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SAMPLE DELIVERABLE

The Operating System Audit

What a founder receives at the end of three weeks

Prepared as an illustration for prospective clients

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About This Sample

This document shows the shape and depth of an Operating System Audit report. The company described here, a founder led creative services agency, is fictional. Every name, figure, vendor, and finding in this sample is invented for illustration. Client engagements are confidential, and no client material appears in this document.

A real audit runs three weeks on a fixed scope and a fixed price. It produces a report like this one plus a set of working documents that stay with the business: an operating cadence, a responsibility map, a decision log, trackers, and a 30/60/90 roadmap. The excerpts in this sample show what those documents look like.

> *Sample content begins on the next page. Read it as a template: your business, your numbers, and your findings would take its place.*

SAMPLE REPORT

Executive Summary

You hired this audit to answer a question you had been carrying alone: why does everything still run through the founder?

At intake we agreed on a three week scope: map every recurring financial obligation and name an owner for each, inventory the software and vendor spend ahead of two renewals, design a weekly operating rhythm that moves approvals off the founder's plate, stand up a content calendar so publishing stops depending on spare time, and build the hiring question sets for the open producer role. Five questions were open on day one:

- Which retainers are profitable once unbilled revisions are counted, and which are not?
- What are we actually paying for in software each month, and what do we do about the two renewals due next quarter?
- Why do projects stall at the founder review step, and what would it take to delegate approval?
- What should the agency publish, where, and on what schedule, without the founder writing everything?
- What does a sustainable week look like for the founder, and can the studio run through a two week absence?

The headline after three weeks: the business is healthier than the founder feared and less protected than it should be. Revenue is steady, client retention is strong, and the team is capable. The exposure sits in a missing layer: no one is paid to watch the whole system, connect the pieces, and act before issues become expensive. The bookkeeper records transactions, the accountant files what she is given, and the project management tool tracks what it is told to track. The space between those jobs is where the problems collected.

In three weeks the audit did three things. It documented the gaps on the record through structured sessions with the team and the vendors. It built the replacement structure: a weekly operating cadence, a financial responsibility map with an owner for every obligation, a content calendar with a publishing rhythm, and question sets for the producer hire. And it returned decisions to motion: fourteen decisions that had been open for weeks or months were closed, including both software renewals, the retainer pricing update, and the review and approval workflow.

The Business As We Found It

One founder and ten staff running two service lines: retainer clients on monthly scopes and project clients on fixed bids. The founder holds final review on all creative work, owns the sales pipeline, and writes most of the agency's own marketing. The studio director runs day to day production. A part time bookkeeper closes the books monthly and an outside accountant files returns from the books as given.

Processes live in the founder's head. Client history, pricing logic, and vendor relationships are carried mentally rather than documented. The team is strong at delivery and blocked at decision points, because decisions wait for the founder and the founder's calendar is full.

Findings, Part 1: Decision Velocity

What we found

Decisions had no set place or time to be made. The project tool renewal, the retainer price update, the producer hire, and the review workflow had been open for weeks to months. None of them lacked an answer; they lacked a container. Deferred decisions compounded: an unset price blocked two proposals, an unfilled producer seat kept the founder in review, and full review queues delayed delivery.

What changed during the audit

- **Software:** both renewals decided from usage data: one tool renewed at a negotiated lower tier, one cancelled with its three active workflows migrated.
- **Pricing:** retainer rates updated with a dated notice to existing clients and a grandfathering window.
- **Approvals:** a two step review replaced founder review of everything: the studio director approves standard work, the founder reviews new client work and flagged items only.
- **The producer hire:** scorecard written, question set built, and first interviews scheduled.

The change came from structure and organization. A weekly decision meeting now exists, each decision arrives with its facts already gathered, and each close gets recorded in the decision log.

Sample: decision log excerpt

Date	Decision	Outcome	Owner
Week 1	Renew or replace the project management tool	Renewed at lower tier; annual saving negotiated	Studio director

Date	Decision	Outcome	Owner
Week 2	Retainer price update	New rate set; notice sent with 60 day window	Founder
Week 2	Review and approval workflow	Two step review adopted; founder reviews exceptions	Founder
Week 3	Producer role scope	Scorecard approved; interviews scheduled	Studio director

Findings, Part 2: Financial Clarity

What we found

- **Unbilled scope.** Roughly one revision round per retainer per month falls outside scope and goes uninvoiced. No one owns the decision to bill it, so no one does.
- **Subscription sprawl.** Nineteen software subscriptions, four with no active user in the last 90 days. Two auto renew next quarter with no owner assigned to evaluate them.
- **The empty advisory seat.** The bookkeeper records, the accountant files, and no one advises. Questions about entity structure, estimated taxes, and margin by service line have no assigned seat.
- **Fragile oversight.** Reports get generated and not read, because no meeting exists where anyone would read them.

What changed during the audit

- The Financial Responsibility Map now exists: eleven recurring obligations, each with an owner, a cadence, and an escalation path, or explicitly marked unowned.
- A scope change protocol was written: out of scope requests get logged, priced, and either billed or consciously waived in writing.
- The subscription inventory was built and both renewal decisions were made from it.
- Question sets were built for the advisory conversation with the accountant, and the first session was run against them.

Sample: financial responsibility map excerpt

Obligation	Owner today	Proposed owner	Cadence and check
Monthly close and reconciliation	Bookkeeper	Bookkeeper	Monthly; founder reviews flag list
Estimated tax payments	Unowned	Accountant	Quarterly; calendar

Obligation	Owner today	Proposed owner	Cadence and check
			reminder set
Software renewals	Unowned	Studio director	Inventory reviewed quarterly
Scope change billing	Unowned	Studio director	Logged weekly; billed or waived in writing
Payroll and contractor payments	Founder	Bookkeeper	Twice monthly; founder approves

Findings, Part 3: Organizational Cadence

What we found

The cadence has been ad hoc, driven by whatever the business needed that day. Meetings happen when something breaks. The agency's own marketing publishes when the founder has a free evening, which means it mostly does not publish. Tasks are carried mentally, and systems get built and then abandoned because nothing attaches them to a calendar or a trigger.

What changed during the audit

- A weekly operating rhythm now runs: Monday decisions, Wednesday working session, Friday ship and review opening with wins.
- A shared capture document holds the running list with a top three rule, replacing management by memory.
- The content calendar exists with owners, a publishing schedule, and a monthly planning slot, so marketing runs on cadence rather than on the founder's spare time.
- A wins record opens every Friday review. Three weeks in, it is already the counter evidence to the feeling of not doing enough.

Sample: weekly operating cadence

Day	Meeting	Purpose	Length
Monday	Decisions	Close open decisions, each teed up with its facts	45 min
Wednesday	Working session	Build together: proposals, systems, campaigns	90 min
Friday	Ship and review	What went out, wins, next week's top three	45 min

Sample: content calendar excerpt

Week	Channel	Topic	Owner and status
Week 1	Newsletter	Case study: retainer redesign for a returning client	Designer; drafted
Week 1	LinkedIn	Founder post: what changed when approvals moved	Founder; scheduled
Week 2	Blog	How we scope revision rounds	Studio director; outlined
Week 2	LinkedIn	Team post: behind the scenes of the new cadence	Designer; planned
Week 3	Newsletter	Quarterly roundup and one client win	Founder; planned

What This Audit Built

Deliverables in the client's hands at close, all living documents:

- The weekly operating cadence with daily notes and next morning recaps
- The Financial Responsibility Map: every recurring obligation with an owner, a cadence, and an escalation path
- The decision log, with every decision closed during the engagement on the record
- The content calendar with owners and a publishing rhythm
- The subscription and vendor inventory, with renewal dates and evaluation owners
- Question sets for key hires and vendor conversations, interview ready
- The shared capture document and top three system
- The wins record
- Session recaps throughout, plus this report and the 30/60/90 roadmap

The 30 / 60 / 90 Roadmap

Next 30 days

- Run the cadence without exception. The three meetings are the system; protect them.
- Producer hire decided. The scorecard and question set are built; interviews close this month.
- First month of the scope change protocol: every out of scope request logged and either billed or waived in writing.

Days 30 to 60

- First monthly close reviewed in a standing twenty minute owner oversight slot: scan transactions, check the flag list, read the report that now has a reader.
- Content calendar through its first full cycle; adjust the schedule from what actually shipped.
- Advisory conversation with the accountant completed against the question set; margin by service line answered.

Days 60 to 90

- The two week absence test: the founder steps away and the studio runs on cadence rather than presence. This is the test the whole system was built to pass.
- First quarterly review: subscription inventory rechecked, pricing update results measured, roadmap refreshed.

What Your Audit Would Look Like

The company in this sample is invented. The method is not. Every audit runs the same way: a fixed three week scope set at intake, structured sessions on your calendar, findings documented on the record, working systems built during the engagement rather than recommended for later, and a report like this one that names what was found, what changed, and who owns what next.

The Operating System Audit is a fixed scope, fixed price deep dive into how your business actually runs. We map your operations, cadence, systems, and team, then surface where ownership is missing and what the gaps are costing you. At the end of three weeks, you finish with a prioritized roadmap you can act on with or without me.

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