FICTIONAL DEMONSTRATION. NOT A REAL CUSTOMER REPORT.

Hidden Profit Intelligence

A diagnostic of your Leadership Operating System

Northbridge Industrial Supplies (fictional)

Managing Director | Turnover band £30M to £50M | Leadership team of 6

3 apparent strengths | 5 to explore or develop | 7 gaps needing attention

Basis: your 30 rated answers and written responses. A screening assessment of leadership and governance. It is not an audit of your accounts and it is not financial, tax or legal advice.

SECTION 01

Executive summary and business context

Business context	Northbridge Industrial Supplies (fictional). Turnover band £30M to £50M. Leadership team of 6. Primary territory: United Kingdom.
What the answers show	Across 15 operating gaps: 3 apparent strengths, 2 development opportunities, 3 to investigate, 7 needing attention.
Where to look first	Gap 8 Too Much Still Depends on You (Founder Bottleneck); Gap 13 You Cannot See Where the Money Is Going (Financial Blindness); Gap 14 Revenue Is Growing, But Profit Is Not (Revenue Leakage)
Most connected gaps	Gap 8 Too Much Still Depends on You (Founder Bottleneck), Gap 13 You Cannot See Where the Money Is Going (Financial Blindness) (active). These often sit alongside other gaps, so they are worth investigating first. Whether they cause the other gaps in your business is a question for the findings session.
Strongest and weakest levers	Strongest: Accountability and Mindset. Weakest: Cost Leadership and People.
Seven day starting move	Map the twenty decisions the CEO personally makes most often and classify each as keep, delegate with guardrails, or delegate fully. Start with the example you gave: Medium term

Distinct layers, kept apart

This report keeps three things separate. **Scores** are the numbers you gave. **Evidence** is what your written answers add or contradict. **Interpretation** is the working reading offered here, which Vijay reviews before the report reaches you. A score alone never makes something a strength or a gap without that check.

SECTION 02

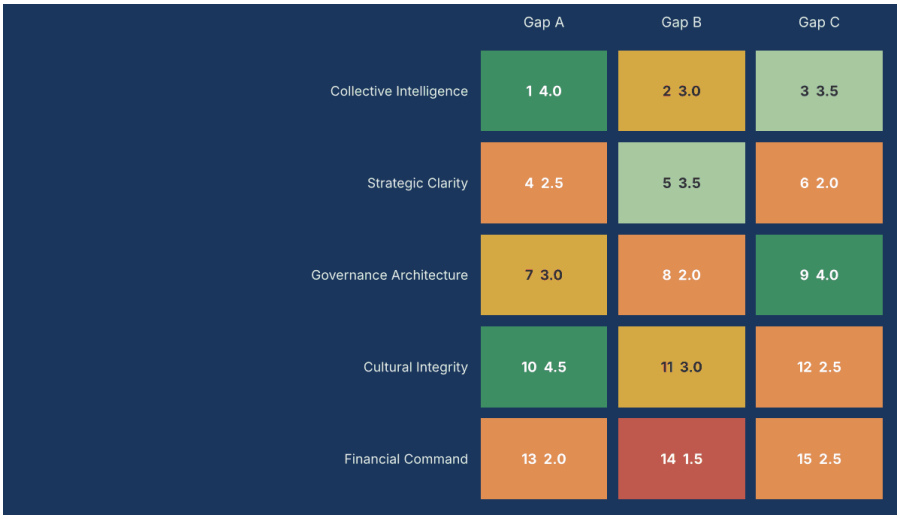
How to read your results

Average of the two ratings	Reading
4.0 to 5.0	**Apparent strength**, subject to evidence.
3.5	**Development opportunity**. Room to improve or some uncertainty.
Exactly 3.0	**Investigate**. A neutral score is not treated as a gap. It prompts a conversation about what sits behind it.
2.0 to 2.5	**Potentially significant gap**.
Below 2.0	**High priority gap**.

Each gap rests on only two of your ratings, so a single answer can move a gap across a boundary. That is why scores near a boundary are discussed, not decided by arithmetic. The framework is provisional and is not a validated psychometric instrument.

SECTION 03

The gap heat map



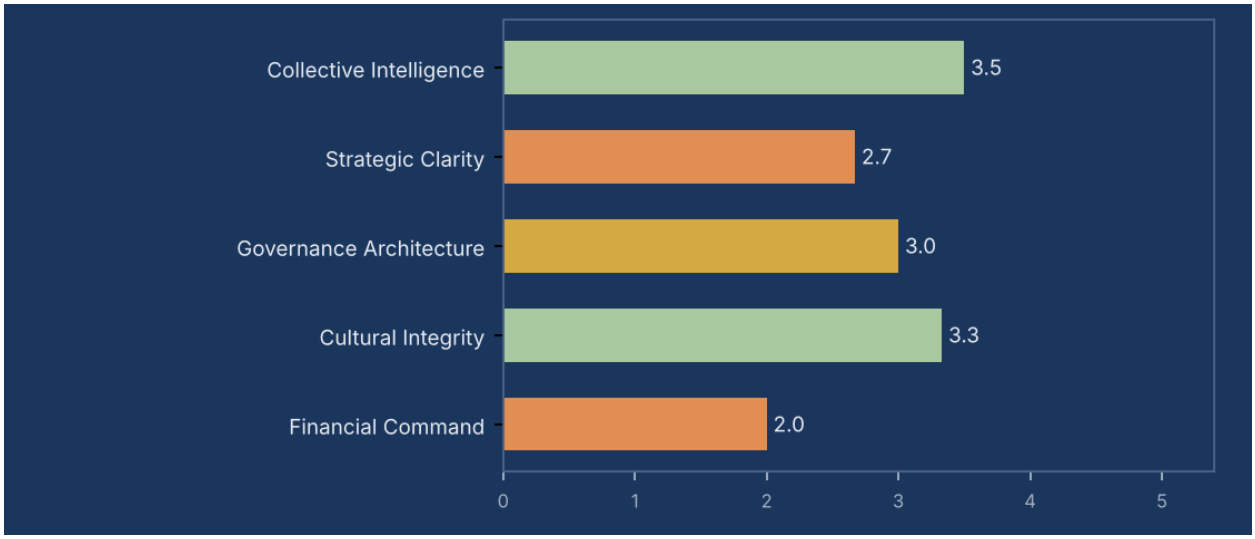
Each cell shows the gap number and the average of your two ratings. Gap names are in the table below.

Dimension	Gap	Your ratings	Reading
Collective Intelligence	1 Leadership Team Pulling in Different Directions (Leadership Fragmentation)	4 and 4	Apparent strength
Collective Intelligence	2 Information Does Not Reach the Right People (Information Hoarding)	3 and 3	Investigate
Collective Intelligence	3 Difficult Issues Do Not Get Addressed (Conflict Avoidance)	4 and 3	Development opportunity
Strategic Clarity	4 Too Many Priorities, Not Enough Progress (Priority Overload)	2 and 3	Potentially significant gap
Strategic Clarity	5 Priorities Keep Changing (Strategy Drift)	3 and 4	Development opportunity
Strategic Clarity	6 The Business Is Losing Touch With the Market (Market Disconnection)	2 and 2	Potentially significant gap
Governance Architecture	7 Decisions Take Too Long (Decision Paralysis)	3 and 3	Investigate
Governance Architecture	8 Too Much Still Depends on You (Founder Bottleneck)	2 and 2	Potentially significant gap
Governance Architecture	9 Too Many Meetings, Too Little Action (Meeting Dysfunction)	4 and 4	Apparent strength
Cultural Integrity	10 How People Work Does Not Match What You Say Matters (Values Disconnection)	4 and 5	Apparent strength
Cultural Integrity	11 Nobody Really Owns the Result (Accountability Erosion)	3 and 3	Investigate
Cultural Integrity	12 Decisions Do Not Turn Into Action (Execution Decay)	2 and 3	Potentially significant gap
Financial Command	13 You Cannot See Where the Money Is Going (Financial Blindness)	2 and 2	Potentially significant gap
Financial Command	14 Revenue Is Growing, But Profit Is Not (Revenue Leakage)	1 and 2	High priority gap

Dimension	Gap	Your ratings	Reading
Financial Command	15 Growth Is Putting Pressure on Cash (Cash Flow Fragility)	2 and 3	Potentially significant gap

SECTION 04

Five operating dimensions



Each bar is the average of the six ratings in that dimension. A dimension average can hide a single weak gap, so read it together with the heat map.

Dimension	Average	Reading
Financial Command	2.0	Potentially significant gap
Strategic Clarity	2.7	Potentially significant gap
Governance Architecture	3.0	Investigate
Cultural Integrity	3.3	Development opportunity
Collective Intelligence	3.5	Development opportunity

SECTION 05
Strengths to protect

These are apparent strengths: your own ratings average 4.0 or more. They are subject to evidence, so each one is a hypothesis to confirm, not a finding. Strengths matter because growth, pressure and change are most likely to erode what is working today.

Gap 1: Leadership Team Pulling in Different Directions (Leadership Fragmentation)	What it looks like: Decisions made on Monday produce the same action in every department by Friday, and the team can show it. Your ratings: 4 and 4. To confirm: ask for one recent example.
Gap 9: Too Many Meetings, Too Little Action (Meeting Dysfunction)	What it looks like: Meetings end with clear decisions and owners, and time is spent on the topics that matter most. Your ratings: 4 and 4. To confirm: ask for one recent example.
Gap 10: How People Work Does Not Match What You Say Matters (Values Disconnection)	What it looks like: Leaders describe the culture in a similar way, and values are visibly used in real decisions. Your ratings: 4 and 5. To confirm: ask for one recent example.

SECTION 06
Evidence and contradictions identified

Your ratings and your written answers do not always point the same way. That is normal and informative. Nothing below has changed any score. Each item is a question to explore.

Area	What we noticed	Question to explore
Gap 2 Information Does Not Reach the Right People (Information Hoarding)	A neutral score on both ratings	Which piece of knowledge would hurt most if one person left tomorrow?
Gap 7 Decisions Take Too Long (Decision Paralysis)	A neutral score on both ratings	Which decision has waited longest and why?
Gap 9 Too Many Meetings, Too Little Action (Meeting Dysfunction)	Rated as a strength, but a written answer describes friction in a connected gap	Which recurring agenda item has produced no decision in three meetings?
Gap 11 Nobody Really Owns the Result (Accountability Erosion)	A neutral score on both ratings	What usually happens after a missed deadline here?

In your words

What is the single biggest challenge facing your leadership team right now?
Everything goes through me and our margin is slipping while we grow. We are busy but I cannot say where the profit goes.
If you could fix one thing in your business overnight, what would it be?
I would fix visibility of margin by customer and product so that our sales team stopped discounting blind.
What has changed in your business or market over the last 12 months that the leadership team has not fully addressed?
Two national competitors have moved into our core fasteners range and we have not revisited how we price against them. Our biggest customer has also started to buy direct from a manufacturer for some lines.
Where do you believe the business is losing the most money or value, even if you cannot quantify it precisely?
Discounting and scope creep on larger accounts, and delivery charges we are not recovering. I suspect we give away free delivery on small orders that cost us more than the margin.

SECTION 07

The IMPACT model applied to your business

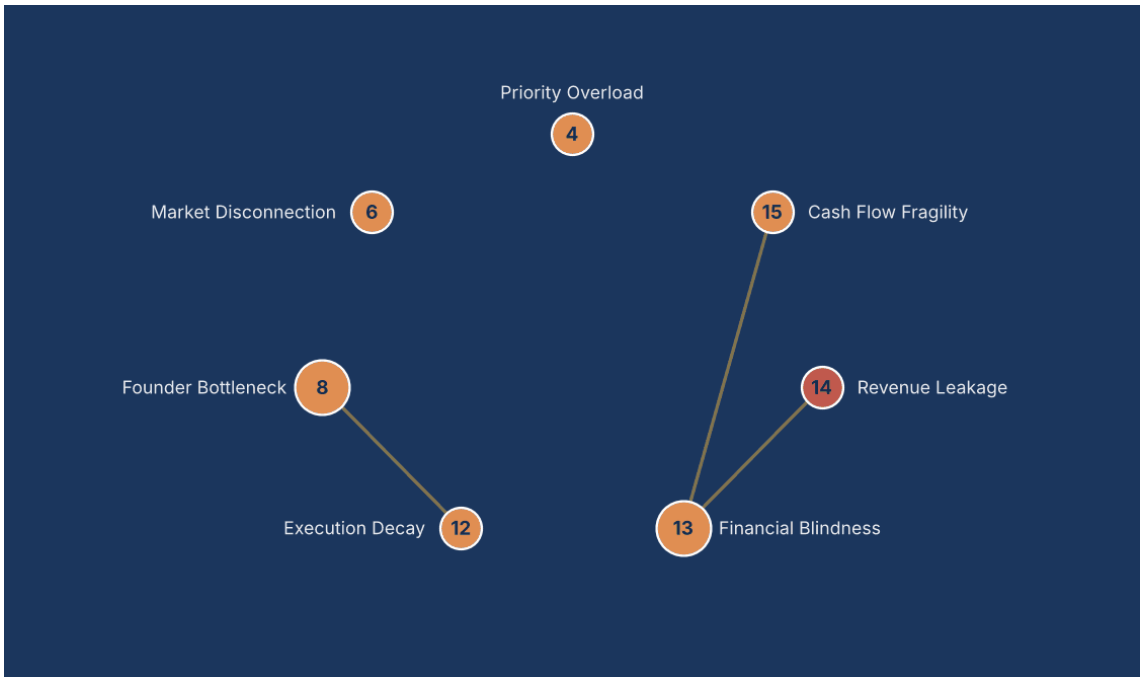


The six IMPACT levers are scored from their own questions, separate from the 15 gaps. A lever describes a way of leading. A gap describes a place where the system produces friction. The levers are a structured reading of your answers, not an independently validated psychometric measure.

Intention	3.2 out of 5. Clarity of direction and shared priorities. Without a clear shared direction, effort spreads and the other levers have nothing to align to.
Mindset	3.2 out of 5. Willingness to challenge, test and decide. A narrow mindset lever tends to show up as untested assumptions and slow decisions.
People	2.6 out of 5. Capability, delegation and shared knowledge. A weaker people lever shows up as dependence on a few individuals.
Accountability	3.4 out of 5. Follow through, clear ownership and consistent response. A weaker accountability lever shows up as drifting commitments and repeated discussions.
Cost Leadership	2.2 out of 5. Financial visibility, pricing discipline and use of time. A weaker cost leadership lever shows up as limited sight of where margin and time are lost.
Traction	2.8 out of 5. Converting plans into results and keeping cash under control. A weaker traction lever shows up as good plans that do not complete.

SECTION 08

Connections to investigate



Only gaps needing attention are shown. A line marks a potential connection to investigate, based on how these gaps often relate in leadership teams. It is not proof that one gap causes another in your business. Larger markers are Gap 8 and Gap 13 where active.

Where connections are most worth investigating

Gap 8 Too Much Still Depends on You (Founder Bottleneck): This is one of the most connected gaps. When decisions depend on one person, it can contribute to fragmentation, avoided conflict, slow decisions, weak meetings, weaker accountability and slower execution. These are links to investigate, not proven causes.
Gap 13 You Cannot See Where the Money Is Going (Financial Blindness): This is one of the most connected gaps. Without it, revenue leakage and cash fragility are hard to see and therefore hard to fix.

SECTION 09

Dimension by dimension

Dimensions are shown most pressing first. Gaps needing attention receive full treatment. Gaps to investigate receive the questions to ask. Strengths and development opportunities are summarised.

Financial Command (Potentially significant gap, average 2.0)

Gap 13: You Cannot See Where the Money Is Going (Financial Blindness)	Potentially significant gap
Working interpretation (to verify)	The leadership team lacks a quick, trusted view of where margin is made and lost, and which customers or products are genuinely profitable.
Why it can matter	This is one of the most connected gaps. Without it, revenue leakage and cash fragility are hard to see and therefore hard to fix.
Self reported score	Q25: Our finance lead can tell us within 60 seconds where our biggest margin leak currently is. **(2 of 5)**
Self reported score	Q26: We know which clients or products are genuinely profitable once all costs are properly allocated. **(2 of 5)**
To verify	Which customers or products do we believe are profitable without proof?

Three practical steps

1. Ask the finance lead to identify the largest known margin leak within a week, and note how long it took.

2. Produce a profitability view by customer or product with costs properly allocated, even if approximate at first.

3. Add a one page margin summary to the monthly leadership meeting and agree who acts on it.

What good looks like in 90 days. The finance lead can name the biggest margin leak within a minute, and profitable and unprofitable work is clearly understood.

How you would know it is improving

- Time for the finance lead to name the largest margin leak.
- Share of revenue with a reliable profitability view by customer or product.

Questions for your leadership team

- Which customers or products do we believe are profitable without proof?
- What does the leadership team see each month about margin?
- What would we do differently if we knew true profitability today?

Gap 14: Revenue Is Growing, But Profit Is Not (Revenue Leakage)	High priority gap
Working interpretation (to verify)	Pricing and scope are not always controlled by margin evidence, so value can leave through discounting, scope creep and unrecovered work.
Why it can matter	Small leaks repeated across many transactions can be significant, and they are rarely visible without the profitability view described in Gap 13.
Self reported score	Q27: Pricing decisions are based on margin data, not guesswork or competitor matching alone. **(1 of 5)**
Self reported score	Q28: Scope creep on client work is identified and recharged or controlled. **(2 of 5)**
Evidence in your words	...rgin by customer and product so that our sales team stopped discounting blind.... (written answer q32)
Evidence in your words	...Discounting and scope creep on larger accounts, and delivery charges we are not recovering. I suspect we gi... (written answer q34)
To verify	Who can approve a discount, and how often is it used?

Three practical steps

1. Review the last twenty quotes or contracts for discounts and unbilled scope.

2. Set a discount approval limit and a simple scope change process with a recharge rule.

3. Report monthly on discounts given and scope recovered.

What good looks like in 90 days. Pricing is based on margin data, and scope changes are identified and recharged or controlled.

How you would know it is improving

- Total discounts given as a share of list price.
- Value of scope changes recharged or declined.

Questions for your leadership team

- Who can approve a discount, and how often is it used?
- What work did we deliver last quarter that we did not bill?
- How do we know a price is right?

Gap 15: Growth Is Putting Pressure on Cash (Cash Flow Fragility)	Potentially significant gap
Working interpretation (to verify)	The organisation may not be able to absorb a late payment or demand shock comfortably, and the forward view of cash may be unclear.
Why it can matter	Cash problems tend to arrive suddenly even when they have built slowly, and they reduce the options available to the leadership team.
Self reported score	Q29: Our cash position would stay comfortable even if our largest customer paid 60 days late. **(2 of 5)**
Self reported score	Q30: We have a clear, current view of working capital and cash flow for the next 90 days. **(3 of 5)**
To verify	What would happen if our biggest customer paid 60 days late?

Three practical steps

1. Build a rolling 13 week cash forecast and review it weekly.

2. Test the position if the largest customer paid 60 days late and write down the response.

3. Agree early warning measures for cash and the actions each would trigger.

What good looks like in 90 days. There is a clear current view of working capital and cash for the next 90 days, and the position is resilient to a major late payment.

How you would know it is improving

- Weeks of cash visibility in a maintained forecast.
- Cash position under a 60 day late payment from the largest customer.

Questions for your leadership team

- What would happen if our biggest customer paid 60 days late?
- Who owns the cash forecast and how often is it reviewed?
- Which early warning would we have missed last time?

Strategic Clarity (Potentially significant gap, average 2.7)

Gap 4: Too Many Priorities, Not Enough Progress (Priority Overload)	Potentially significant gap
Working interpretation (to verify)	The leadership team is carrying more priorities than the organisation can deliver, and not everyone could name the same top few.
Why it can matter	Spreading attention across many priorities dilutes effort, delays results and makes it hard to say no to new requests.
Self reported score	Q7: The leadership team is focused on 3 or fewer strategic priorities at any time. **(2 of 5)**
Self reported score	Q8: Every leader could independently list the same top 3 priorities if asked right now. **(3 of 5)**
To verify	What would we stop if we had to cut our list to three?

Three practical steps

1. Reduce the active list to three strategic priorities and move everything else to a visible parked list.

2. Ask each leader to write the top three from memory and compare the answers in the next meeting.

3. Add a standing test to the agenda: does this new request displace one of the three, or wait?

What good looks like in 90 days. Every leader can state the same three priorities independently, and new work is judged against them.

How you would know it is improving

- Number of active strategic priorities (target set by the team).
- Share of leaders who can name the same top three priorities unprompted.

Questions for your leadership team

- What would we stop if we had to cut our list to three?
- Who decides when a new request replaces an existing priority?
- Which priority has been on the list longest without progress?

Gap 5: Priorities Keep Changing (Strategy Drift)	Development opportunity
Self reported score	Q9: The strategy in our current plan reflects what we are actually doing today. **(3 of 5)**
Self reported score	Q10: Any change in direction over the last 12 months has been formally discussed and agreed. **(4 of 5)**

A modest development opportunity. A useful next step: Compare the current plan with the last twelve months of actual decisions and list where they differ.

Gap 6: The Business Is Losing Touch With the Market (Market Disconnection)	Potentially significant gap
Working interpretation (to verify)	Decisions are being made with limited current evidence from customers and the market.
Why it can matter	Pricing and strategy built on assumptions that are not tested can drift away from what customers value and what competitors are doing.
Self reported score	Q11: Our pricing has been reviewed against real market evidence within the last 12 months. **(2 of 5)**
Self reported score	Q12: Key assumptions behind our strategy have been tested with customers or data, not just assumed. **(2 of 5)**
Evidence in your words	...rs have moved into our core fasteners range and we have not revisited how we price against them. Our biggest customer has also started to buy direct from a manufa... (written answer q33)
To verify	Which assumption would hurt most if it were wrong?

Three practical steps

1. Test your three most important strategic assumptions with customers or data within 30 days.

2. Review pricing against current market evidence and record what you found.

3. Schedule a quarterly conversation with five customers whose only purpose is listening.

What good looks like in 90 days. Key assumptions and pricing are checked against real evidence at least once a year, and ideally each quarter.

How you would know it is improving

- Number of strategic assumptions tested with customers or data in the last year.
- Months since pricing was last compared with market evidence.

Questions for your leadership team

- Which assumption would hurt most if it were wrong?
- When did we last hear from a customer we did not choose?

• What has changed in the market that we have not priced in?

Governance Architecture (Investigate, average 3.0)

Gap 7: Decisions Take Too Long (Decision Paralysis)	Investigate
Self reported score	Q13: Significant decisions get made and closed within days, not weeks. **(3 of 5)**
Self reported score	Q14: Agenda items rarely get carried over from one meeting to the next without resolution. **(3 of 5)**

Both ratings are 3. That is a neutral answer, not a gap. Explore: Which decision has waited longest and why? Who owns each open decision today?

Gap 8: Too Much Still Depends on You (Founder Bottleneck)	Potentially significant gap
Working interpretation (to verify)	Too many decisions route through the CEO, so the organisation's pace is limited by one person's availability.
Why it can matter	This is one of the most connected gaps. When decisions depend on one person, it can contribute to fragmentation, avoided conflict, slow decisions, weak meetings, weaker accountability and slower execution. These are links to investigate, not proven causes.
Self reported score	Q15: Most operational decisions happen without needing the CEO's personal sign off. **(2 of 5)**
Self reported score	Q16: The leadership team could continue making sound decisions for a month without the CEO. **(2 of 5)**
Evidence in your words	...Everything goes through me and our margin is slipping while we grow. We are busy but I cannot say where th... (written answer q31)
To verify	Which five decisions would we most like to stop reaching the CEO?

Three practical steps

1. Map the twenty decisions the CEO personally makes most often and classify each as keep, delegate with guardrails, or delegate fully.

2. Delegate the first five with written limits (spend, risk, customer impact) and a simple weekly report back.

3. Review after 30 days which delegated decisions were made well and what support the owners need.

What good looks like in 90 days. Most operational decisions are taken without the CEO, and the leadership team could carry on sound decision making for a month in their absence.

How you would know it is improving

• Share of operational decisions made without the CEO.
• Number of days the leadership team could operate sound decisions without the CEO.

Questions for your leadership team

• Which five decisions would we most like to stop reaching the CEO?
• What guardrails would make delegating each one safe?
• What is the CEO uniquely needed for, and what has simply become habit?

Gap 9 Too Many Meetings, Too Little Action (Meeting Dysfunction): apparent strength (ratings 4 and 4). Measure to keep watching: Share of meetings ending with decisions, owners and dates recorded.

Cultural Integrity (Development opportunity, average 3.3)

Gap 10 How People Work Does Not Match What You Say Matters (Values Disconnection): apparent strength (ratings 4 and 5). Measure to keep watching: Number of decisions in the last quarter explicitly tested against stated values.

Gap 11: Nobody Really Owns the Result (Accountability Erosion)	Investigate

Self reported score	Q21: When a deadline is missed, there is a clear and consistent response. **(3 of 5)**
Self reported score	Q22: Commitments made in meetings are still being honoured a month later. **(3 of 5)**

Both ratings are 3. That is a neutral answer, not a gap. Explore: What usually happens after a missed deadline here? Who tracks commitments between meetings?

Gap 12: Decisions Do Not Turn Into Action (Execution Decay)	Potentially significant gap

Working interpretation (to verify)	Agreed plans are not reliably followed through to completion, so execution is weaker than the strategy behind it.
Why it can matter	This is where the cost of other gaps often becomes visible: good plans that stall quietly.
Self reported score	Q23: Plans agreed by the leadership team are followed through to completion. **(2 of 5)**
Self reported score	Q24: Execution of strategy is as strong as the strategy itself. **(3 of 5)**
To verify	Which plan has stalled and who owns it?

Three practical steps

1. Pick the three plans most important to the next quarter and assign one named owner to each.

2. Break each plan into milestones of four weeks or less with a visible status.

3. Hold a short fortnightly review that asks only what is blocked and what help is needed.

What good looks like in 90 days. Plans agreed by the leadership team are completed, and execution is as strong as the strategy.

How you would know it is improving

- Share of agreed plans completed by the original date.
- Number of initiatives stalled for more than four weeks.

Questions for your leadership team

- Which plan has stalled and who owns it?
- What blocked us last time, and is it still blocking us?
- What would we need to see in two weeks to know we are on track?

Collective Intelligence (Development opportunity, average 3.5)

Gap 1 Leadership Team Pulling in Different Directions (Leadership Fragmentation): apparent strength (ratings 4 and 4). Measure to keep watching: Share of agreed actions carried out as intended within the agreed date.

Gap 2: Information Does Not Reach the Right People (Information Hoarding)	Investigate

Self reported score	Q3: If a senior leader was unavailable for a month, the business would carry on without losing critical knowledge. **(3 of 5)**
Self reported score	Q4: Key processes and relationships are documented somewhere other than in one person's head. **(3 of 5)**

Both ratings are 3. That is a neutral answer, not a gap. Explore: Which piece of knowledge would hurt most if one person left tomorrow? What do we keep in people's heads because writing it down feels like extra work?

Gap 3: Difficult Issues Do Not Get Addressed (Conflict Avoidance)	Development opportunity

Self reported score	Q5: Leadership meetings include genuine challenge and debate, not just agreement. **(4 of 5)**
Self reported score	Q6: Underperformance is addressed directly and promptly, not tolerated. **(3 of 5)**

A modest development opportunity. A useful next step: Agree two ground rules for meetings: challenge the idea, not the person; and every significant proposal receives one structured objection.

SECTION 10

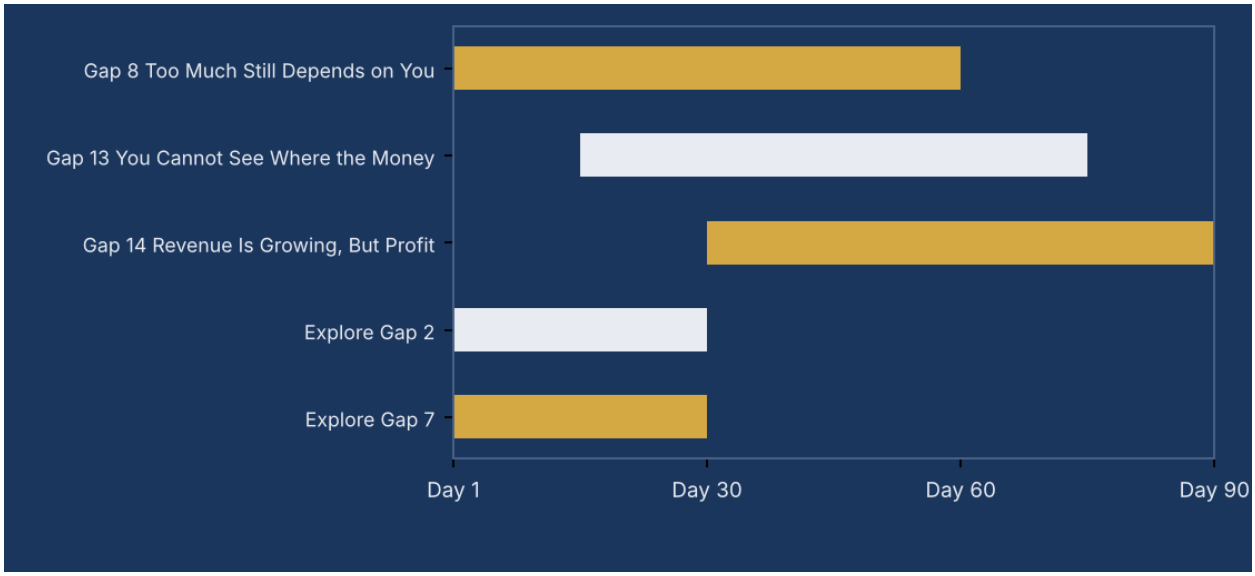
Prioritised recommendations

Rank	Gap	Why this order	First step	Owner (role)
1	8 Too Much Still Depends on You (Founder Bottleneck)	Potential connections to other active gaps; potentially significant gap, average 2.0	Map the twenty decisions the CEO personally makes most often and classify each as keep, delegate with guardrails, or delegate fully.	CEO
2	13 You Cannot See Where the Money Is Going (Financial Blindness)	Potential connections to other active gaps; potentially significant gap, average 2.0	Ask the finance lead to identify the largest known margin leak within a week, and note how long it took.	Finance lead
3	14 Revenue Is Growing, But Profit Is Not (Revenue Leakage)	high priority gap, average 1.5	Review the last twenty quotes or contracts for discounts and unbilled scope.	Commercial and finance leads
4	6 The Business Is Losing Touch With the Market (Market Disconnection)	potentially significant gap, average 2.0	Test your three most important strategic assumptions with customers or data within 30 days.	Commercial lead
5	4 Too Many Priorities, Not Enough Progress (Priority Overload)	potentially significant gap, average 2.5	Reduce the active list to three strategic priorities and move everything else to a visible parked list.	CEO
6	12 Decisions Do Not Turn Into Action (Execution Decay)	potentially significant gap, average 2.5	Pick the three plans most important to the next quarter and assign one named owner to each.	Operations lead
7	15 Growth Is Putting Pressure on Cash (Cash Flow Fragility)	potentially significant gap, average 2.5	Build a rolling 13 week cash forecast and review it weekly.	Finance lead

Rank	Gap	Why this order	First step	Owner (role)
8	2 Information Does Not Reach the Right People (Information Hoarding)	investigate, average 3.0	Explore with the leadership team: Which piece of knowledge would hurt most if one person left tomorrow?	Chief of Staff or operations lead

SECTION 11

Your 30, 60 and 90 day actions



Days 1 to 30	Days 31 to 60	Days 61 to 90
• Gap 8: Map the twenty decisions the CEO personally makes most often and classify each as keep, delegate with guardrails, or delegate fully.	• Gap 8: Delegate the first five with written limits (spend, risk, customer impact) and a simple weekly report back.	• Gap 8: Review after 30 days which delegated decisions were made well and what support the owners need.
• Gap 13: Ask the finance lead to identify the largest known margin leak within a week, and note how long it took.	• Gap 13: Produce a profitability view by customer or product with costs properly allocated, even if approximate at first.	• Gap 13: Add a one page margin summary to the monthly leadership meeting and agree who acts on it.
• Gap 14: Review the last twenty quotes or contracts for discounts and unbilled scope.	• Gap 14: Set a discount approval limit and a simple scope change process with a recharge rule.	• Gap 14: Report monthly on discounts given and scope recovered.
• Explore Gap 2 Information Does Not Reach the Right People (Information Hoarding): Which piece of knowledge would hurt most if one person left tomorrow?	• Review the 30 day result against the measure (Number of items needing CEO sign off each week.). Agree whether to continue, change or stop.	• Set written rules for AI use: data allowed, who checks the output and who owns the result.
• Explore Gap 7 Decisions Take Too Long (Decision Paralysis): Which decision has waited longest and why?	• Review what is working and adjust the sequence.	• Review progress against the measures and agree the next 90 days.
• Explore Gap 11 Nobody Really Owns the Result (Accountability Erosion): What usually happens after a missed deadline here?		• Review whether the strengths still hold: Gap 1, Gap 9, Gap 10.
• AI test for Gap 8: Log one week of items needing sign off, then ask AI to sort them by who could decide.		
• Agree owners and the measures you will track.		

The plan is a starting point for the 45 minute findings session, where sequence and owners are agreed against your real constraints.

SECTION 12

Commercial opportunities to validate

No savings, profit exposure or other financial estimate is made in this report. Each line below is a hypothesis drawn from your answers. It becomes a finding only when your own records confirm it.

Issue	Data required	Validation action	Owner (role)	Measure
Gap 8 Too Much Still Depends on You (Founder Bottleneck)	The CEO calendar and approval log for one month	Count the decisions that waited for the CEO and could have been delegated	CEO	Share of operational decisions made without the CEO.
Gap 13 You Cannot See Where the Money Is Going (Financial Blindness)	Management accounts for the last 12 months and any margin by customer or product	Time how long it takes to produce margin by customer and compare it with the accounts	Finance lead	Share of revenue with margin visible by customer or product; working days after month end to produce management accounts.
Gap 14 Revenue Is Growing, But Profit Is Not (Revenue Leakage) *You raised this in your own words.*	Discount approvals, quotes against invoices and scope change records on larger accounts	Sample ten larger accounts and compare quoted scope, delivered scope and invoiced amount	Commercial and finance leads	Share of larger accounts where invoiced value matches quoted scope; discounts approved as a share of list price.
Gap 6 The Business Is Losing Touch With the Market (Market Disconnection) *You raised this in your own words.*	Recent price lists, quote win and loss records and the competitor prices you know	Test your pricing against the competitors you named on five recent quotes	Commercial lead	Months since pricing was last compared with market evidence; win rate on recent quotes.
Gap 4 Too Many Priorities, Not Enough Progress (Priority Overload)	The current list of initiatives with owner, start date and expected finish	Count initiatives started against finished in the last two quarters	CEO	Number of active strategic priorities (target set by the team).
Gap 12 Decisions Do Not Turn Into Action (Execution Decay)	The plans started in the last year and their current status	Trace three stalled initiatives back to the point where they stopped	Operations lead	Share of agreed plans completed by the original date.
Gap 15 Growth Is Putting Pressure on Cash (Cash Flow Fragility)	The cash forecast, debtor ageing and payment history of the largest customers	Run a late payment test on the largest customer and record the response	Finance lead	Weeks of cash visible in a maintained forecast; days to produce an updated cash position.
Gap 2 Information Does Not Reach the Right People (Information Hoarding)	A list of the processes and relationships that depend on one person	Ask each leader which information they rely on that only one person holds	Chief of Staff or operations lead	Number of critical processes with a documented owner and a named second person.

Issue	Data required	Validation action	Owner (role)	Measure
Capacity and customer dependence you described *"The packing line sits idle most Friday afternoons and the second van runs at about half capacity. Our top three customers are around 58 per cent of sales and the largest alone is 3" (self reported)*	Capacity or utilisation records and revenue by customer for the last twelve months	Compare used with available hours or machine time, and list the share of revenue from your five largest customers	COO or finance lead	Utilisation percentage and share of revenue from the top five customers
The decision you said has waited	The numbers that were missing when the decision stalled	List the figures needed, who holds them and the date they can be produced	CEO with finance lead	Days from raising to closing the decision

Quantifying any of these is a separate step, done with your own figures and, where it matters, your finance adviser.

SECTION 13

AI and human intelligence

This section starts from what you told us about AI and from the gaps your ratings flagged. It is not an AI maturity score. A few written lines cannot measure maturity, and none is claimed. AI is treated as a way to give your people better information and more time. The judgement stays with them.

What you told us	"We use AI for internal reporting and are exploring it for demand planning, but our data is spread across three systems. I worry about accuracy and about staff time."
How we read it	Using AI and exploring more. Risks or concerns you raised: data handling, accuracy.
Suggested next step for your position	Check that each current use has an owner, a human check and a measure. Then trial the new idea on its own, one at a time.

Where AI could help, given your own gaps

Gap	Possible AI use	Human judgement still needed	First test (30 days)	Measure
8 Too Much Still Depends on You (Founder Bottleneck)	Use AI to draft routine responses and triage approvals so fewer items need the CEO.	The CEO sets approval limits and trusts the people closest to the information.	Log one week of items needing sign off, then ask AI to sort them by who could decide.	Number of items needing CEO sign off each week.
13 You Cannot See Where the Money Is Going (Financial Blindness)	Use AI to speed up management accounts commentary and margin by customer analysis from data you already hold.	Your finance lead verifies every figure before anyone relies on it.	Ask AI to analyse one month of existing sales and cost data by customer, then have finance check it.	Days to produce margin by customer.
14 Revenue Is Growing, But Profit Is Not (Revenue Leakage)	Use AI to scan quotes, scope changes and invoices for discounting and unbilled work.	People verify each indication in the records before acting on it.	Sample ten larger accounts and compare quoted, delivered and invoiced scope with AI help.	Share of sampled accounts where invoiced value is below delivered scope.

Governance first, then scale

Before any AI use touches customer, pricing or employee data, agree three things in writing: which data may and may not be used, who checks AI output before anyone acts on it, and who owns the result. Start with one low risk use, measure it for thirty days, and extend only if the measure moves.

Everything above is a hypothesis to test in your own business. This report makes no estimate of savings, time released or profit, and no claim about the results AI will deliver for you.

SECTION 14

Methodology and limitations

What this is. A structured screening of your leadership operating system from 30 rated statements across five dimensions and fifteen gaps, plus nine written questions, one of which asks about AI and is used in the AI and human intelligence section.

How gaps are read. Each gap rests on two positively worded ratings. The average is read against the framework on page 3. An average of exactly 3.0 prompts investigation. Written answers are checked for agreement with the ratings and any difference is shown, never resolved silently.

The IMPACT levers. Each rated statement also feeds exactly one of six levers. The levers are a structured reading of your answers and are not independently validated psychometric measures.

No financial estimates. The report does not estimate savings, profit exposure or returns. It lists what to check in your own records.

Limits. The report reflects what you reported. It does not see your accounts, customers or people, and it is not an audit. It does not predict results or promise an improvement in profit. It is not financial, tax or legal advice. The classification framework is provisional and will be refined as more reports are reviewed.

APPENDIX

Your answers

Q	Statement	Rating	Gap no.	Lever
1	When the leadership team agrees an action in a meeting, everyone does what was agreed, on time.	4	1	Traction
2	Decisions made in meetings translate consistently into the same actions across departments.	4	1	Accountability
3	If a senior leader was unavailable for a month, the business would carry on without losing critical knowledge.	3	2	People
4	Key processes and relationships are documented somewhere other than in one person's head.	3	2	People
5	Leadership meetings include genuine challenge and debate, not just agreement.	4	3	Mindset
6	Underperformance is addressed directly and promptly, not tolerated.	3	3	People
7	The leadership team is focused on 3 or fewer strategic priorities at any time.	2	4	Intention
8	Every leader could independently list the same top 3 priorities if asked right now.	3	4	Intention

Q	Statement	Rating	Gap no.	Lever
9	The strategy in our current plan reflects what we are actually doing today.	3	5	Intention
10	Any change in direction over the last 12 months has been formally discussed and agreed.	4	5	Intention
11	Our pricing has been reviewed against real market evidence within the last 12 months.	2	6	Mindset
12	Key assumptions behind our strategy have been tested with customers or data, not just assumed.	2	6	Mindset
13	Significant decisions get made and closed within days, not weeks.	3	7	Mindset
14	Agenda items rarely get carried over from one meeting to the next without resolution.	3	7	Accountability
15	Most operational decisions happen without needing the CEO's personal sign off.	2	8	People
16	The leadership team could continue making sound decisions for a month without the CEO.	2	8	People
17	Leadership meetings consistently end with clear decisions and named owners.	4	9	Accountability
18	Meeting time is spent on the right topics, not repeating the same discussions.	4	9	Cost Leadership
19	If asked separately, each leader would describe our culture and values in a similar way.	4	10	Intention
20	Our stated values genuinely influence decisions, not just appear on the wall or website.	5	10	Mindset
21	When a deadline is missed, there is a clear and consistent response.	3	11	Accountability
22	Commitments made in meetings are still being honoured a month later.	3	11	Accountability
23	Plans agreed by the leadership team are followed through to completion.	2	12	Traction
24	Execution of strategy is as strong as the strategy itself.	3	12	Traction
25	Our finance lead can tell us within 60 seconds where our biggest margin leak currently is.	2	13	Cost Leadership
26	We know which clients or products are genuinely profitable once all costs are properly allocated.	2	13	Cost Leadership
27	Pricing decisions are based on margin data, not guesswork or competitor matching alone.	1	14	Cost Leadership
28	Scope creep on client work is identified and recharged or controlled.	2	14	Cost Leadership
29	Our cash position would stay comfortable even if our largest customer paid 60 days late.	2	15	Traction
30	We have a clear, current view of working capital and cash flow for the next 90 days.	3	15	Traction

CLOSING

Where this leaves you

Your Leadership Operating System is the way your leadership team decides, aligns, governs and delivers. This report shows where yours is working well, where it is under strain, and which gaps are connected to each other.

The most useful next step is the 45 minute findings session, where we test these findings against what you know, resolve the questions marked for exploration and agree the first 90 days.

What this report cannot do: it cannot see your accounts, your customers or your people. It will be wrong in places. Tell me where.

Vijay Mistri
Leadership Operating System Architect

Clarity first. IMPACT fast.