COMBINED REVIEW

High-Value Opportunity Protection Review

Fixed price: $149 **Format: 6-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. Check whether high-value opportunities are identified, redundantly owned, escalated, and visible.

Primary risk

High-value opportunities are identified but not redundantly protected

Best next move

Require primary and backup ownership for every high-value opportunity.

Evidence reviewed

High-value threshold; current high-value pipeline; owner/escalation rules; next actions.

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

Less than half have a backup owner. Several large opportunities are not included in a separate exception view. Three large opportunities had no dated next action.

PRIORITY FINDINGS

What deserves attention first

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

HIGH **High-value opportunities are identified but not redundantly protected**

Less than half have a backup owner.

HIGH **Manager visibility is incomplete**

Several large opportunities are not included in a separate exception view.

MEDIUM **Next-action discipline is better than average but still not universal**

Three large opportunities had no 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	Require primary and backup ownership for every high-value opportunity.	Owner / manager
8-21 days	Create a manager-only high-value exception queue.	Process owner
22-30 days	Escalate any high-value opportunity with no activity or next action past a defined threshold.	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.