GROUND TO OAK | BUSINESS SOLUTIONS

Consultant Business Operations Review

Assess your offers, client journey, systems, capacity, and near-term business priorities.

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

TEMPLATE ID: GTO-KIT-05 | VERSION: 1.0 | DATE: _____

1. Business Snapshot

Business model	Core offers, target clients, delivery model, and pricing. _____
Current goals	Revenue, capacity, growth, or operating goals for the next 90 days. _____
Capacity	Available hours, delivery constraints, and key dependencies. _____
Current bottleneck	The most significant constraint limiting progress. _____

2. Offer & Client Journey Review

Offer / stage	What works	Friction / gap	Potential improvement
[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]

3. Operating Systems Review

☐ Lead capture and follow-up

☐ Proposal and scope approval

☐ Contracts and client onboarding

☐ Scheduling and communication

☐ Project planning and delivery

☐ Quality assurance and client feedback

☐ Invoicing, expense tracking, and tax records

☐ File organization, backup, and access security

☐ Documentation and repeatable templates

☐ Referral and retention process

Most manual / repetitive work	What takes time without adding much value? _____
Risk / dependency	Where does work depend on one person, one device, or informal knowledge? _____
Automation candidates	Low-risk repetitive steps suitable for automation, with human review. _____

4. Financial & Capacity Review

Measure	Current	Target	Notes / source
Monthly revenue	[Enter]	[Enter]	[Enter]
Lead-to-client conversion	[Enter]	[Enter]	[Enter]
Average engagement value	[Enter]	[Enter]	[Enter]
Hours per engagement	[Enter]	[Enter]	[Enter]
Effective revenue per hour	[Enter]	[Enter]	[Enter]
Monthly operating expenses	[Enter]	[Enter]	[Enter]
Available delivery capacity	[Enter]	[Enter]	[Enter]

5. 30-Day Improvement Plan

Priority	Action	Owner	Due date	Success measure
[Complete]	[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]	[Complete]
[Complete]	[Complete]	[Complete]	[Complete]	[Complete]

Use this review as an internal planning tool, not as accounting, tax, legal, or investment advice. Verify financial data and consult qualified professionals where needed.