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SAMPLE ASSESSMENT READOUT — ILLUSTRATIVE EXAMPLE

This is what you'd actually receive.

Before you send an assessment link to your team, you should see the deliverable. This document walks through a readout the way your leadership team would receive it — the headline numbers, the blind spots, the evidence, and what to do first.

READ THIS FIRST

Everything in this document is a composite, illustrative example — the company, the numbers, and the quotes are representative of the kinds of findings these assessments surface, not a specific client engagement. Your readout is built entirely from your team's answers, and if there's no material leak, it says so.

Subject of this example: a mid-market commercial contractor — roughly $40M revenue, ~120 people, project-heavy operations.

WHAT'S INSIDE

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SAMPLE READOUT · 1 OF 4

Executive snapshot

One week after the link went out: 14 of 16 invited people responded across four role groups. Here's what leadership sees first.

MONEY LEAKAGE FOUND	TIME LEAKAGE FOUND	RESPONSE COVERAGE	OVERALL CONFIDENCE
~ $100,000 / yr	~ 135 hrs / mo	14 people · 4 roles	Medium-high

TOP LEAK THEMES — EVERY ONE GROUNDED IN YOUR TEAM'S ANSWERS

Unbilled change orders leak six figures a year — MONEY · CONSENSUS 3/5 · MEDIUM CONFIDENCE · BLIND SPOT — ~ $100,000 / yr

Change orders and owner-approved extras slip through the billing process — work performed but never invoiced.

Job-cost visibility runs three weeks behind — CONTROL · CONSENSUS 3/5 · MEDIUM CONFIDENCE · BLIND SPOT — margin blind ~3 wks/mo

Leadership sees true margin only after manual close catches up. Overruns surface too late to correct.

Every job cost is entered twice, by hand — TIME · CONSENSUS 4/5 · HIGH CONFIDENCE — ~ 55 hrs / mo

Costs are keyed into the project system, then re-keyed into accounting. Two systems, no bridge.

PM paperwork displaces project leadership — CAPACITY · CONSENSUS 3/5 · MEDIUM CONFIDENCE — ~ 80 hrs / mo

Half of every PM's week goes to change orders, submittals, and status reports instead of running the job.

Bid leveling is a manual time sink — TIME · CONSENSUS 1/5 · LOW CONFIDENCE — directional — needs more signal

Raised by one role group only. Reported honestly as low-consensus; worth a follow-up, not a headline.

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SAMPLE READOUT · 2 OF 4

Leadership blind spots

Going in, leadership named bid leveling as the pain. The team — independently, role by role — surfaced two bigger leaks nobody had put on the table.

BLIND SPOT

Unbilled change orders

~ $100,000 / yr in work performed but never invoiced

Project managers reported 2–3 change orders a month slipping past invoicing — small items to five-figure work. Finance independently flagged subcontractor invoices tied to change orders that were never logged, meaning the company absorbed costs that should have been passed to owners. Neither group knew the other was seeing the same leak.

Consensus 3/5 · reported by two role groups independently

BLIND SPOT

Margin blindness, three weeks a month

cost overruns surface weeks after the spend

Reconciled job costs lag the field by seven to ten days. Finance wants real-time margin but waits on a manual close; operations discovers overruns only when accounting catches up — too late to course-correct while the job is still active. Decisions are being made on stale numbers most of each month.

Consensus 3/5 · finance, operations, and PMs each described it

AND WHAT'S ALREADY STRONG — THE READOUT SAYS THAT TOO

In this example, customer support scored highest across the board (4/5 on use depth): response templates, a shared inbox with clear ownership, and no duplicated effort. The readout names strengths as plainly as leaks — so effort goes where the leaks are, not where the noise is. And when there's no material leak at all, the honest answer is a short readout and no pitch.

HOW A BLIND SPOT GETS FLAGGED

1 · SPONSOR PREDICTS
Leadership logs what they expect to find before the link goes out.

→ 2 · TEAM ANSWERS INDEPENDENTLY
Anonymous and role-tagged — no one sees anyone else's answers.

→ 3 · DIVERGENCE GETS FLAGGED
Strong cross-role signal leadership didn't predict = blind spot.

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SAMPLE READOUT · 3 OF 4

The evidence, and the heatmap

No black box: every finding links to the anonymous, role-tagged answers behind it, and every part of the business gets scored on the same six questions.

BEHIND ONE FINDING — UNBILLED CHANGE ORDERS

PROJECT MANAGER — 2–3 UNBILLED PER MONTH

"More than we'd like. Maybe 2 or 3 a month slip through unbilled. They range from a few hundred dollars to five figures on a big one."

FINANCE — $12,000 UNBILLED COST

"Last month we paid a sub for work tied to a change order nobody logged — we ate the cost because it never got billed to the owner."

Answers are anonymous and role-tagged. A finding only becomes a headline when multiple roles point at the same leak — one person's opinion stays labeled exactly that.

THE HEATMAP — EVERY FUNCTION, SIX QUESTIONS

	USE	DATA	FLOW	DELEGATE	TEAM	RISK
Sales	3	2	2	1	3	1
Operations	2	3	2	2	2	2
Support	4	3	3	3	2	2
Finance	1	2	1	1	1	3
Delivery	3	4	3	2	3	2

Scored 1–5 from the team's answers. Orange = bottleneck worth attention. Green = already mature. In this example: finance is the constraint, support is the strength.

WHERE THE ANSWERS COME FROM

- ✓ 10 minutes per person — they talk or type, no scheduling.
- ✓ Anonymous, reported by role group only. Never by name.
- ✓ Follow-ups push for numbers, not vibes, wherever possible.
- ✓ In this example: 14 of 16 invited people responded.

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SAMPLE READOUT · 4 OF 4

Direction — and where it goes from here

The readout ends with one honest recommendation, sorted by what the evidence supports. Not a tool list — an order of operations.

FIX FIRST

- Change-order capture: one flow from field approval to invoice — plug the $100K leak before any AI.
- A weekly job-cost snapshot while the real fix is built — stop deciding on stale margin.

BUILD NEXT

- Single-entry job costing: enter once, land in both systems — recover ~55 hrs/mo.
- Live margin visibility for leadership — overruns surface while the job can still be corrected.

SKIP FOR NOW

- Generic AI tools and chat assistants — nothing here needs one yet.
- Anything touching estimating — one role group's signal isn't enough evidence to fund it.

WHERE IT GOES FROM HERE — ALWAYS YOUR CALL, AT YOUR PACE

ASSESSMENT
This readout. TBI framed — free for 10 selected companies.

→ **AUDIT + PLAYBOOK**
The ROI defined, with evidence, and the build sequence.

→ **BUILD**
A la carte systems or the full playbook as a partnership.

Want your numbers instead of an example?

Reply for one of the 10 complimentary Assessment slots — normally $5,000. One link to your team, ten minutes per person, and a readout like this built from your business in about a week.