

THE SIGNATURE SAMPLE / 2026

A WHOLE-BUSINESS ADVISORY WORK PRODUCT



ALPHA VISION METHOD

THE BUSINESS *INSIDE-OUT*

Beyond symptoms. Toward informed decisions.

A premium illustrative advisory report: whole-business analysis, evidence, decision rights, operating economics, priority setting and a practical implementation roadmap.

INSIDE THE WORK

Eight business lenses / Connected workflows / Leadership decisions
90-day priorities / Accountability / Verification

A NOTE TO THE OWNER

The business behind the business.

For the owner who has built something real - and wants the next decisions to be better informed.

YOU CAN BE GOOD AT RUNNING A BUSINESS

and still be too close to see how all of its parts are affecting one another.

The goal is not more advice. It is better questions, clearer evidence and a practical sequence of decisions.

WHAT SERIOUS ADVISORY WORK SHOULD CHANGE

- 01 **From isolated symptoms**
to a connected view of the business.
- 02 **From confident guesses**
to observations you can trace and challenge.
- 03 **From endless priorities**
to a small number of decisions with accountable owners.
- 04 **From hopeful implementation**
to an agreed way to check what actually changed.

This entire report is a fictional demonstration. It is not a diagnosis of any real company.

HOW TO READ THIS DOCUMENT

An atlas for better decisions.

Navigate the example as a working system, not a collection of disconnected recommendations.

*01***Context & diagnosis****04-09**

The business context, owner concerns and evidence approach.

*02***Workflow & accountability****10-14**

Current and proposed processes, roles and decision boundaries.

*03***Commercial & financial visibility****15-18**

Customer flow, operating rhythm and scenario economics.

*04***Priorities & implementation****19-22**

Root-cause questions, priorities, and the 90-day decision path.

*05***Verification & handoff****23-27**

Measures, risk controls, templates and commercial clarity.

HOW TO INTERPRET CLAIMS

SCENARIO = fictional input; HYPOTHESIS = untested explanation; PROPOSED = suggested change; VERIFIED = supported by actual evidence. No real client results appear in this report.

CASE FILE / 01

Northline Home Services.

Fictional service business created only to demonstrate ALPHA VISION analytical methods.

ILLUSTRATIVE COMPANY CARD

PLUMBING + HVAC

OWNER

Founder-led, assumed

OPERATING MODEL

Office + field team

CUSTOMERS

Residential + selected commercial

FICTIONAL OWNER STATEMENTS

"My team is busy, but too many decisions still come through me."

"We may be losing track of follow-up, but I do not know where."

"I want a clearer view of the business before I add more people or software."

CASE DISCIPLINE

The statements above are scenario assumptions. They do not establish poor performance, operational causes, staffing levels, revenue or any outcome.

EXECUTIVE BRIEF / SAMPLE

What we know. What we do not.

A strong executive summary separates the owner's concern from the evidence still needed.

REPORTED**Owner involvement feels high.**

The owner says routine issues repeatedly return for decisions.

HYPOTHESIS**Decision boundaries may be unclear.**

Could be role ambiguity, missing inputs, risk rules or another cause.

UNKNOWN**Financial and customer impact.**

No validated baseline is available in this fictional example.

DECISION MEMO / PROPOSED SEQUENCE

01 Establish a baseline

Sample recent inquiries and identify actual handoffs.

02 Agree on one decision boundary

Separate routine exceptions from owner-only decisions.

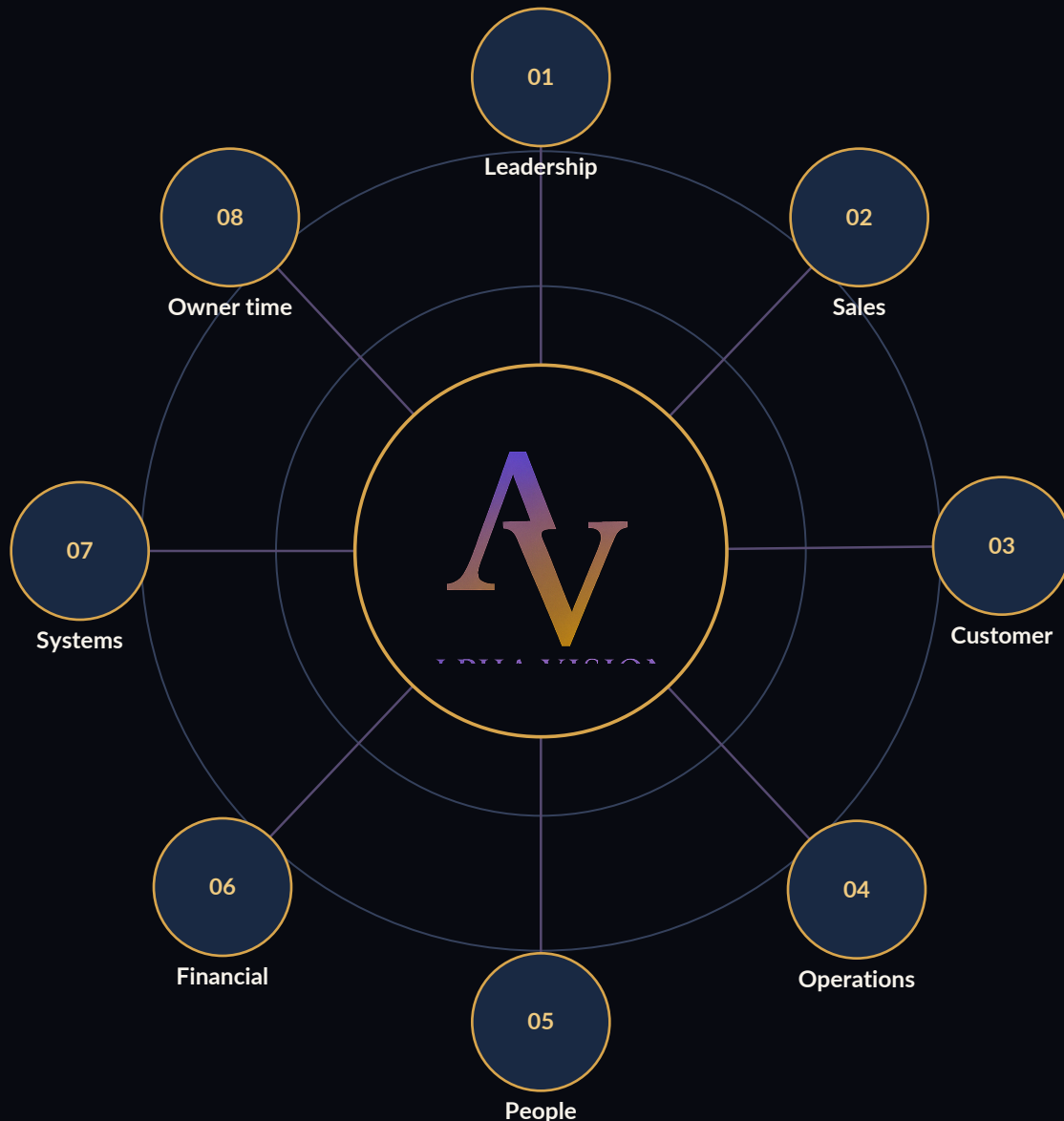
03 Pilot and check

Trial a limited change and inspect evidence before expanding.

THE WHOLE-BUSINESS VIEW

One company. Eight connected lenses.

A broad assessment is useful when it reveals relationships, not merely eight separate checklists.



A WHOLE-BUSINESS VIEW IS NOT EQUAL TIME IN EVERY DEPARTMENT.

Follow the strongest evidence to the highest-value decisions, and record areas that remain unknown.

DIAGNOSTIC ARCHITECTURE

Eight lenses. Better questions.

Each lens asks what evidence would help the owner decide; none presumes the answer.

01 Leadership

What is the current priority?

EVIDENCE: Decision log; planning cadence.

02 Sales

Where do inquiries go?

EVIDENCE: Inquiry register; follow-up records.

03 Customers

Where do expectations change?

EVIDENCE: Customer messages; service timeline.

04 Operations

Where do handoffs occur?

EVIDENCE: Schedule; job status transitions.

05 People

Who owns routine exceptions?

EVIDENCE: Role descriptions; interviews.

06 Financial

Which costs drive trade-offs?

EVIDENCE: Validated management reports.

07 Systems

Where is source-of-truth data?

EVIDENCE: Forms; CRM; job management.

08 Owner time

What requires owner approval?

EVIDENCE: Decision sample; owner diary.

EVIDENCE AND DISCIPLINE

A finding must earn its name.

This register demonstrates how to keep reports, hypotheses and verification needs separate.

CLASS	SCENARIO STATEMENT	WHAT IT MEANS	NEXT EVIDENCE
REPORTED	Owner reviews many routine decisions.	Owner perception; not a count.	Sample 2 weeks of decisions.
REPORTED	Follow-up is hard to see.	Visibility concern; not proven loss.	Trace inquiry-to-contact events.
HYPOTHESIS	No named backup exists.	Possible role design issue.	Interview office and field team.
UNKNOWN	Average response time.	No baseline yet.	Timestamp a defined inquiry sample.
UNKNOWN	Cost of rework.	Cannot claim cash savings.	Time study + labor assumptions.
PROPOSED	Create exception rules.	Not yet approved or tested.	Review with responsible manager.

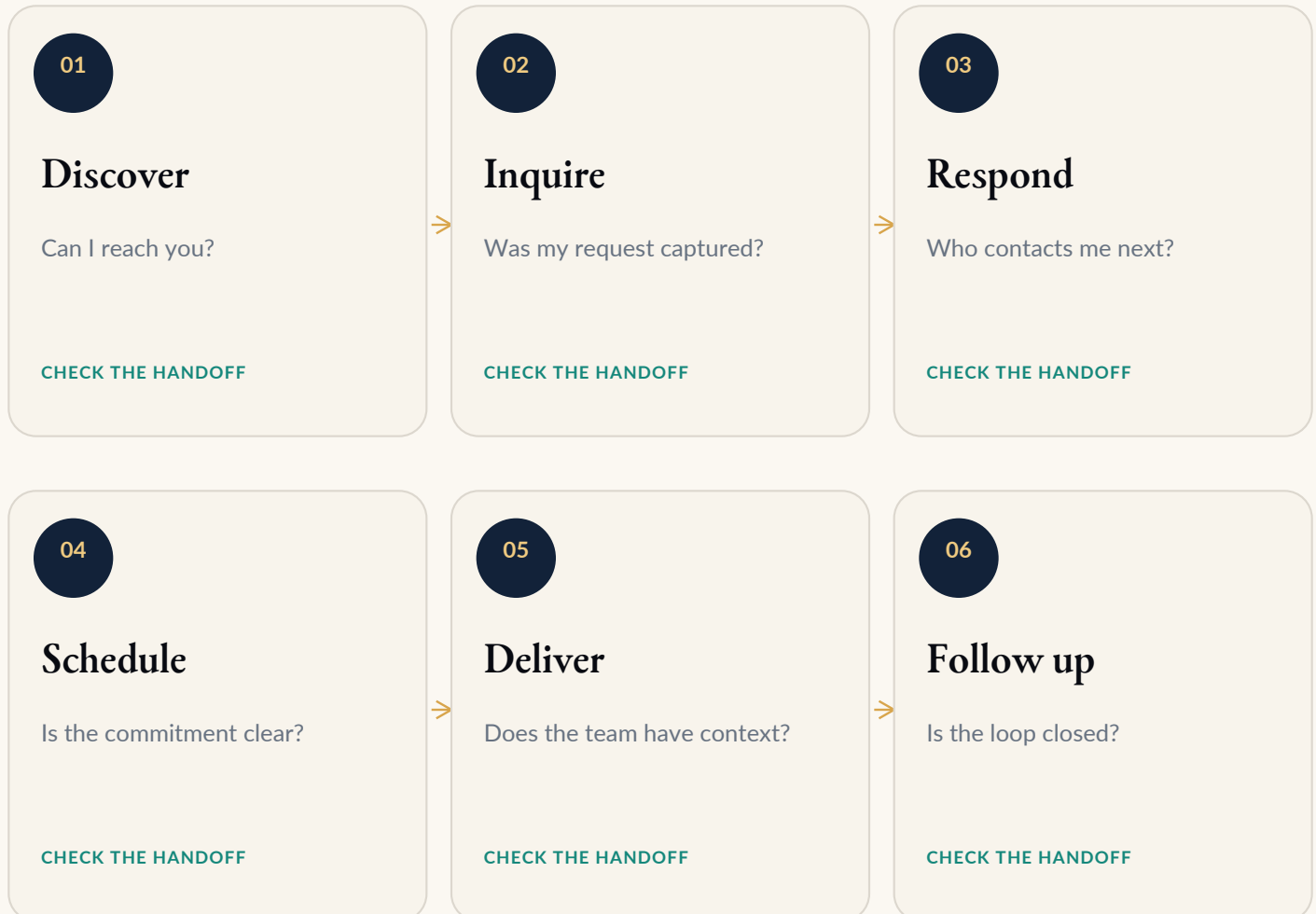
INTEGRITY RULE

Keep source statements and advisor interpretations in separate fields. A scenario example is not a finding about a real client.

THE CUSTOMER EXPERIENCE

Follow one request end to end.

Map what the customer expects and what the company must coordinate behind the scenes.



ONE CUSTOMER JOURNEY CAN CROSS MANY INTERNAL OWNERS.

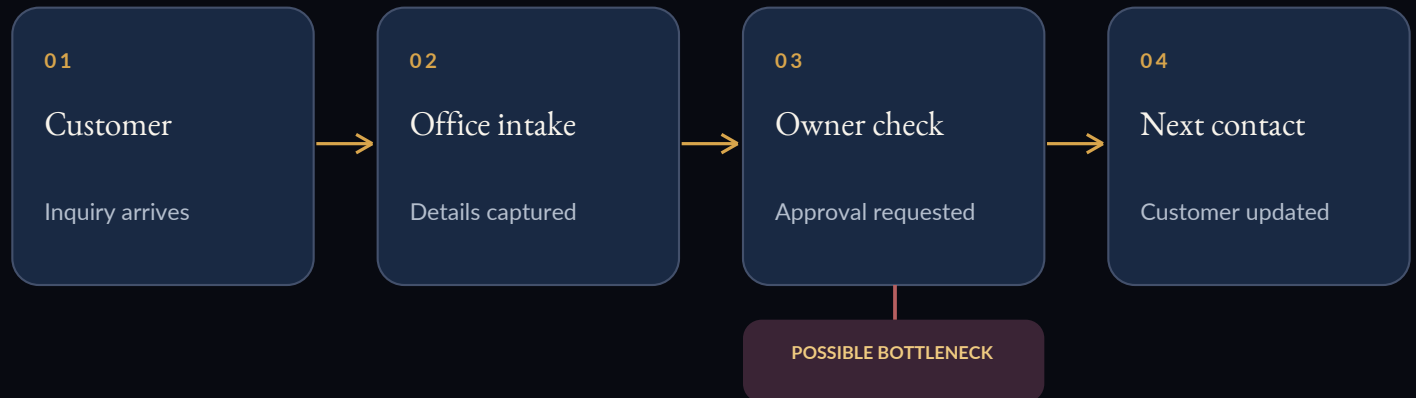
EVIDENCE TO REQUEST

A small, permitted sample of inquiries with timestamps, next-action owners and final status - anonymized where appropriate.

WORKFLOW / CURRENT-STATE CONCEPT

Where the handoff becomes invisible.

Current-state diagram below is hypothetical. It is intended to guide observation, not assert failure.



POSSIBLE FAILURE MODES TO INVESTIGATE

Owner-only queue

Routine decisions may wait for one person.

Missing next-action field

A captured inquiry may lack a visible owner.

No backup decision

Absences may leave responsibility ambiguous.

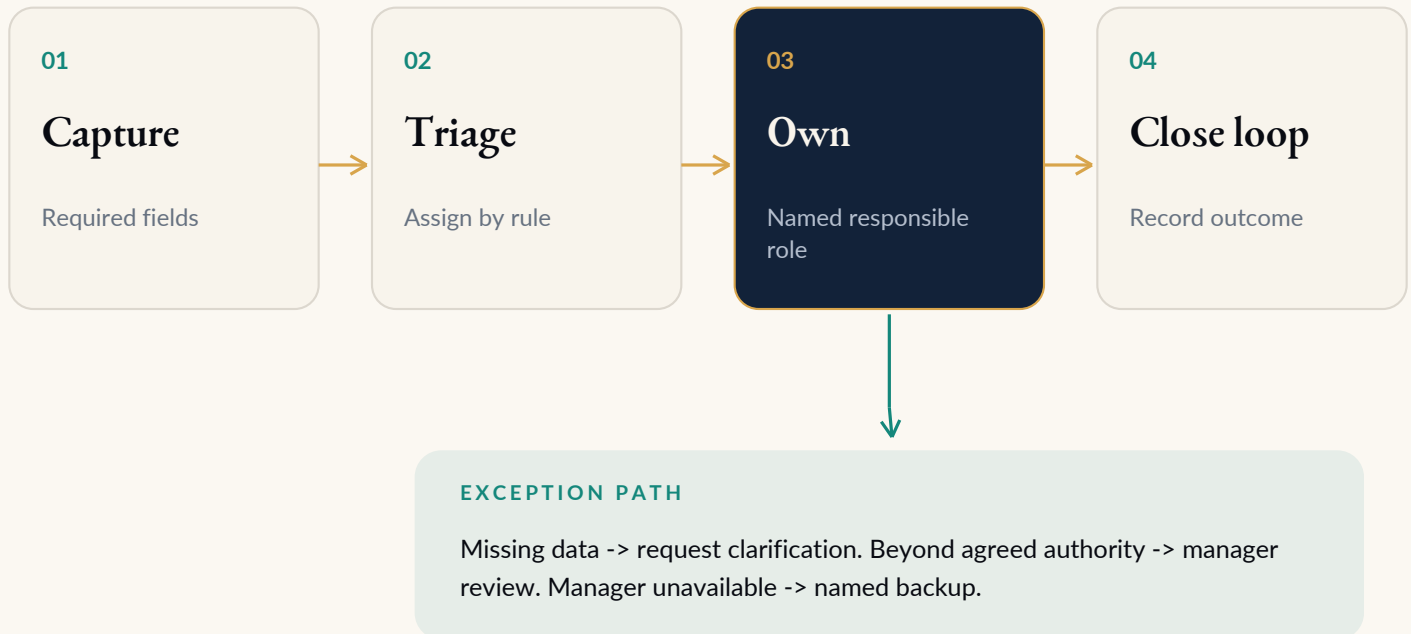
BEFORE REDESIGNING

Observe real examples and ask which handoff actually fails. Do not redesign a process based on a fictional diagram.

WORKFLOW / PROPOSED-STATE EXAMPLE

Make ownership explicit.

One possible procedure: define the next action, approved exceptions and the evidence of completion.



REQUIRED PROCEDURE FIELDS

TRIGGER

New inquiry arrives

OWNER

Office intake role

DECISION RULE

Assigned by approved criteria

BACKUP

Named alternate role

EVIDENCE

Next-contact timestamp

ESCALATION

Only defined exceptions

SCOPE DISCIPLINE

This is a proposed educational example. Client approval and actual testing would be required before calling it an implemented workflow.

ACCOUNTABILITY / RACI EXAMPLE

Who does what - and who decides?

R = responsible, A = accountable, C = consulted, I = informed. Roles are illustrative.

ACTIVITY	OWNER	OFFICE	SERVICE	FIELD
Capture inquiry	I	R/A		
Validate details	I	R/A	C	
Assign service response	I	R	A	C
Handle normal exception	I	R	A	
Approve out-of-policy terms	A	C	R	
Log customer update	I	R/A		
Review weekly exceptions	A	R	C	

HOW TO USE THIS MATRIX

Every important activity should have one clear accountable role. Multiple people can contribute, but avoid vague shared accountability for the final decision. Test the assignments against actual staffing and existing authority.

DECISION RIGHTS

Protect the owner from unnecessary escalation.

Set clear boundaries that preserve control without requiring approval for every routine action.

DECISION	PROPOSED AUTHORITY	ESCALATE WHEN	RECORD
Routine inquiry	Office coordinator	Required details absent	CRM owner + timestamp
Schedule adjustment	Service manager	Outside agreed windows	Schedule change log
Customer exception	Service manager	Cost / risk threshold met	Exception category
Policy change	Business owner	Always owner-approved	Version + approval
Unusual price terms	Business owner	Outside written policy	Approval reference
Recurring issue	Manager to owner	Pattern exceeds threshold	Weekly review note

CRITICAL CONTROL

Actual thresholds, authorities and exceptions must be approved by the real business owner and consistent with legal and operating requirements.

HUMAN EVIDENCE

Ask the people doing the work.

A useful diagnosis captures different perspectives without choosing a villain or assuming blame.

01

OWNER

Which decisions truly need you? Which repeat every week?

02

OFFICE

What information is usually missing at the first handoff?

03

FIELD TEAM

When a job changes, what information arrives too late?

04

CUSTOMER

After making contact, what would a clear next step feel like?

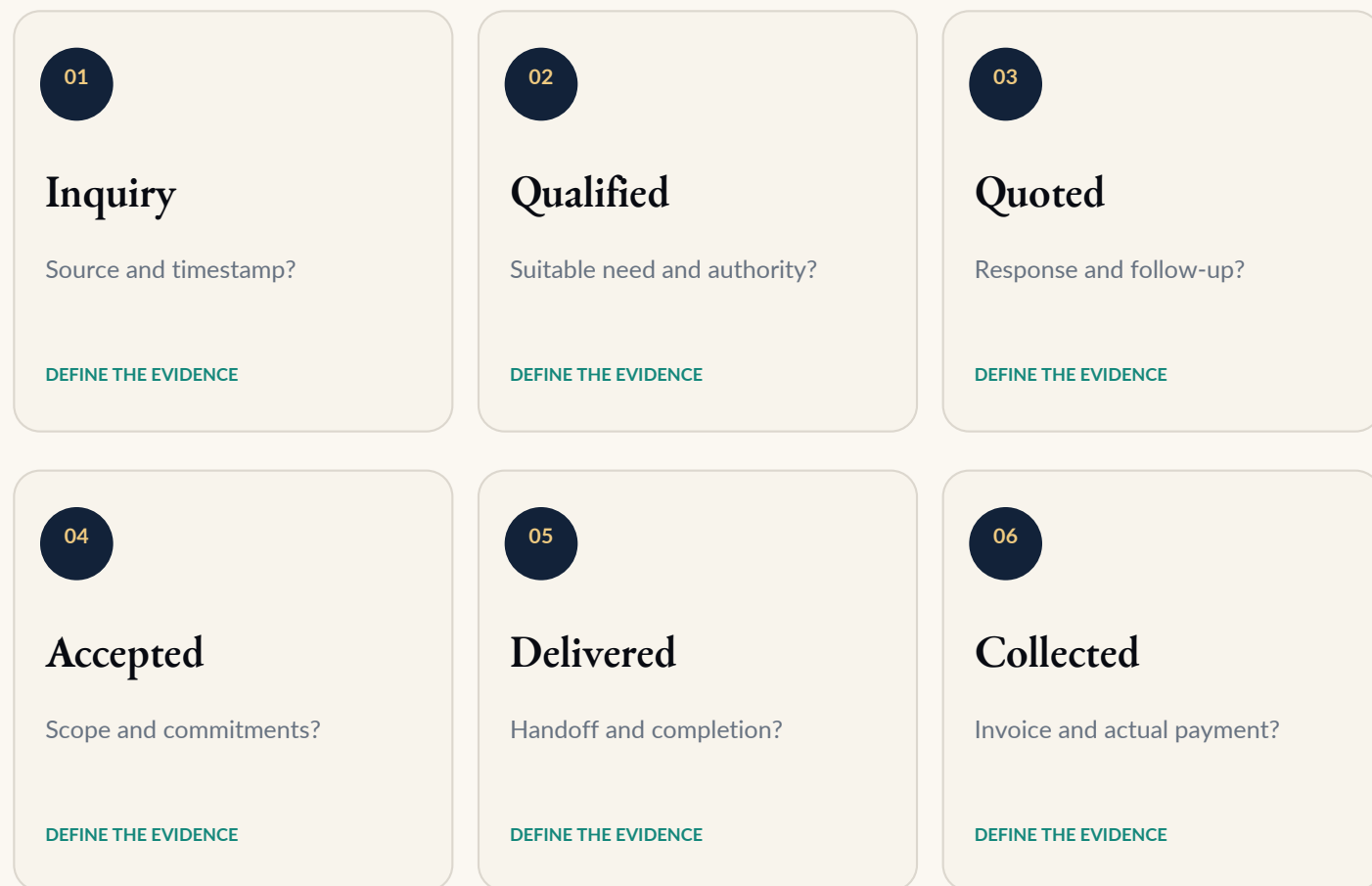
LISTENING PROTOCOL

Use open questions, request concrete examples, preserve confidentiality, and compare perspectives with process evidence before describing a root cause.

COMMERCIAL SYSTEM

See the entire revenue journey.

Track defined steps instead of relying on a single sales figure.



WHAT TO INSPECT, NOT ASSUME

Conversion definitions	Separate inquiry, quote, accepted work and collected revenue.
Stage ownership	Every active opportunity has a clear next action and owner.
Follow-up discipline	Check exceptions in real records rather than assuming loss.

OPERATING SYSTEM

Capacity is a sequence, not just a calendar.

The same scheduling decision can affect customer expectations, field readiness and cash timing.

01

Demand intake

What work is entering?

Inquiries, recurring commitments, priorities.

02

Capacity promise

What can we actually take?

Skills, equipment, travel, dependencies.

03

Assignment

Who owns the job?

Dispatch, job requirements, handoff notes.

04

Execution

What changes in the field?

Exceptions, customer updates, approvals.

05

Completion

When is work truly closed?

Evidence, billing handoff, follow-up.

POTENTIAL OPERATING METRIC

Share of jobs started with complete required information, by defined job type and time period. Establish a baseline before setting a target.

FINANCIAL DECISION LENS

Know which numbers inform which decisions.

Advisory analysis of operating visibility; not a substitute for professional accounting, tax or legal advice.

REVENUE QUALITY

What work generates cash?

LOOK FOR / Type, customer, timing, collection.

JOB ECONOMICS

What actually consumes resources?

LOOK FOR / Labor, materials, travel, rework.

CAPACITY

Where is time spent?

LOOK FOR / Scheduling, admin effort, utilization.

CASH TIMING

When does money move?

LOOK FOR / Deposits, milestones, receivables.

DECISION VISIBILITY

What should owner review?

LOOK FOR / Agreed metrics and definitions.

RISK

Which assumptions might be wrong?

LOOK FOR / Missing records, exceptions, changes.

FINANCIAL DISCIPLINE

Avoid describing released employee time as money saved unless costs actually change. Validate financial figures against source records and qualified advisors.

DECISION ECONOMICS / TRANSPARENT EXAMPLE

Make the assumptions visible.

A fictional scenario illustrates capacity released; it does not predict ALPHA VISION client savings.

INQUIRIES EACH WEEK

40

illustrative input

INCOMPLETE INTAKE / BEFORE

25%

assumed baseline

INCOMPLETE INTAKE / AFTER

10%

hypothetical test case

EXTRA MINUTES EACH

12

per affected inquiry

FULLY LOADED HOURLY COST

\$28

planning assumption

OPERATING WEEKS

46

annualization assumption

ILLUSTRATIVE ARITHMETIC

BEFORE

2.0 h / week

AFTER (IF ACHIEVED)

0.8 h / week

POTENTIAL CAPACITY RELEASED

1.2 h / week

Illustrative annual labor-capacity equivalent: $1.2 \text{ h} \times \$28 \times 46 \text{ weeks} = \$1,545.60$. This is not cash savings, profit, ROI or a forecast; the assumptions are invented solely to demonstrate a transparent model.

ROOT-CAUSE DISCIPLINE

Test explanations before fixing them.

One visible symptom can have several competing explanations.

REPORTED SYMPTOM

"We cannot easily see whether inquiries were followed up."

H1

No named owner

Check intake assignments

H2

Missing tracking field

Audit sample records

H3

Delayed availability info

Trace office-to-field handoff

DECISION GATE: WHAT WOULD CHANGE OUR MIND?

If ownership is already recorded...

Look for handoff delay, training or another mechanism.

If timestamps show prompt follow-up...

Do not claim follow-up is the primary issue.

If exceptions are rare and justified...

Do not redesign owner authority without stronger evidence.

THE PRIORITY PORTFOLIO

Choose sequence - not just importance.

Illustrative decision logic weighs potential relevance, evidence, effort, ownership and prerequisites.

01

Create an intake owner rule

TEST FIRST

Low structural effort; direct visibility gain if ownership is unclear.

02

Define manager escalation limits

PROPOSE

Needs owner approval and actual exception review.

03

Clarify scheduling handoffs

INVESTIGATE

Confirm frequency and impact before redesigning.

04

Build a five-metric owner review

DESIGN

Must wait for clean definitions and source consistency.

WHAT MAKES A DECISION HIGH PRIORITY?

Materiality to the owner; strength of evidence; delivery effort; dependencies; willingness and capacity to act. Higher uncertainty calls for research, not automatic implementation.

IMPLEMENTATION / ILLUSTRATIVE ROADMAP

A 90-day decision path.

Not a promise of a 90-day ALPHA VISION engagement. This is an example of how an owner might phase approved work.

DAYS 01-30

SEE IT CLEARLY

- Confirm scope and source records
- Observe recent inquiry handoffs
- Agree on one priority and owner
- Set baseline and stop rules

DAYS 31-60

TRY IT IN PRACTICE

- Approve narrow procedure draft
- Practice two common exceptions
- Run a limited pilot
- Collect questions and defects

DAYS 61-90

CHECK AND DECIDE

- Check adoption of the rule
- Review exceptions and evidence
- Decide whether to expand or revise
- Hand off owned next actions

EVERY GATE REQUIRES AN OWNER

Real project milestones, advisor effort, timing and implementation assistance depend on the actual signed engagement and client participation.

OPERATING CADENCE

Turn recommendations into ownership.

A lightweight weekly rhythm prevents the roadmap from becoming a document that nobody uses.

WEEKLY OWNER REVIEW / 25-MINUTE EXAMPLE

05 min

Exceptions

07 min

Customer flow

08 min

Priority decisions

05 min

Owner commitments

DECISION LOG / SAMPLE FIELDS

DATE	DECISION / ASSUMPTION	OWNER	CHECK DATE
Wk 1	Approve intake ownership rule	Owner	Wk 2
Wk 2	Check two exception examples	Manager	Wk 3
Wk 3	Decide retain / revise pilot	Owner	Wk 4

MEETING OUTPUTS

- One decision recorded.
- One accountable owner.
- One next date and evidence check.

VERIFICATION FRAMEWORK

Activity is not the same as impact.

The right metric depends on the change being tested, the available evidence, and the decision it should inform.

1**DESIGNED**

A procedure has been drafted.

Evidence: versioned document.

2**APPROVED**

The right person accepted the rule.

Evidence: approval record.

3**INTRODUCED**

Participants received the change.

Evidence: briefing and assignment.

4**PRACTICED**

People rehearsed the intended action.

Evidence: exercise record.

5**ADOPTED**

Real work followed the rule.

Evidence: sampled operational records.

6**MEASURED**

A valid outcome comparison exists.

Evidence: defined baseline and period.

REPORTING STANDARD

Avoid describing approved documents, simulation scores or released capacity as realized financial outcomes.

RISKS AND STOP RULES

Protect the business while improving it.

Proposals should make uncertainty visible and specify when to pause, revise or escalate.

Unclear authority

A new process bypasses a required approval.

CONTROL: Confirm rule with owner before pilot.

Bad underlying data

Metrics reward wrong behavior.

CONTROL: Trace data definitions to real records.

Change overload

Team cannot absorb another process.

CONTROL: Limit scope; identify capacity.

Privacy exposure

Research or reporting captures sensitive details.

CONTROL: Restrict access and redact.

No measurable baseline

Results could be asserted without evidence.

CONTROL: Define measures before test.

Advisor overreach

Engagement implies legal/tax guarantees.

CONTROL: Refer to qualified specialist.

THE OPERATING TOOLKIT

Useful after the conversation ends.

These are examples of working assets an engagement might use, subject to agreed scope and approval.

A**Business context register**

What is known, reported, uncertain and relevant.

B**Connected workflow map**

The real handoffs, decisions and exception points.

C**Responsibility and decision guide**

Who acts, approves, supports and backs up.

D**Improvement record**

Rationale, evidence, status, owner and version.

E**Verification plan**

Baseline, adoption checks and outcome limits.

F**Executive decision brief**

Small number of owner-level decisions and next steps.

SCOPE MATTERS

This document illustrates a range of working assets; it does not promise that every item is included in a particular \$2,500 engagement.

EXECUTIVE OPERATING BRIEF

One page the owner could actually use.

Illustrative weekly template with no invented performance results.

OWNER FOCUS FOR THE WEEK

What is the single most important decision still open?

CUSTOMER FLOW

STATUS: NOT ENTERED

Inquiries / next-action ownership / response visibility

OPERATIONS

STATUS: NOT ENTERED

Jobs at risk / handoffs / exceptions

PEOPLE

STATUS: NOT ENTERED

Decisions needing clarification / practice

FINANCIAL VISIBILITY

STATUS: NOT ENTERED

One material cost or cash timing question

WEEKLY DECISION RECORD

Decision to make: _____ Accountable owner: _____

Evidence needed: _____ Next review date: _____

FROM SAMPLE TO ENGAGEMENT

What the real work should mean.

The sample demonstrates an approach; the actual client engagement must specify what will be delivered.

WHAT A SCOPED ADVISORY ENGAGEMENT CAN RESPONSIBLY PROVIDE

1

A broad starting perspective

Discuss connected areas of the business before narrowing the priority.

2

Evidence-based priorities

Separate supported observations, assumptions and unresolved questions.

3

An actionable path forward

Document agreed next steps, responsibility and relevant boundaries.

4

Hands-on advisory support

Provide the working involvement expressly included in the engagement.

5

An honest explanation of limits

Identify specialist needs, constraints, dependencies and unknowns.

COMMERCIAL INTEGRITY

ALPHA VISION currently positions a \$2,500 whole-business advisory engagement. The final agreement must define work, deliverables, timing, participation and exclusions.

THE NEXT CONVERSATION

ALPHA VISION
METHOD

You do not have to
see it all alone.

The value of a new perspective is not that someone arrives with all the answers. It is that you can begin asking better questions, understand the trade-offs, and decide what deserves attention next.

LET US TALK ABOUT YOUR BUSINESS

Book a private introductory conversation through the ALPHA VISION METHOD website. No obligation to purchase.

ALPHA VISION METHOD LLC

GOOD BUSINESS IS GOOD FOR BOTH PEOPLE.