Implementation Plan & Findings

Summary

Don't be too fluffy in your summary statement. Stick to the core reason you performed the audit, identify your current state, and put a few lines in about your future state.

Core Goals

Outline the core goals you seek to solve with this project; Ideally, S.M.A.R.T. goals.

Challenges

Document the core challenges preventing you from accomplishing your goals. Make sure you address them head-on in your prioritized list of recommendations (below)

Prioritized List of Recommendations

This prioritized list aims to get you a centralized place to review all your key takeaways from your audit. Share this with your senior leadership members and chart a path forward with them before presenting to a broader team.

Priority	**Task**	**Impact**
High	Task Name: One Line Summary	Low
Medium		Medium
Low		High

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Appendix I: Finance Review

The Finance Review should encompass an analysis of budgeting, accounts receivables, accounts payable, profit & loss, and your balance sheet.

Appendix II: Core Offering Review

The core offering review should be a breakdown of how your main product or service is built. Include a step-by-step breakdown along with observations from your interviews.

Appendix III: Sales & Marketing Review

Your sales and marketing review should focus on consistency and alignment. Remember: "template scope + template process + template deliverables = scale." – make sure your messaging and sales support this process so you are not selling snowflakes.

Appendix IV: Team Observations & Opportunities

In this section, yes, you are looking for ways to improve team communications and workflow, but you also need to know who could be positioned into one of those win-win opportunity positions. *Create careers, not jobs.*

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