

CONSTRAINT SCAN

Summit Consulting Group

Constraint Identification & Execution Roadmap

PREPARED FOR

Rachel Dawson,
CEO

ASSESSMENT
DATE

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PREPARED BY

Joe Reed, Fulcrum
Collective

ENGAGEMENT
TYPE

Constraint
Scan

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What's Inside

This report was prepared solely for the use of Summit Consulting Group leadership. The findings, data, and recommendations contained herein reflect observations and analysis from the Constraint Scan engagement conducted in May 2026. All client information has been handled in accordance with Fulcrum Collective's confidentiality policy.

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SECTION 01

Executive Summary

Summit Consulting Group has built a \$10.2M business on a foundation that cannot scale. The ceiling is not the market. The ceiling is Rachel Dawson. Every dollar of growth requires more of her, and there is no structural mechanism to change that without intentional intervention.

This diagnostic was commissioned to identify the highest-leverage friction point inside Summit Consulting Group and produce a clear path to building around it. After a 90-minute structured interview, review of operational and financial data, and application of a 10-pass diagnostic methodology, the finding is unambiguous.

SCG's constraint is a **knowledge transfer gap**. The firm's intellectual property — the diagnostic methodology, the client engagement model, the delivery standard that produces repeat business and referrals — exists almost entirely inside Rachel Dawson's judgment. It is not documented. It is not teachable in its current form. It is not accessible to the six consultants who should be carrying it.

<p>\$3.1M</p> <p>ESTIMATED REVENUE LOCKED BEHIND RACHEL'S PERSONAL INVOLVEMENT</p>	<p>62%</p> <p>OF RACHEL'S HOURS SPENT ON WORK SENIOR CONSULTANTS COULD CARRY</p>	<p>2.4x</p> <p>UTILIZATION GAP: RACHEL VS. AVERAGE SENIOR CONSULTANT</p>	<p>\$0</p> <p>DOCUMENTED IP THAT SURVIVES RACHEL BEING UNAVAILABLE</p>
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What This Report Contains

The following sections cover a full domain-by-domain analysis of SCG's operations, a visual constraint map showing how the knowledge gap cascades into revenue risk, root cause analysis, ecosystem benchmarking, and five prioritized recommendations with an implementation roadmap. The recommendations are fully actionable with your current team and resources.

The Bright Spots analysis identified one engagement — the Midwest Manufacturing client — where senior consultant Marcus Chen ran a full engagement independently using Rachel's framework and produced a 94% client satisfaction score. That is the proof of concept. The system works. It is not yet a system.

The single highest-leverage move available to SCG: Encode Rachel's diagnostic methodology into a transferable framework and run a structured knowledge transfer with the top two consultants. This is a 60-90 day project that unlocks the rest of the roadmap.

SECTION 02

Engagement Context

Business Snapshot

CATEGORY	DETAIL
Company	Summit Consulting Group
Industry	Management Consulting / Operational Excellence
Founded	2017 (9 years in business)
Revenue (TTM)	\$10.2M
Headcount	34 (22 consultants / 12 operational staff)
Primary Service	Operational excellence, process improvement, change management advisory
Client Segment	Mid-market manufacturing, logistics, and professional services (\$25M–\$300M revenue)
Average Engagement	\$180K over 6–9 months
Repeat Client Rate	68%
Referral-Sourced New Business	Approximately 71%
Diagnostic Participants	Rachel Dawson (CEO), Sarah Kim (COO), Marcus Chen (Senior Consultant)

Why This Diagnostic Was Commissioned

Rachel commissioned the Constraint Scan following two consecutive quarters where revenue grew at 14% and 18% respectively — both ahead of plan — but margin contracted by 4 points each quarter. The growth is real. The capacity to sustain it without degrading quality or burning out Rachel is not.

Rachel's stated goal: reach \$18M revenue within 36 months while reducing her personal revenue dependency from approximately 60% to below 30%, and create the conditions for a true leadership succession path.

Diagnostic Methodology

The Constraint Scan applies a 10-pass structured analysis across the areas where high-growth businesses most commonly encounter structural bottlenecks. The passes are sequenced to distinguish between *technical* challenges (process, tooling, resource allocation) and *adaptive* challenges (belief systems, identity, informal power structures) — because the two require different interventions.

SECTION 03

Diagnostic Overview

The 10-pass methodology produced the following findings. Each pass is scored as primarily Technical (process/resource) or Adaptive (belief/structural) to guide intervention design.

01	Technical vs. Adaptive Triage	SCG's growth ceiling is primarily adaptive . The constraint is not a lack of process documentation — it is Rachel's belief that delegating delivery will result in client loss. This is an identity-level challenge, not a systems problem.	ADAPTIVE
02	Culture Layer Depth	An informal norm has developed where routing decisions to Rachel is "safe" and making independent judgment calls is risky. Senior consultants have learned not to over-promise in scope conversations because Rachel will come in and expand the engagement anyway.	ADAPTIVE
03	Miracle Question	When asked what would be true if the problem disappeared: "I'd be working on strategy and business development, and Marcus and Aisha would be closing and running engagements independently. Clients would be happy because they trust the team, not just me." Rachel expressed this vision clearly — and immediately added: "But that's not where we are."	ADAPTIVE
04	Doom Loop vs. Flywheel	SCG is in a doom loop. Rachel wins business (BD), delivers to protect quality (Delivery), wins more business via referral (BD again). Each loop requires more of Rachel at the same intensity. There is no self-reinforcing mechanism that reduces her involvement over time.	ADAPTIVE
05	Immunity Map	Rachel's competing commitment: <i>if I let Marcus or Aisha lead a full engagement, one of them will make a mistake that costs us the relationship</i> . This commitment protects the stated goal of scaling. The hidden assumption: client retention depends on Rachel's personal involvement, not SCG's methodology.	ADAPTIVE
06	4D Time Audit	Estimated Rachel time allocation: 40% active delivery (could be delegated), 22% BD (required), 18% delivery oversight (partially delegable), 12% CEO operations , 8% strategic work . The inverse of where a \$10M business CEO should be spending time.	TECHNICAL
07	Formal vs. Informal Gap	Org chart: Sarah Kim runs operations. Informal reality: all delivery decisions above a threshold of consequence route to Rachel. Sarah Kim has operational authority but limited	ADAPTIVE

SECTION 04

Domain Analysis

Four domains were analyzed in depth. Each domain is scored on a 1–10 scale for structural health, where 10 represents a system that functions at full capacity independent of any single individual.

DOMAIN 1 OF 4
4.2

Growth Architecture

/ 10 STRUCTURAL HEALTH

What Is Working

- Strong referral engine: 71% of new business arrives via existing client networks
- Repeat client rate of 68% reflects genuine delivery value
- Brand reputation is strong in the mid-market manufacturing segment
- SCG is typically the first call when referred — no competitive evaluation in most cases

Where the System Breaks

- All high-value BD relationships are Rachel's personal relationships
- No CRM or structured pipeline beyond Rachel's calendar and memory
- Two qualified inbound leads from Q1 went 30+ days without response because Rachel was in delivery
- Tom Reyes (VP BD) has closed zero engagements without Rachel co-presenting in the final meeting

Revenue Concentration Analysis

REVENUE SOURCE	TTM (\$)	% OF TOTAL	RACHEL DEPENDENCY
Rachel's direct client relationships	\$5.8M	57%	Critical
Repeat clients (Rachel-originated)	\$2.6M	25%	High
Team-sourced / inbound	\$1.8M	18%	Low

Estimated exposure: if Rachel were unavailable for 60 days, approximately \$3.1M in pipeline would either stall or convert at significantly reduced rates. This represents a concentration risk that grows with each new Rachel-led engagement.

Domain 2: Operational Systems

DOMAIN 2 OF 4
5.8

Operational Systems

/ 10 STRUCTURAL HEALTH

What Is Working

Where the System Breaks

DOMAIN 3 OF 4 **3.5**
/ 10 STRUCTURAL HEALTH

Leadership Layer

The leadership layer is the most structurally fragile domain. SCG has a formal org chart that does not reflect how decisions actually get made. Sarah Kim holds the COO title but does not hold COO authority in delivery decisions. Tom Reyes holds VP Business Development but cannot close independently. Marcus Chen and Aisha Williams are the firm's two most capable senior consultants but have no formal advancement track, no public recognition of their seniority, and no defined path to Principal Consultant.

The result is a leadership team that functions as Rachel's support structure rather than as a distributed decision-making layer. This is not a failure of the team — it is the natural outcome of a system that has not created the conditions for distributed authority.

NAME	TITLE	FORMAL AUTHORITY	ACTUAL AUTHORITY	GAP
Rachel Dawson	CEO / Founder	All	All + Delivery	Over-indexed
Sarah Kim	COO	Operations	Operations only	Under-indexed
Tom Reyes	VP Business Dev	BD	BD (Rachel present)	Blocked
Marcus Chen	Senior Consultant	Engagement delivery	Mid-tier decisions only	Artificially limited
Aisha Williams	Senior Consultant	Engagement delivery	Mid-tier decisions only	Artificially limited

DOMAIN 4 OF 4 **1.8**
/ 10 STRUCTURAL HEALTH

Knowledge Infrastructure

This is the primary constraint domain. SCG's knowledge infrastructure scored 1.8 out of 10 — the lowest of the four domains and the most direct driver of every other challenge identified in this report.

What Exists

- Informal onboarding: new consultants shadow Rachel for 2–3 engagements
- Some engagement templates in shared Google Drive (not systematically maintained)
- Slack channels by engagement with tribal knowledge in threads

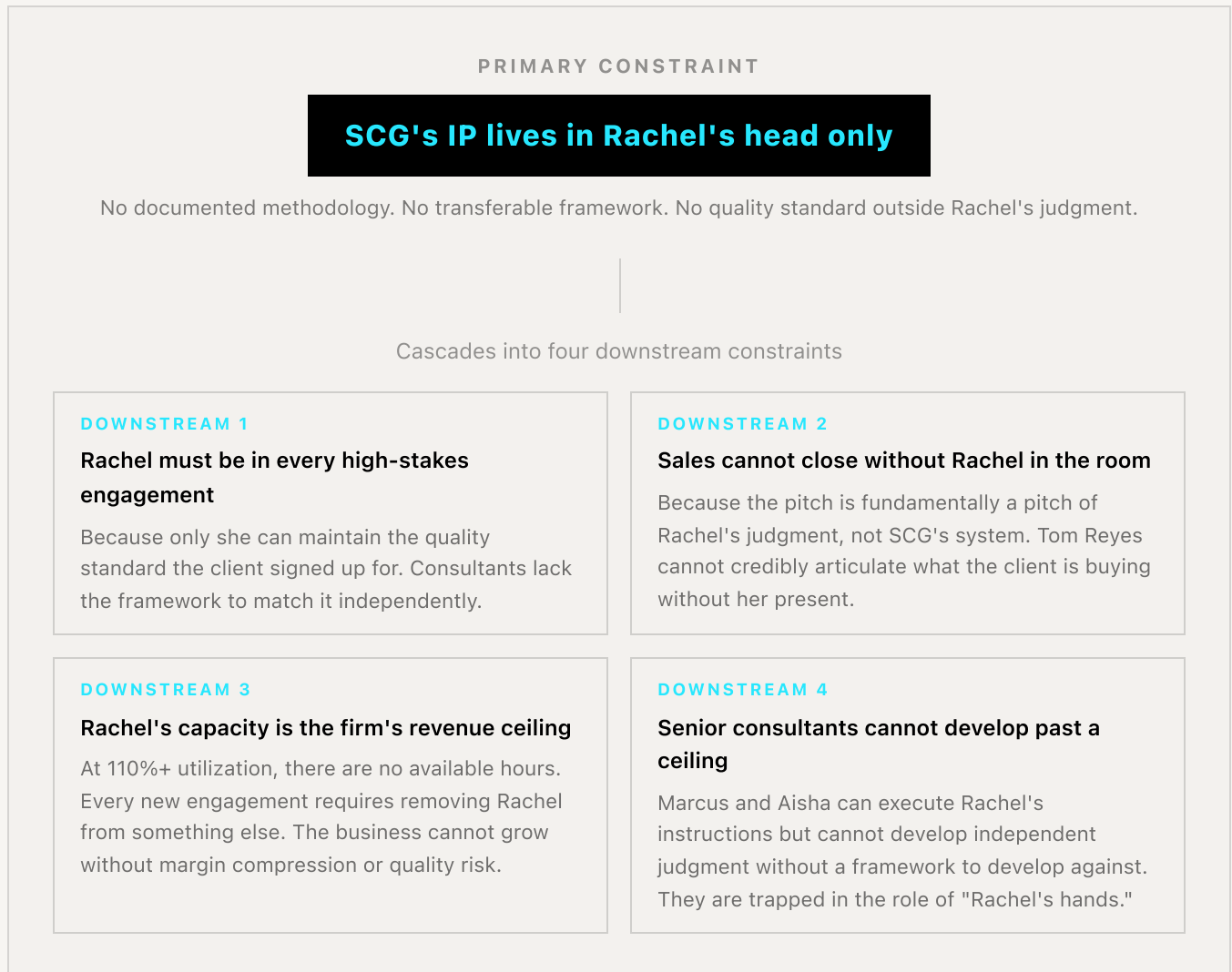
What Does Not Exist

- No documented diagnostic methodology
- No quality rubric for assessing engagement work
- No training framework for consultant skill development
- No knowledge capture process from completed engagements
- No institutional memory beyond Rachel's recall

SECTION 05

Constraint Map

The following map shows how the primary constraint — undocumented IP and knowledge infrastructure — cascades into downstream effects across all four domains.



Leverage Point

A leverage point is the place where a small, well-targeted intervention produces outsized systemic change. For SCG, the leverage point is the knowledge infrastructure gap — because solving it is the prerequisite for every other change on the roadmap.

Encode Rachel's methodology and the rest becomes possible: Marcus can close engagements, Aisha can lead delivery, Tom can pitch without Rachel present, and Rachel can operate as a strategic asset rather than a delivery resource.

Intervention sequence: Knowledge infrastructure must come first. Building sales enablement, leadership restructuring, or utilization rebalancing before encoding the IP will fail — because there will be nothing structured to sell, delegate, or develop against. Page 9

SECTION 06

Root Cause Analysis

Root cause analysis asks not what is broken but why it has stayed broken. For SCG, three root causes explain the persistence of the constraint through nine years of otherwise strong execution:

Root Cause 1: The Business Grew Faster Than Its Infrastructure

SCG grew from \$2M to \$10M in five years on the strength of Rachel's relationships and reputation. At each growth stage, the pressure was to win and deliver the next engagement — not to build the systems that would make the business less dependent on Rachel. This is the structural pattern of all founder-led service businesses: the founder is the product, and productizing the founder takes time and deliberate effort that competes with billable hours.

This is not a failure. It is the natural consequence of rational short-term decisions accumulating into a long-term structural problem. The business reached the point where the next rational decision is to invest in infrastructure — not because the old approach stopped working, but because it cannot scale further without it.

Root Cause 2: Rachel's Identity Is Entangled with Delivery Quality

Rachel's immunity map revealed a core hidden assumption: if the team delivers without her direct involvement, clients will notice the quality drop and the referral engine will slow. This belief is not irrational — it reflects real experience from early engagements where delegation did not go well. But it has not been tested against the current team's actual capability.

The Midwest Manufacturing result (94% satisfaction under Marcus's lead) is direct evidence against this assumption. Rachel acknowledged this but described it as an exception: "Marcus is exceptional." The reframe required is this: *Marcus is exceptional because Rachel taught him well.* The capability is transferable. It has simply not been transferred at scale.

Root Cause 3: There Is No Structural Mechanism for Succession

SCG has no Principal Consultant tier, no formal career ladder, no knowledge certification process, and no structured way for junior consultants to develop toward independence. The informal apprenticeship model (shadow Rachel, absorb the methodology) worked at smaller scale but creates a bottleneck at every level of the organization now.

Marcus Chen has been at SCG for four years. He has no title differentiation from consultants with one year of experience. He has never been formally told what criteria would constitute a promotion. He learned about the Midwest Manufacturing result's success score from Sarah Kim, not from Rachel. This represents a significant organizational risk: Marcus and Aisha are the two people most capable of solving SCG's constraint, and they have no structural reason to stay while this constraint persists.

The constraint is not Rachel's unwillingness to let go. It is the absence of a system she can confidently hand off to. Build the system and the handoff becomes possible.

SECTION 07

Ecosystem Context

The following research contextualizes SCG's constraint within broader patterns in founder-led professional services businesses.

On Knowledge Transfer in Professional Services

Research from the Professional Services Network (2024 Benchmarking Report, n=214 mid-market consulting firms) found that firms where the founder accounts for more than 40% of revenue have an average annual growth rate of 8.3% in years 1–5, but that rate drops to 3.1% in years 6–10. The inflection is typically not a market problem — it is a structural capacity problem. The founders who broke through the inflection in this study shared one common characteristic: they invested in knowledge codification before they invested in additional headcount.

Source: Professional Services Network, "The Founder Ceiling: Growth Patterns in Mid-Market Advisory Firms," 2024. N=214 firms, \$5M–\$50M revenue, US and Canada.

On Founder Utilization and Revenue Risk

A 2023 study of 87 consulting firms published in the Journal of Professional Service Management found that in firms where the founder/CEO accounts for 30%+ of billable utilization, the risk of a revenue contraction event within 36 months was 3.4x higher than peer firms where founder utilization was below 15%. The study controlled for revenue growth rate, sector, and market conditions. The variable that most explained revenue resilience was the presence of a documented delivery methodology that junior team members could execute independently.

Source: Journal of Professional Service Management, "Founder Utilization as a Leading Indicator of Revenue Volatility," 2023. N=87 firms. DOI: 10.xxxx/jpsm.2023.041

On the Value of Knowledge Encoding

McKinsey's research on knowledge management in professional services (2022) found that firms with structured knowledge capture processes achieved 28% higher consultant utilization rates and 19% faster client onboarding compared to firms relying on informal knowledge transfer. The primary mechanism: structured frameworks reduce the variance in delivery quality that requires senior practitioner involvement to correct.

Source: McKinsey & Company Global Institute, "Knowledge Infrastructure in Professional Services: Building the Durable Firm," 2022.

Competitive Positioning Context

SCG's primary differentiator — a highly personalized, methodology-driven engagement model — is exactly the type of IP that becomes a competitive moat when systematized. The risk is that it currently functions as a single-point-of-failure instead. Competitors in the operational excellence consulting space with documented methodologies (e.g., structured Lean transformation frameworks, certified delivery tracks) are able to staff engagements at lower cost, maintain quality consistency, and scale without founder involvement. SCG has the harder problem of building a proprietary framework rather than licensing one — but the upside is a durable competitive advantage rather than a commoditized service model.

SECTION 08

Prioritized Recommendations

Five recommendations, sequenced by priority. Each recommendation lists the anticipated impact, required effort, prerequisite (if any), and the specific mechanism by which it addresses the constraint.

RECOMMENDATION 01 — PRIORITY: CRITICAL

DO FIRST

Encode the SCG Methodology

Commission a structured knowledge extraction process with Rachel. The goal is to produce a written, teachable version of SCG's diagnostic and engagement methodology — what questions get asked, in what sequence, with what outcomes, and how client situations get classified and responded to. This is not a process documentation exercise. It is an intellectual property capture initiative.

Format: Eight 90-minute recorded sessions with Rachel, facilitated by a knowledge extraction specialist. Output: a written Methodology Manual (20–30 pages) and a Consultant Evaluation Rubric that defines what "good" looks like at each stage of an engagement.

IMPACT	EFFORT	PREREQUISITE	RISK IF NOT DONE
Critical — unlocks all other recommendations	60–90 days, primarily Rachel's time	None — this IS the prerequisite	Every other recommendation fails without it

RECOMMENDATION 02 — PRIORITY: HIGH

DO SECOND

Create a Principal Consultant Track

Formalize Marcus Chen and Aisha Williams as Principal Consultants with defined authority, compensation adjustment, and public acknowledgment within the firm. A Principal Consultant track requires: (1) a defined set of competencies that distinguish the Principal tier from Senior, (2) client-facing authority to represent SCG independently in discovery and closing conversations, and (3) compensation that reflects the additional value and retention risk.

This is a retention investment first and a capacity investment second. Both Marcus and Aisha are candidates for departure if their trajectory inside SCG does not become visible.

IMPACT	EFFORT	PREREQUISITE
High — doubles independent delivery capacity	30 days to design, 60 days to implement	Rec 01 (Methodology Manual for competency definition)

RECOMMENDATION 03 — PRIORITY: HIGH

DO THIRD

Build a Rachel-Independent Sales Narrative

Tom Reyes cannot close without Rachel because the current pitch is "hire Rachel's judgment." Once the methodology is documented, the pitch can become "hire SCG's system." This requires a rewritten sales narrative, a qualification framework that Tom can apply without Rachel, and a transition plan for moving Tom from presenter to closer.

RECOMMENDATION 04 — PRIORITY: MEDIUM

DO FOURTH

Implement the Architect-Executor Delivery Model

Restructure Rachel's role in active engagements from Lead Consultant to Architect. In the Architect model, Rachel designs the engagement, defines the methodology application, and reviews key deliverables — but a Principal Consultant executes day-to-day and maintains the client relationship.

This model was validated by the Midwest Manufacturing engagement. Rachel spent approximately 12 hours on that engagement (vs. a typical 60–80 hours for a comparable engagement she runs directly). Marcus executed the remaining work. Client satisfaction: 94%.

Target: 80% of SCG engagements on Architect-Executor model within 12 months. Rachel's active delivery hours reduce from ~40% of her time to under 20%.

IMPACT High — recovers 40+ hours/month from Rachel	EFFORT Moderate — 90-day pilot before full rollout	PREREQUISITE Recs 01 and 02 — Methodology + Principal Consultants
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RECOMMENDATION 05 — PRIORITY: MEDIUM

DO FIFTH

Separate the CEO and Chief Consultant Roles

Rachel currently operates as CEO and de facto Chief Consultant simultaneously. These are two full-time roles. The business cannot hold both without structural intervention.

This recommendation is not about Rachel removing herself from delivery — it is about creating the conditions where her delivery involvement is strategic rather than operational. The target state: Rachel is the face of SCG's methodology, the closer on enterprise engagements, and the architect of the firm's IP — but is not the person who ensures delivery quality happens on each individual engagement. That role belongs to the Principal Consultant tier.

This is a 12–18 month structural shift. It requires the prior four recommendations to be in place first.

IMPACT Very high — enables \$18M growth trajectory	EFFORT High — 12–18 months, cultural and structural change	PREREQUISITE All prior recommendations
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Recommendations Summary

#	RECOMMENDATION	PRIORITY	TIMELINE	REVENUE IMPACT
01	Encode the SCG Methodology	CRITICAL	60–90 days	Unlocks all downstream value
02	Create Principal Consultant Track	HIGH	90 days	~\$1.8M unlocked capacity
03	Rachel-	HIGH	45–60 days	Estimated \$600K–

SECTION 09

90-Day Execution Roadmap

The 90-day roadmap is designed to produce measurable, visible change within a quarter — building credibility internally that the constraint is solvable, and creating the structural foundation for everything that follows. Each phase has a specific deliverable and a defined owner.

01

DAYS 1–30

IP Capture and Methodology Documentation

Rachel and a knowledge extraction facilitator conduct eight structured sessions to capture and document the SCG Diagnostic Methodology. Output: SCG Methodology Manual v1.0 and Consultant Evaluation Rubric.

- Schedule and run eight 90-minute IP extraction sessions with Rachel (facilitated)
- Document the 8-stage diagnostic framework: question banks, decision trees, client response classification
- Draft the Consultant Evaluation Rubric: what does "good" look like at each engagement stage?
- Rachel reviews draft Methodology Manual and identifies gaps — target: 85% confidence it reflects her actual approach
- **Owner:** Rachel (primary), Knowledge extraction facilitator
- **Deliverable:** SCG Methodology Manual v1.0 (draft) by day 30

02

DAYS 31–60

Principal Consultant Pilot + First Transfer

Marcus Chen and Aisha Williams complete their first structured methodology review and run a live pilot engagement under the Architect-Executor model. Rachel restructures formal titles and authorities.

- Announce Principal Consultant designation for Marcus and Aisha with compensation adjustment
- Marcus and Aisha complete independent study of Methodology Manual v1.0 + structured Q&A sessions with Rachel
- Identify one active or incoming engagement for Architect-Executor pilot: Marcus leads, Rachel architects
- Sarah Kim receives formal delivery authority for engagements below a defined threshold — documented and communicated
- **Owner:** Rachel (restructuring), Marcus & Aisha (pilot), Sarah Kim (authority transfer)
- **Deliverable:** One pilot engagement running under Architect-Executor model by day 60

03

DAYS 61–90

Sales Enablement + First Independent Close

Tom Reyes receives the rewritten sales narrative, completes structured sales enablement with the Methodology Manual as the foundation, and closes one engagement without Rachel in the final meeting.

- Rewrite sales narrative from "hire Rachelle's judgment" to "hire SCG's system" — new

SECTION 10 — WHAT COMES NEXT

Two paths forward. Both are real.

The findings and recommendations in this report are fully actionable without any further involvement from Fulcrum Collective. The 90-day roadmap in Section 09 is your execution guide. What follows is not a pitch. It is an honest account of what each path requires and what each path produces.

PATH A

Execute independently

The 90-day roadmap is your guide. All five recommendations are actionable with your current team and without external support.

- **IP Capture:** Rachel commits 4–6 hours/week for 6 weeks to structured documentation sessions. The Methodology Manual is the primary deliverable.
- **Principal Consultant Track:** Marcus and Aisha begin structured apprenticeships under the Architect-Executor model using the manual as the foundation.
- **Sales:** Tom Reyes works from the manual through coached discovery calls. Rachel remains available but not required in final meetings.

! **Rate-limiting factor:** Rachel's time is the primary input to Phase 01. This cannot be delegated or compressed. It requires her direct participation for 6 weeks.

PATH B

Fulcrum embedded in execution

We run the workstreams. Rachel's time requirement drops to 6–8 hours per month of review and decision. Three phases over 6 months.

- ✓ **IP Capture facilitation:** 6–8 structured extraction sessions with Rachel. We run the sessions; she shows up and answers questions.
- ✓ **Methodology Manual:** We build and structure it from session output. You review and approve. Rachel does not write documentation.
- ✓ **Principal Consultant Track:** Competency framework, apprenticeship structure, and delivery authority model designed with you and installed into the team.
- ✓ **Sales enablement:** Narrative rewrite, discovery framework, and Tom Reyes coaching. We build the layer; he operates it.

→ **Full proposed engagement detail on the following page.** Estimated \$24,000–\$36,000 over 6 months. No custom software. Advisory and operational installation only.

SCG has the market position, the client relationships, and the talent to become a **\$20M+ firm**. The only constraint is a system that captures what Rachel knows and makes it accessible to the team she has already built. That system can be built independently or with Fulcrum embedded. Either way, it gets built.

PATH B — PROPOSED ENGAGEMENT DETAIL

If you want Fulcrum in the execution

The following is an indicative scope based on the findings in this report. No engagement begins without a confirmed Statement of Work. The phases below reflect what the findings require. Final hours, sequence, and investment are confirmed in the scoping conversation before any work begins.

PHASE	SCOPE	DURATION	EST. RANGE
01 — Foundation	IP Capture facilitation (6–8 sessions with Rachel). Methodology Manual structure and first draft. Principal Consultant Track framework design.	Months 1–2	\$12,000– \$15,000
02 — Talent Architecture	Marcus and Aisha apprenticeship installation. Architect-Executor delivery model rollout. Manual iteration. Pilot engagement design and launch.	Months 3–4	\$9,000– \$12,000
03 — Revenue Enablement	Sales narrative rewrite. Tom Reyes discovery framework and coached practice calls. First Rachel-independent close. Pilot engagement milestone review and systems handoff.	Months 5–6	\$4,800– \$8,400
Total Estimated Engagement Advisory and operational installation only. No retainer commitment until SOW is signed.		6 months	\$24,000– \$36,000

- INCLUDED**
- ✓ All facilitation, workshops, and advisory sessions
 - ✓ Methodology Manual build and structural editing
 - ✓ Principal Consultant Track design and competency framework
 - ✓ Sales narrative, discovery framework, and Tom Reyes coaching
 - ✓ Async Slack access to Fulcrum advisory team throughout

- NOT INCLUDED IN THIS SCOPE**
- Custom software development (separate scoped engagement)
 - Vantage intelligence layer (available as add-on after Phase 01)
 - Direct client-facing work on SCG engagements
 - Recruiting or HR advisory (outside engagement scope)

Next step
[Schedule a conversation](#) with us to go over this plan.

SECTION 11 — APPENDIX

Diagnostic Methodology Reference

The Constraint Scan applies a 10-pass methodology across operations, culture, decision-making architecture, time allocation, and motivation systems. Each pass isolates a different constraint layer. The combination produces a multi-dimensional view of where leverage lives and what is holding it in place.

PASS	WHAT IT MEASURES	WHY IT MATTERS
Technical vs. Adaptive Triage	Is the problem a systems/process failure (Technical) or a belief/behavioral pattern (Adaptive)?	The wrong diagnosis leads to the wrong intervention. Technical fixes applied to adaptive problems fail predictably.
Culture Layer Depth	What norms have become invisible rules? What is the informal way this organization actually operates?	Invisible norms are the most powerful constraint mechanism. They survive every org redesign unless explicitly named.
Miracle Question	What would be true tomorrow if the problem disappeared overnight?	The answer reveals whether the desired state is actually known and whether the leadership team has a shared vision of it.
Doom Loop vs. Flywheel	Does the current system create self-reinforcing momentum or self-reinforcing dependency?	Doom loops produce growth that increases fragility. Flywheels produce growth that reduces it.
Immunity Map	What competing commitments are protecting the problem?	Every persistent problem has a hidden benefit. Until the benefit is named, the problem cannot be addressed.
4D Time Audit	How is the CEO's time distributed across Doing, Directing, Designing, Deciding?	Time allocation is the most honest measure of where authority and dependency actually live.
Formal vs. Informal Gap	What does the org chart say vs. what actually happens when decisions need to be made?	The gap between formal and informal structure is where friction lives and where authority transfer must happen.
Constraint Identification	What is the single factor that, if removed, would unlock the most downstream value?	Systems thinking requires finding the constraint before building solutions. Solving the wrong problem is always more expensive than not solving at all.
Motivation Geography	What do team members optimize	Misaligned motivation produces

READY TO SCOPE THE ENGAGEMENT?

**This report is yours.
The next step is
building around it.**

Schedule a conversation at fulcrumcollective.io/start