IMPLEMENTATION & OPTIMIZATION

90-Day Re-Audit

Fixed price: $149 **Format: 7-page sample written report** **Delivery: asynchronous**

FICTIONAL SAMPLE - NOT A REAL CLIENT

Executive snapshot

Northstar HVAC & Mechanical, a fictional HVAC service company, is used to demonstrate how this service is delivered. Re-run the original diagnostic against current evidence and separate durable improvement from unresolved leakage.

Primary risk

Response and ownership controls improved materially

Best next move

Keep the current response and assignment controls unchanged.

Evidence reviewed

Original audit and source files; updated 60-90 day data; current workflow; implemented changes.

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

Median response time fell and unassigned leads became rare in the sample. Aged opportunities are fewer, yet 18% of open records still have no future action. Two reps maintain the new process; one continues to carry stale opportunities forward.

PRIORITY FINDINGS

What deserves attention first

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

HIGH **Response and ownership controls improved materially**

Median response time fell and unassigned leads became rare in the sample.

MEDIUM **Pipeline hygiene improved but aged opportunities still accumulate**

Aged opportunities are fewer, yet 18% of open records still have no future action.

MEDIUM **Improvement is uneven by rep**

Two reps maintain the new process; one continues to carry stale opportunities forward.

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	Keep the current response and assignment controls unchanged.	Owner / manager
8-21 days	Add a weekly aged-opportunity exception list by rep.	Process owner
22-30 days	Re-audit only the remaining weak categories next quarter rather than repeating the full process.	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.

MANAGEMENT CONTROL

How to keep the improvement visible

1	**Owner**	One named person is accountable for the control.
2	**Evidence**	The control has a field, report, queue, or record that can be reviewed.
3	**Trigger**	A clear threshold tells the team when intervention is required.
4	**Cadence**	The control is reviewed often enough to prevent silent aging or drift.
5	**Close rule**	The team knows when a record or exception is complete.

IMPLEMENTATION CHECKLIST

30-day owner checklist

- [ ] **1.** Keep the current response and assignment controls unchanged.
- [ ] **2.** Add a weekly aged-opportunity exception list by rep.
- [ ] **3.** Re-audit only the remaining weak categories next quarter rather than repeating the full process.
- [ ] **4.** Review exceptions at the agreed cadence and record unresolved blockers.
- [ ] **5.** Compare the same operating measures at the end of the 30-day period.
- [ ] **6.** Close the initiative if the control is stable; continue only if the evidence shows a remaining problem.

Sample-report integrity note

No result shown here is a claimed client outcome. The purpose of this sample is to demonstrate report structure, analytical depth, visuals, and actionability.