Sample delivery plan · illustrative

What you're paying for, laid out slide by slide.

A sample engagement for an 8-person services business. Real format and real scope — sample company and figures — so you can see exactly what lands on your desk, and when, before you sign.

SAMPLE CLIENT	TEAM SIZE	ENGAGEMENT	TIME TO DELIVERY
Summit Field Services	**8 people**	**Growth · $5,000**	**≤ 10 business days**

THE ENGAGEMENT IN ONE VIEW

From signed contract to a ranked roadmap in ten business days.

DAY 0

Confirm & pay via secure link

Scope locked, calendar holds sent the same day.

DAY 1

1:1 founder deep-dive call

Goals, constraints, and where it hurts most.

DAYS 2–6

Team interviews — 30–45 min each

Confidential. The people doing the work speak freely.

DAYS 5–8

System & data mapping

Your whole stack, traced end to end.

≤ DAY 10

Delivery session + handover

Walk-through of the business map and next steps.

WHAT LANDS ON YOUR DESK

Your business map & blueprint

- ✓ A complete map of how the business actually runs
- ✓ Every fix ranked by impact vs. effort
- ✓ A phased 6–12 month execution roadmap
- ✓ Modelled time & cost recovery per fix
- ✓ Delivered as PowerPoint *or* PDF — your choice

You also get a recorded walk-through so the whole team stays aligned after the session.

NO SURPRISES

What's included — and what isn't.

Included in this fee

- ✓ Founder + leadership + frontline interviews
- ✓ Full system & data-flow mapping across your stack
- ✓ Engineered blueprint with every fix ranked
- ✓ Modelled ROI per opportunity
- ✓ Live delivery session + recording
- ✓ 30 days of email follow-up for questions

Not included (scoped separately)

- — Building or implementing the systems
- — Software licences & third-party tool fees
- — Ongoing managed support or retainers
- — Custom development beyond the blueprint
- — Data migration & cleanup work

Anything here can be added as a done-for-you phase after the audit — see "After the audit."

HOW THE WORK IS DONE

Three phases. Each one leaves you something concrete.

Discovery & interviews

A

Founder, leadership, and the people doing the actual work — I trace exactly where your hours and revenue leak.

YOU GET

A findings memo: the real bottlenecks, in your team's own words.

Deep-dive system mapping

B

Under the hood of the whole stack — CRM, accounting, field tools, spreadsheets — finding where data gets stuck and manual errors cost money.

YOU GET

A visual map of every system and where the data breaks.

Engineered blueprint

C

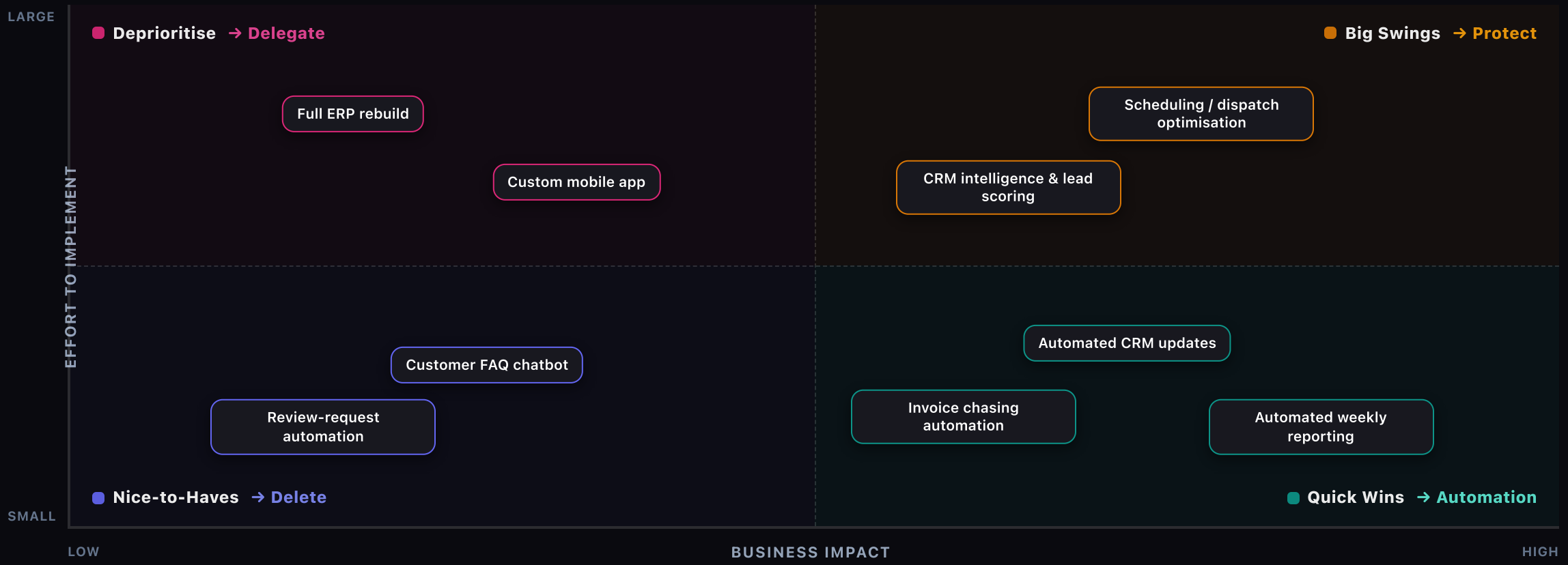
Data-engineering logic applied to your workflows: an execution roadmap with every fix ranked by impact vs. effort, phased over 6–12 months.

YOU GET

The ranked roadmap — your plan of record.

YOUR DELIVERABLE · SAMPLE OUTPUT

Every fix, mapped on impact vs. effort.



Quick Wins → Automation · Big Swings → Protect · Nice-to-Haves → Delete · Deprioritise → Delegate

Start bottom-right with Automation; reinvest the hours into your Protect moves. **~$170K/yr** recoverable (modelled).

YOUR TWO WEEKS

Low lift on your side. Four short commitments, total.

1

Deep-dive call
45 min with you, the founder.

7

Team interviews
30–45 min each, scheduled around them.

0

Reports to write
I pull what I need; you don't prep decks.

1

Delivery session
60 min walk-through, recorded.

The deal: you give me honest access and roughly **2.5 hours of your own time** across two weeks. I give you a complete, ranked plan for the business — delivered in the format your team will actually use.

CURRENT VS. FUTURE STATE · SAMPLE

Same work. A fraction of the hours.

ADMIN & DATA ENTRY — TODAY VS. WITH AI

CURRENTLY	WITH AI
Finish job, scribble notes	Tech dictates one voice note
Re-key into the CRM	AI drafts summary, updates CRM & invoice
Raise invoice by hand	Office reviews & sends
Chase follow-ups manually	

480h Monthly time, today → **144h** Monthly time, with AI

336h saved / month

CURRENT PROCESS

Field techs	6
Admin time / week / tech	~~5h~~ → **1.5h**
Monthly process time	~~480h~~ → **144h**

FUTURE EXPECTED IMPACT

336h	2.0	$158K
Time saved / month	FTE equivalent saved	Yearly labour saved

Process transformation — illustrative

QUICK WIN SPOTLIGHT · SAMPLE

Example: automated job close-out & CRM updates.

CURRENTLY

- Techs lose ~5 hrs/week each to paperwork and CRM entry
- Details get keyed in late, or not at all
- Missed follow-ups quietly cost repeat work
- Invoices lag days behind the job

WITH AI IN PLACE

- ✓ Tech dictates a 30-second voice note from the van
- ✓ AI writes the job summary and updates the CRM
- ✓ Draft invoice and follow-up queued automatically
- ✓ Office just reviews and clicks send

THE IMPACT

~40%
less admin time per tech

3h
weekly, down from 5

$36K
/yr labour recovered

One of the Automation opportunities from the ranked map. Figures modelled for a 6-tech team — your audit sizes each win to your actual numbers.

THE ANNUAL IMPACT · SAMPLE MODEL

Every recommended fix, costed and ROI-ranked.

AI SOLUTION	MONTHLY HOURS SAVED	AVG FTE RATE (USD)	FTES SAVED	ANNUAL FTE COSTS SAVED	ADDED ANNUAL OPPORTUNITY	EST. IMPL. COST	YEAR 1 ROI
Automated CRM updates	72	$42.00	0.4	$36,288	$38,000	$9,000	403%
Invoice chasing automation	52	$34.00	0.3	$21,216	$22,000	$6,000	354%
Scheduling / dispatch optimisation	100	$45.00	0.6	$54,000	$70,000	$18,000	300%
Automated weekly reporting	48	$40.00	0.3	$23,040	Not applicable	$6,000	384%
Customer FAQ chatbot	64	$30.00	0.4	$23,040	$15,000	$7,500	307%
Grand total	**336**	**$39.08**	**2.0**	**$157,584**	**$145,000**	**$46,500**	**339%**

Illustrative / modelled for the sample 8-person business — not client results. Year 1 ROI = annual FTE costs saved ÷ estimated implementation cost. Opportunity benefits (recovered revenue, extra capacity) are shown separately and excluded from the ROI figure to keep it conservative.

ONE FLAT FEE · FRAMEWORK INCLUDED

Priced by team size. No hourly billing, no surprises.

Starter
1–3 people

$2,000

Full audit & ranked roadmap

SUMMIT'S FIT

Growth
3–10 people

$5,000

Full audit, team interviews, delivery session

Scale
Larger teams

$10,000+

Starting — scales with size & complexity

Every tier includes the same framework: discovery interviews, full system mapping, the ranked opportunity map, modelled ROI, a live delivery session, and 30 days of follow-up. The fee scales only with the number of people I interview and systems I map.

YOU'RE NEVER LEFT STRANDED

Three ways forward after the roadmap lands.

Run it yourself

Take the roadmap and implement it in-house with your team. It's yours to keep.

Advisory support

Bring me in to guide prioritisation and keep you on track as you build.

Done for you

My team builds the systems end-to-end, straight off the blueprint.

WHAT "DONE FOR YOU" CAN INCLUDE

Company Memory Bank

One place that remembers how the business runs.

Live dashboards

One screen for the numbers that matter.

AI agents

Assistants for the repetitive work.

Workflow automation

Your tools finally talk to each other.

Done-for-you work is scoped and priced separately per engagement. The audit fee stands alone — there's no obligation to continue.

WHAT YOU ACTUALLY WALK AWAY WITH

A clear map of what to fix, what to stop, and where the money is.

- ✓ A complete picture of how your business actually runs
- ✓ Every opportunity ranked by impact vs. effort
- ✓ A phased 6–12 month plan you can act on day one
- ✓ Modelled time and cost recovery, fix by fix
- ✓ The recording, so the whole team stays aligned

NEXT STEP

Take the free assessment, then book a 15-minute call.

We review your results together, confirm the fit, and lock your start date. Signed to delivered in ten business days.

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