

COMBINED REVIEW

Estimate Delivery & Decision-Tracking Review

Fixed price: \$129

Format: 5-page sample written report

Delivery: asynchronous

FICTIONAL SAMPLE - NOT A REAL CLIENT

Executive snapshot

ClearPath Garage Doors, a fictional garage door service company, is used to demonstrate how this service is delivered. Treat estimate delivery and post-delivery decision tracking as one control chain.

Primary risk

Estimate delivery is usually confirmed, but decision tracking is weak

Best next move

Capture expected decision date when the estimate is delivered.

Evidence reviewed

Estimate records; send/delivery confirmation; decision date; next action; follow-up history.

What this report does

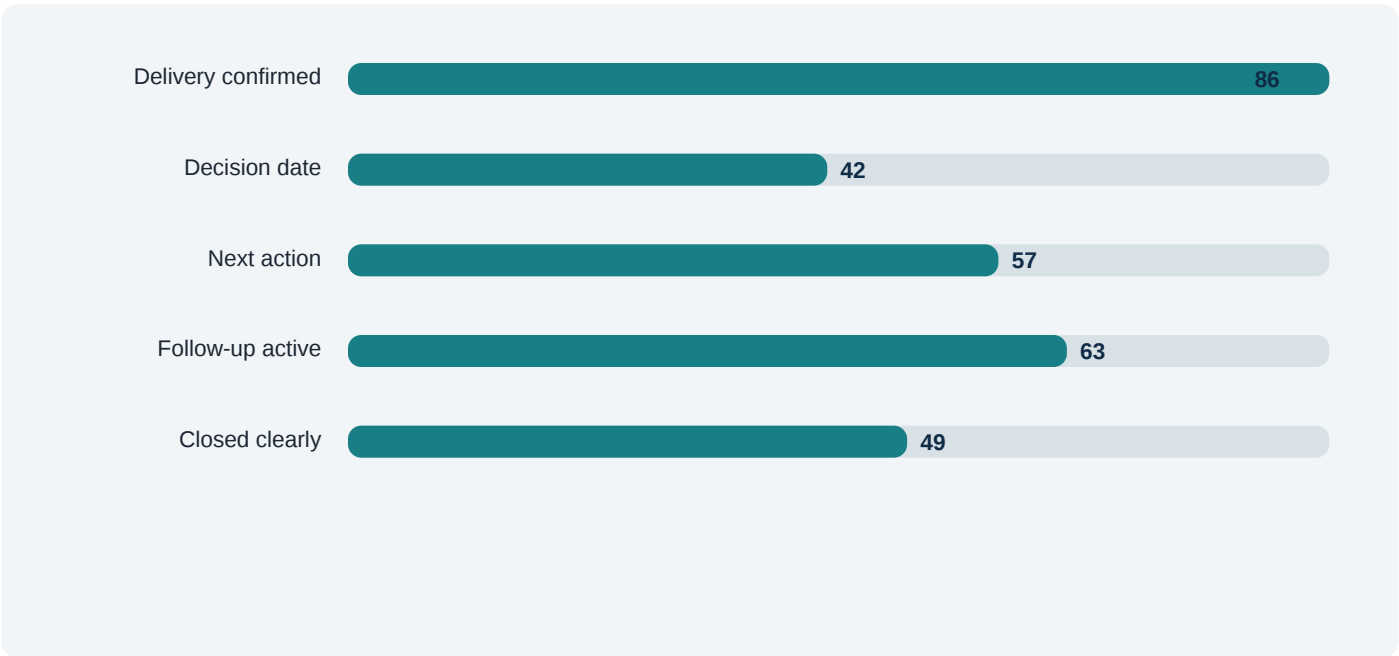
Converts the supplied evidence into prioritized operational actions without inventing ROI or revenue-loss claims.

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

Most records show the proposal was sent; fewer than half have a decision date. Opportunity ownership exists but timing becomes vague. Several old estimates remain open despite known outcomes.

PRIORITY FINDINGS

What deserves attention first

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

HIGH Estimate delivery is usually confirmed, but decision tracking is weak

Most records show the proposal was sent; fewer than half have a decision date.

HIGH Next actions disappear after the first follow-up

Opportunity ownership exists but timing becomes vague.

MEDIUM Closed clearly is underused

Several old estimates remain open despite known outcomes.

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	Capture expected decision date when the estimate is delivered.	Owner / manager
8-21 days	Require the next action before ending every follow-up interaction.	Process owner
22-30 days	Close or move stalled estimates based on explicit age and status rules.	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.