a dated next action.

Control implication

The immediate objective is not to add complexity. It is to make the smallest number of controls visible, owned, and repeatable enough that the process can be managed consistently.

RECOMMENDED ACTIONS

30-day implementation rhythm

The sequence below is intentionally limited. Complete the control work in order, confirm adoption, and only then expand the process.

0-7 days	Make the weekly manager exception review non-optional and owner-specific.	Owner / manager
8-21 days	Require a dated next action before an opportunity can remain in an active stage.	Process owner
22-30 days	Use one shared follow-up cadence for the next 30 days before testing variations.	Manager review

Operating rules

- Assign one accountable owner for each action.
- Use a dated next action or review date.
- Measure only fields the team can maintain consistently.
- Do not add software or process complexity unless the current controls are actually being used.

NEXT-STEP ROADMAP

What to maintain, what to revisit

MAINTAIN	Keep the controls that are already producing reliable visibility. Do not change a working control simply to make the process look more sophisticated.
REVISIT	Review the high-priority finding after 30 days with the same evidence definition used in this report.
STOP / CLOSE	If the control is stable and the underlying question is answered, no additional paid service is required.
ESCALATE ONLY IF EVIDENCE SUPPORTS IT	A different service is appropriate only when a separate operational problem becomes visible outside this report’s scope.

Limitations

This sample is illustrative. A real report would use only client-supplied or client-approved evidence, state any missing fields, and avoid unsupported conclusions.