MANAGEMENT & CONTROL

Manager Pipeline Review System

Fixed price: $149 **Format: 6-page sample written report** **Delivery: asynchronous**

FICTIONAL SAMPLE - NOT A REAL CLIENT

Executive snapshot

Harborview Restoration, a fictional property restoration contractor, is used to demonstrate how this service is delivered. Design a lightweight manager review system centered on exceptions, next actions, aging, and accountability.

Primary risk

Managers review totals instead of exceptions

Best next move

Build a weekly exception queue instead of reviewing every opportunity.

Evidence reviewed

Pipeline report; field definitions; ownership; meeting rhythm; exception rules.

What this report does

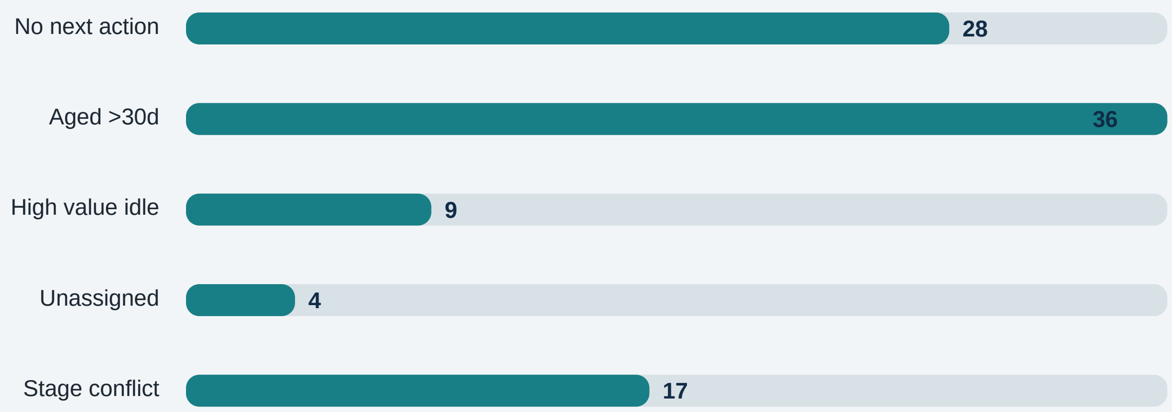
Converts the supplied evidence into prioritized operational actions without inventing ROI or revenue-loss claims.

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

The current meeting spends time on every deal rather than the few records needing intervention. These two categories account for most management attention needed. They are mixed into the standard pipeline and can be missed.

PRIORITY FINDINGS

What deserves attention first

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

HIGH **Managers review totals instead of exceptions**

The current meeting spends time on every deal rather than the few records needing intervention.

HIGH **Next-action and aging exceptions are the largest controllable risks**

These two categories account for most management attention needed.

MEDIUM **High-value deals lack a distinct review lane**

They are mixed into the standard pipeline and can be missed.

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	Build a weekly exception queue instead of reviewing every opportunity.	Owner / manager
8-21 days	Review owner, next action, age, and high-value flags as the mandatory fields.	Process owner
22-30 days	End each review with named owners and dated corrections.	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.