

Business Cockpit Report — fictional example

FICTIONAL DEMONSTRATION ONLY. Northstar Operations Studio, every person/role, source, record, claim and calculation below are synthetic test data. No real company was researched, no customer was interviewed, and no external system was accessed. “Observed” below means inspected inside *inputs-fixture.json*, not verified in the real world. This example shows how the FPF report workflow handles evidence, limits and decisions; it is not a case study or a promise of results.

1. Fictional example — decision snapshot

Perspective: founder's own company. **Version:** demonstration 1.0. **Created:** October 8, 2026. **Evidence freeze:** September 30, 2026 for the lead/project records; October 7 for the synthetic owner intake. **Verification:** local fixture structure/calculations only on October 8. **Depth:** full operating example; independent real-world verification: none.

Northstar's fictional offer is a \$9,000 CRM cleanup and lead follow-up implementation for established B2B service firms. A founder, operations lead and two implementation specialists are the proposed team map. The owner wants reliable delivery and better lead follow-up before buying more traffic. [E-001]

The decision is whether to buy traffic now or first stabilize the work already coming in. The evidence supports **improving current follow-up and delivery first**, then reassessing acquisition with comparable data. This is a proposed operating order, not a measured revenue lift. [F-001, F-002; A-001, A-002]

Three priorities:

1. Give each lead a response owner and a visible unresponded queue. [A-001]
2. Make scope, acceptance and scope-change ownership clear before handoff. [A-002]
3. Review one short weekly decision brief using the current CRM and project board. [A-003]

First useful result: the draft response checklist in section 16. It is written, not installed, sent or piloted.

2. Fictional example — executive findings

Finding	Supported conclusion	Why it matters	Limit and action
F-001: follow-up ownership needs attention	The same synthetic lead cohort contains 120 unique leads; 24 have no response by the freeze. [E-002]	Existing demand may be reaching an unowned queue	This does not prove 24 lost sales. Assign ownership and observe a pilot. [A-001]
F-002: delivery boundaries are unclear	Eight completed projects use 600 delivery hours against 480 planned; three of four current handoffs lack an acceptance checklist. [E-004, E-006]	Planning and quality-control work deserve attention before increasing concurrent work	The checklist sample is only four current projects; it does not prove why completed work took longer. [A-002]
F-003: founder review depends on reconciliation	The owner estimates three hours weekly reconciling CRM/project status, within a broader 12-hour administration estimate. [E-013, E-001]	Better decision input may reduce repeated work	Estimates are owner-reported, not a time study or guaranteed saving. [A-003]

These findings come from different kinds of evidence. Record counts are observed in the fixture. Time estimates are owner-reported within the fictional intake. Priority and expected benefit are inferred/proposed. No third-party endorsement or independent proof was supplied.

3. Fictional example — business, offer and buyer map

Owner → **company**: founder → Northstar Operations Studio. **Offer**: CRM cleanup and follow-up implementation, \$9,000. **Buyer**: established B2B service firm with inconsistent lead handling. **Demand sources**: referral and website in the supplied cohort. **Sale**: inquiry → response → qualification → discovery → proposal → signed work. **Delivery**: deposit → scope handoff → implementation → acceptance → balance. **Retention**: not supplied. [E-001–E-005]

The offer description and current team come from synthetic owner intake, not a market survey. Existing proof, competitive position, churn, repeat purchases and buyer objections remain unknown. A report can still improve a workflow without inventing these answers.

There is one business and one main offer in this example. No results from other customers, offers or businesses are blended into its conversion math.

4. Fictional example — goal, capacity and operating gap

The 90-day owner goal is to deliver current work reliably and improve response before buying traffic. The owner estimates capacity at four concurrent projects. That capacity is not independently established by utilization or staffing records. [E-001]

Current state: a CRM and project board exist; the sales-to-delivery checklist is reportedly inconsistent; the founder approves every scope. Desired state: every inquiry and current project has clear ownership, clear acceptance and a weekly exception review. [E-005–E-007]

A homepage snapshot says projects typically take two weeks, while the owner says four weeks is currently achievable. The difference is a visible promise conflict, not a license to pick a new turnaround. Confirm scope assumptions and recent duration records before changing public copy. [E-011; A-002]

The four service responsibilities describe what a justified change needs: **strategy** sets the rule and priority; **implementation** changes the queue/checklist; **coaching** teaches owners to use it; **maintenance** reviews exceptions. This report proposes those responsibilities. It does not include or certify their delivery.

5. Fictional example — revenue operations

All funnel counts below use the **same 120 unique leads created April 1–June 30, 2026**, with outcomes frozen September 30. The latest eligible lead has at least 92 days of observation. Stage definitions and flags come from the synthetic fixture. [E-002]

Stage	Count	Same-cohort calculation
Unique leads	120	Defined denominator
Responded	96	$96 / 120 = 80\%$
Qualified	60	$60 / 120 = 50\%$ of all leads
Discovery attended	48	$48 / 60 = 80\%$ of qualified leads
Proposal sent	30	$30 / 48 = 62.5\%$ of attended discoveries
Won by freeze	12	$12 / 30 = 40\%$ of proposals; $12 / 120 = 10\%$ of all leads

This is a cohort funnel, not a calculation mixing one month's new leads with another month's wins. Open opportunities and stage histories would be useful in a real review; they are not fully modeled here.

Response groups show a difference: eight wins among 48 under-24-hour responses (**16.7%**) and four among 48 later responses (**8.3%**). The faster group also contains more referrals. This is an association,

not evidence that speed caused the difference or that a response rule will double wins. The 24 unresponded leads must not be assigned a fictional lost-revenue value. [E-002; F-001]

Proposed first change: a named response owner and daily exception queue, using the current CRM. No new tool or paid traffic is required for the draft/pilot. [A-001]

6. Fictional example — delivery and retention

The fixture links all 12 wins to 12 project records. Eight are complete with synthetic acceptance records; four are not complete by the freeze. Deposits and balance receipts are listed separately from acceptance. Payment alone does not prove completed implementation. [E-003, E-004]

The eight completed projects used **600 hours / 480 planned hours = 1.25, or 25% above planned hours**. This is effort variance, not proof of a longer calendar turnaround or lower quality. Actual duration, scope changes and exception causes need separate records. [E-004]

For the four current handoffs, three lack an acceptance checklist and two lack a scope-change owner. These deficiencies overlap; do not add them as five different troubled projects. [E-006]

Proposed correction: agree what the client will accept, who approves scope changes, and when the founder must intervene. Retention, support demand and repeat-business rates stay unknown. [A-002, A-006]

7. Fictional example — operator workflows

Reported workflow: sales owns the CRM; operations owns the project board; the founder approves scope; implementation specialists deliver. The handoff reportedly depends on copying context and asking the founder when the scope is unclear. [E-005]

The report recommends a minimal handoff packet: confirmed scope, input/access needs, acceptance checklist, change owner and next milestone. The first implementation can be a template in the existing project board. Automation should wait until the packet is stable and exceptions are understood. [A-002]

Proposed boundary: operations can advance an agreed handoff; pricing, scope expansion and exceptions outside the agreed rule return to the founder. This is a proposed responsibility matrix, not an accepted assignment. [A-006]

8. Fictional example — founder cockpit

A combined dashboard has not been supplied. The CRM pipeline and project board are available in the fictional inventory, while a weekly decision habit is not documented. That is enough to propose a useful brief, not a decorative control center. [E-007]

The weekly brief needs five items: unresponded leads, next owned follow-ups, delivery exceptions, decisions needed from the founder, and the next review date. Use the existing records. Keep detailed client data in its system rather than copying everything into an AI conversation. [A-003]

A pilot should record whether the brief leads to clear decisions. Founder time saved remains a hypothesis until a comparable time sample exists. [E-013]

9. Fictional example — team and responsibility

The team roles are owner-reported; no person has accepted the report's proposed action ownership. The operations lead is the proposed steward of handoffs and the weekly brief. The founder remains accountable for offer promises, price/scope decisions and access authorization. Sales response ownership needs a named accountable owner rather than a shared inbox with no decision rule. [E-001, E-005]

Before delegating, teach the two exception rules: what can move without founder approval, and what must pause. Review two supervised handoffs and record examples. Coaching is a responsibility to plan, not a completed service in this report. [A-006]

Capacity should be confirmed using actual concurrent work, hours and availability before expanding volume. No hiring recommendation is supported yet.

10. Fictional example — tools, data and AI

Capability	Evidence state	What remains unknown
CRM and project board	Owner reports use; synthetic exports/inventory supplied	Live access, configuration, freshness and actual workflow behavior
Email	Owner reports use	Inquiry receipt, routing and sender ownership
Shared drive	Owner reports use	Permissions, backups and restoration
AI assistant	Owner reports use	Data boundaries and any tested work outcome
Private connectors	No access authorized in this fixture	Every live connection and permission

The recommendation is to improve the current process before buying infrastructure. There is no requirement for a server, multiple AI apps, Obsidian, Graphify, GitHub or Notion to begin this report. Any later connection needs its own approved scope and verified access. [E-008; A-005]

The example contains no real credentials or account identifiers. In a real engagement, collection authority, data isolation and sharing permission would be recorded separately.

11. Fictional example — customer-facing journey

The fixture contains a public-page text snapshot with price and inquiry CTA. There is **no real URL** and no browser, form, email, payment or fulfillment test. A text snapshot proves only the supplied content.

[E-009]

Journey stage	State in this example
Page text supplied	Observed in fixture
Correct live page rendered	Not checked
Inquiry submitted	Not checked / no authorization
Provider accepted inquiry	Not checked
Inbox receipt and accountable follow-up	Not checked
Payment settled and fulfillment usable	Not live-tested; historical synthetic records are separate

Do not describe this route as working end to end. If the owner authorizes a journey test, define the test recipient and permitted actions, verify the separate stages, and retain a receipt. [A-005]

12. Fictional example — proof, positioning and discoverability

The offer is clear enough for this operating review. No independent customer proof, reputation records, SEO/AI-engine checks or reuse permissions were supplied. A testimonial would be **third-party-reported** evidence of the claimed experience, even if its publication were observed. It would not independently prove financial or operational results. [E-012]

The most useful current positioning issue is the conflicting two-week/four-week delivery statement. Resolve the promise using current scope and records before adding authority claims. Search rankings, Knowledge Panels and a content plan are not needed to fix that operating problem. [E-011]

Proposed rule: leave quotes and case-study claims unused until wording, attribution and reuse permission are confirmed. No public endorsement is fabricated for this example. [A-007]

13. Fictional example — business economics

These figures use the same 12 won projects, with cash received through the September 30 freeze. **Contracted value, cash and recognized revenue are different.** [E-003]

Measure	Calculation	Interpretation
Contracted value	$12 \times \$9,000 = \textbf{\$108,000}$	Contract value in this won cohort
Deposit cash	$12 \times \$4,500 = \textbf{\$54,000}$	Synthetic received deposits
Balance cash	$8 \times \$4,500 = \textbf{\$36,000}$	Synthetic received balances
Total cash received	$\$54,000 + \$36,000 = \textbf{\$90,000}$	Not profit or recognized revenue
Completed-project contract value	$8 \times \$9,000 = \textbf{\$72,000}$	Value of the same eight completed projects
Estimated direct labor cost	$600 \text{ hours} \times \text{owner-estimated } \$40 = \textbf{\$24,000}$	Scenario using an unverified loaded rate
Allocated software	\$2,400	Synthetic record for those same eight projects
Estimated direct contribution	$\$72,000 - \$24,000 - \$2,400 = \textbf{\$45,600, or 63.3\%}$	Partial scenario; not net profit or financial certification

The contribution scenario excludes founder sales/admin time, full overhead, taxes, recognition rules and other costs. Monthly fixed overhead is owner-estimated at \$18,000 but cannot be allocated reliably from these inputs. Recognized revenue and company profit remain unknown. Do not subtract that monthly estimate from this mixed-period cohort or annualize the scenario into a forecast. [E-001, E-010, E-014; F-004; A-004]

14. Fictional example — keep, stop, improve and defer

- **Keep:** current CRM/project board, available exports and the existing offer while ownership is clarified. [E-002, E-007]
- **Stop:** calling a route verified without outcome tests, or treating owner estimates as measured savings. [E-008, E-009, E-013]
- **Improve:** response ownership, acceptance/scope-change handoff, and the weekly decision brief. [F-001–F-003]
- **Defer:** new traffic spending, new infrastructure, hiring, public proof reuse and revenue-uplift claims until their prerequisites are answered. [E-001, E-010, E-012]

These are proposed choices for owner review, not changes already made to the company.

15. Fictional example — opportunity shortlist

Order	Opportunity	Benefit hypothesis	Effort assumption / dependency
1	Response owner + exception queue	Fewer inquiries remain unowned	Draft is ready; live pilot needs named owner and permission. Rough setup assumption: 1–2 hours, not a quote
2	Acceptance and change-owner packet	Less ambiguity at handoff	Owner must agree scope/turnaround; rough draft/review assumption: 2–4 hours
3	Weekly decision brief	Less repeated reconciliation and clearer decisions	Requires reliable source owners; rough draft/review assumption: 1 hour plus weekly review

No financial value is assigned to these opportunities. They can affect the same bottleneck, so expected benefits must not be added together as separate guaranteed savings.

16. Fictional example — first seven days and 30-day plan

One useful output completed: draft response checklist. Draft only; not sent, installed or used by a real team.

1. On a new inquiry, record its source, received time and one accountable response owner.
2. Check the unresponded queue once each business day at an owner-approved time.
3. If ownership or next action is missing, assign it within the approved rule; otherwise flag an exception.
4. Record first response time and next follow-up; do not close a lead merely to clear the queue.
5. During weekly review, inspect unresponded and stalled items. Keep the same definitions so the comparison is usable.

The exact response target and review time need owner approval. This checklist does not authorize an assistant to send customer messages. [A-001]

Week one, relative to approved start: approve the response owner and promise, review the four current handoffs, and agree the weekly brief. **By day 30:** inspect a short pilot, document exceptions, and coach two handoffs. Do not compare immature pilot wins to the mature Q2 win rate as if equal. Pilot response ownership/timing is the immediate measure; sales outcomes need sufficient follow-up time. [A-001–A-003, A-006]

17. Fictional example — 90-day milestones and review

The 90-day review should ask whether the approved workflow was used and whether the observed outcomes justify keeping it. Targets remain proposed until the owner accepts them. [A-008]

Review	Measure and acceptance	Comparison limit
Week 1	New pilot leads have a named owner/timestamp; current handoff fields agreed	Process check, not revenue proof
Day 30	Two weekly decision reviews recorded; current/next handoffs use acceptance/change owner	Small operational sample; report exceptions
Day 90	Compare response bands, stage progress and completed-project effort using matching definitions and sufficiently mature cohorts	Channel mix and cohort maturity may differ; no causal claim without a suitable design

If the queue stays unowned, fix responsibility before adding software. If work exceeds capacity, pause expansion and revisit promise/scope. If clean data supports more demand, prepare a separate acquisition experiment with approved spend and a decision rule.

18. Fictional example — decision and implementation packet

Four unresolved decisions:

1. Who accepts ownership of the response queue, and what response target is realistic?
2. Which scope and turnaround promise is supported by recent delivery records?
3. What exceptions can operations handle without founder approval?
4. Is a narrowly scoped live inquiry/backup check authorized, and what data can be shared?

Recommended implementation order: strategy confirms rules; implementation changes the existing queue/handoff template; coaching reviews usage; maintenance owns the weekly exceptions. No implementation project, fee, installation or service contract is agreed by this report.

Draft scope: one lead-response workflow, one handoff checklist, one weekly brief and defined acceptance checks. Exclude paid traffic, platform migration, staffing changes, client outreach automation and revenue promises until separately scoped. [A-001–A-006]

19. Fictional example — action register and evidence ledger

All proposed roles below are fictional and unaccepted. Dates are relative to an approved start, not promises. IDs link to the supplied synthetic fixture.

A-ID / links	Proposed owner and prerequisites	State / target	Observable done check
A-001 / F-001 / E-002, E-005	Sales owner; founder agrees response rule	Checklist drafted; pilot proposed, week 1	Each pilot lead has accountable owner and first-response timestamp; one week of exceptions reviewed
A-002 / F-002 / E-004, E-006, E-011	Operations + founder; scope/promise decision	Proposed, week 1–2	Approved wording and acceptance/change-owner fields in four current projects and next two handoffs
A-003 / F-003 / E-005, E-007, E-013	Operations lead; source owners confirm inputs	Template proposed, week 1–4	Two reviews record decisions, owners and next review dates
A-004 / F-004 / E-003, E-004, E-010, E-014	Accountable bookkeeper; authorized finance data	Proposed, blocked on access	Period, recognition and complete cost scope confirmed; estimates remain labeled or replaced
A-005 / F-005 / E-008, E-009	Founder/system owner; separate test authorization	Proposed, no live execution authorized	Separate correct-render, submission, inbox and restoration receipts if permitted
A-006 / F-002, F-003 / E-005, E-006	Founder + operations; approved exception rules	Proposed, by day 30	Accepted responsibility matrix and two reviewed handoffs
A-007 / F-006 / E-012	Founder/rightsholder; consent unknown	Proposed, hold	Approved permission/wording or proof remains unused
A-008 / F-001–F-003 / E-002, E-004, E-007	Founder + operations; agreed start and metric definitions	Proposed, day 30/90	Comparable review with limits and a recorded keep/change/defer decision

E-ID	Synthetic source / claim state	Key limitation
E-001	Owner intake; owner-reported	Estimates, team, offer and goals not independently verified
E-002	Lead rows; observed in fixture	Defined cohort only; no external CRM or causal experiment
E-003	Contracts/receipts; observed in fixture	Historical synthetic rows, not a live checkout test
E-004	Time/acceptance records; observed in fixture	Eight completed records; duration/cause not supplied
E-005	Workflow interview; owner-reported	No observation of team behavior
E-006	Four handoff samples; observed in fixture	Small sample; missing fields overlap
E-007	Dashboard inventory; observed in fixture	Does not prove live data freshness
E-008	Tool inventory; owner-reported	Access, backups and task outcomes untested
E-009	Public-page text snapshot; observed in fixture	No real URL, render, submit or inbox check
E-010	Bookkeeping gaps; unknown	Revenue recognition/full profit cannot be established
E-011	Public snapshot + owner statement; reported conflict	Two-week/four-week promise unresolved
E-012	Proof rights; unknown	No testimonials/results or reuse consent supplied
E-013	Recurring-work interview; owner-reported	Approximate time; not measured savings
E-014	Software expense; observed in fixture	Same completed projects; labor rate remains estimate

F-004: company profit is unknown; a direct-contribution scenario is not profit. **F-005:** tool/route presence does not establish live journey readiness. **F-006:** proof reuse lacks consent. These findings support A-004, A-005 and A-007 respectively.

All sources are synthetic first-party/fixture records; none is independent real-world evidence. Collection permission is fixture-only analysis. Sharing permission is fictional demonstration only. No client files, private connectors or public publication rights were obtained or implied.

20. Fictional example — limitations and acceptance

Relevant operating modules are covered for demonstration, but retention, full profitability, real staffing capacity, exact delivery duration, client rights, account access and live customer outcomes are unknown. No SEO, AI-search, independent reputation or connector check occurred. The evidence is entirely fictional; the example must never be advertised as a verified FPF client result.

Fixture checks performed: 120 unique lead IDs; 96 responses; 60 qualifications; 48 attended discoveries; 30 proposals; 12 wins; project linkage; cash and hour arithmetic. The report uses the same mature cohort for its funnel math and labels cost/time estimates. A report-rendering check is separate; this Markdown does not claim a PDF already exists or passed inspection.

No overall readiness score was generated. No emails were sent, systems changed, payments taken, integrations installed or clients won. The only completed useful work is the written fictional checklist and this evidence-led report example.

Delivery: fictional report plus *inputs-fixture.json*. **First action:** owner review of the response checklist.

Before implementation: answer the four decisions, agree owners and grant only the necessary scope. Any later live result needs its own verification receipt.

FICTIONAL DEMONSTRATION ONLY — all names, roles, records and numbers are synthetic.