# SAMPLE BUSINESS REVIEW DELIVERABLES

## What a JNL Business Checkup / Operations Review can look like

**SALES | ADMINISTRATION | PRODUCTION**

**ILLUSTRATIVE SAMPLE ONLY - The company, scores, metrics, findings, and action items in this document are fictional and are shown only to demonstrate the format and level of clarity a client may receive.**

## Built for owners who are done guessing.

A JNL review is designed to separate symptoms from root causes, establish a practical baseline, and prioritize what should happen next.

| 1. FINDINGS | 2. MEASUREMENT | 3. ROADMAP |
|---|---|---|
| What is actually happening | Where the business stands | What to fix first |

**Building systems so your business can run - and you can live.**

# 1. Executive Summary & Top Findings

**Sample Company: Mid-Atlantic Trade & Service Contractor | Approx. $2.1M Revenue | 18 Employees | 3 Field Crews**

**Overall operating maturity: 2.6 / 5.0 - The business has repeatable pieces in place, but key systems remain inconsistent, owner-dependent, or disconnected across departments.**

## Three-Pillar Snapshot

| Sales | Administration | Production |
|---|---|---|
| 3.0 / 5 | 2.2 / 5 | 2.5 / 5 |

## Top 5 Findings

**1. Estimated margin is not carrying through to completed jobs.**
Recent sample jobs were sold near a 47% gross-profit target but finished closer to 39%, pointing to estimating assumptions, field productivity, and change-order capture.

**2. Cash is being slowed by billing and collections.**
Average receivable age is approximately 51 days and progress billing is inconsistent on larger projects.

**3. Sales information is not reliable enough to forecast.**
Leads are entering through multiple channels, but stage definitions and follow-up discipline are inconsistent, making close rate and backlog visibility unreliable.

**4. The owner remains the operating bottleneck.**
Scheduling changes, pricing exceptions, purchasing decisions, and customer escalations still route back through ownership.

**5. Production results are not feeding the next estimate.**
Actual labor hours, material variance, rework, and closeout data are not consistently reviewed before similar work is priced again.

## What This Means

The company does not have one isolated problem. The largest drag is the handoff between pricing, administration, and field production. The 90-day priority is to create a reliable feedback loop: sell with current assumptions, capture actual results, review them quickly, and use those results to make the next decision.

# 2. Maturity & KPI Snapshot

0 = not present | 1 = ad hoc | 2 = basic/inconsistent | 3 = defined/repeatable | 4 = managed/KPI-driven | 5 = optimized/scalable

| Domain | Score | Sample Observation | Priority |
|---|---|---|---|
| Strategy / Goals | 3.0 | Goals exist; weekly priorities are not consistently tied to the annual plan. | Medium |
| Budget & Financials | 2.0 | Reports exist, but timing and operating interpretation are inconsistent. | High |
| Job Costing | 2.0 | Some cost data is captured; closeout and variance review are inconsistent. | High |
| Sales / CRM | 3.0 | Pipeline exists but stage discipline and reporting need tightening. | Medium |
| Estimating / Pricing | 2.5 | GP targets exist; production assumptions need stronger feedback from actuals. | High |
| Administration / Workflow | 2.5 | Core tasks are handled, but handoffs depend on individuals. | High |
| Production / Scheduling | 2.5 | Schedule is functional but reactive and capacity visibility is limited. | High |
| Quality / Closeout | 3.0 | Quality is generally good; rework and closeout data are not consistently measured. | Medium |
| Data / Reporting | 2.0 | Multiple spreadsheets/systems create delayed or conflicting numbers. | High |
| People / Organization | 2.5 | Roles exist, but decision rights and accountability are not fully defined. | High |

## KPI Baseline -> 90-Day Target

| Metric | Current | 90-Day Target | Why It Matters |
|---|---|---|---|
| Gross Profit % | 39% | 45%+ | Protect margin and validate estimating assumptions |
| AR Days | 51 | <= 35 | Improve billing cadence and collections |
| On-Time Completion | 72% | >= 90% | Improve schedule reliability |
| Rework % of Revenue | 4.1% | < 2% | Reduce callbacks and margin leakage |
| Bid-Hit Ratio | 24% | 30-35% | Improve qualification and pricing discipline |
| Job-Cost Closeout | 14 days | <= 3 days | Get actual results back into pricing quickly |

# 3. Sample 30 / 60 / 90-Day Action Plan

The final plan is prioritized so the owner is not handed 40 ideas at once. Each action has an owner and a measurable definition of done.

| Horizon | Priority Action | Owner | Success Measure |
|---|---|---|---|
| 30 Days | Standardize job-cost codes and require time/material capture on all active jobs. | Admin Lead / PM | 100% of active jobs use agreed cost structure |
| 30 Days | Set GP floors and update estimating assumptions using recent actual production. | Owner / Estimator | New bids use current labor, burden, materials, and GP floor |
| 30 Days | Create weekly AR review and progress-billing cadence. | Admin Lead | AR days trending toward <=35 |
| 60 Days | Define CRM stages, required fields, and weekly pipeline review. | Sales Lead | 100% of open opportunities have owner, stage, value, and next action |
| 60 Days | Build a 4-6 week capacity look-ahead tied to crews and backlog. | Ops Lead | Weekly schedule review shows capacity gaps before they become emergencies |
| 60 Days | Install a weekly Sales / Administration / Production accountability rhythm. | Owner + Leads | Three-pillar scorecard reviewed weekly |
| 90 Days | Create job-closeout feedback loop from actual hours/materials/rework back to estimating. | PM / Estimator | Completed jobs reviewed within 3 days of closeout |
| 90 Days | Publish a simple owner KPI dashboard with one source of truth. | Owner / Admin | GP, AR, pipeline, backlog, productivity, and rework visible weekly |
| 90 Days | Clarify decision rights so routine approvals stop routing through the owner. | Owner / Managers | Defined thresholds for pricing, purchasing, scheduling, and customer escalations |

**What the client walks away with: clear findings, measurable priorities, and a practical sequence for what should happen first. The exact depth and deliverables depend on the selected JNL review level.**

**This document is an illustrative sample. No real client data is shown.**

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