GROUND TO OAK | BUSINESS SOLUTIONS

Business Clarity Action Brief

A concise, client-ready summary of the challenge, insights, recommendations, and next steps.

CLIENT / ORGANIZATION: _____	**PREPARED BY: Trey Germano / Ground to Oak**

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1. Executive Summary

Complete after analysis. Keep this section concise and client-friendly.

Core challenge	What the client is trying to solve, in plain language. _____
Desired outcome	What needs to be different when this work succeeds. _____
Key takeaway	The most important insight or decision. _____
Recommended direction	The proposed path forward and why it fits. _____

2. Current Situation & Findings

Current state	Relevant context, current process, resources, and constraints. _____
Evidence / observations	Facts supplied by the client; distinguish these from assumptions. _____
Root causes / friction	Likely causes, bottlenecks, gaps, or unresolved decisions. _____
Assumptions to validate	What remains uncertain and how it could be checked. _____

3. Prioritized Recommendations

Priority	Recommendation	Rationale / impact	Effort
1	[Recommendation]	[Expected benefit]	[Low / Med / High]
2	[Recommendation]	[Expected benefit]	[Low / Med / High]

3	[Recommendation]	[Expected benefit]	[Low / Med / High]

4. Immediate Action Plan

Action	Owner	Due date	Success evidence
[Enter details]	[Enter details]	[Enter details]	[Enter details]
[Enter details]	[Enter details]	[Enter details]	[Enter details]
[Enter details]	[Enter details]	[Enter details]	[Enter details]
[Enter details]	[Enter details]	[Enter details]	[Enter details]

5. Measures of Success & Follow-up

Success measures	How progress or impact will be evaluated. _____
Dependencies / risks	Resources, approvals, or external factors that may affect progress. _____
Suggested follow-up	Recommended check-in, next engagement, or decision point. _____

Scope note: This Action Brief is based on information available during the engagement. Recommendations are advisory; the client remains responsible for decisions, implementation, and results.