

Delivery Plan

Leverage Audit Deliverable 3 of 4

MARGIN SHIFT

Engagement MS-2026-04

Prepared for Whitfield & Associates

Date: March 14, 2026

10 total initiatives

phases: Now (3) / Next (4) / Later (3)

decision gates: 3

NOW -- Weeks 1-6

3 initiatives

Intake form automation

Replace email-based intake with structured forms. Eliminates follow-up rounds and creates clean data for downstream workflows.

Owner: Ops lead | Dependency: None | Gate: Live + 2 weeks stable, no email fallback

QA validation checks

Automated checks before any client-facing output leaves the organization. Catches errors that currently reach manager review.

Owner: Tech lead | Dependency: None | Gate: Zero undetected errors for 14 consecutive days

Document collection portal

Central upload point replaces scattered email threads. Clients upload directly; team sees completion status in real time.

Owner: Ops lead | Dependency: Intake automation | Gate: 80% client adoption within 30 days

Now Phase Gate: All three Now initiatives must meet their individual gates before advancing to Next. Minimum 14-day stability period.

NEXT -- Weeks 7-14

4 initiatives

Billing system integration

Eliminate manual data transfer between practice management and billing systems.

Owner: Finance | Dependency: Doc portal data | Gate: Auto-sync with zero manual edits

Review delegation workflow

Multi-approver routing to remove the single-reviewer bottleneck. Requires policy change.

Owner: Ops | Dependency: Policy change | Gate: Review cycle time reduced meaningfully

Data security compliance

Regulatory deadline in Q3 2026 makes this time-sensitive regardless of internal sequencing.

Owner: Security | Dependency: External | Gate: Audit passed before deadline

Staffing optimization

Align team capacity to workload patterns revealed by the workflow evidence.

Owner: HR + Ops | Dependency: Process data from Now phase | Gate: Model approved by leadership

LATER -- Weeks 15+

3 initiatives

Client self-service portal

Status checks, document access, and messaging. Reduces inbound support volume.

Dependency: Doc portal + Security compliance

Analytics dashboard

Operational metrics visible to leadership in real time. Requires clean data from billing.

Dependency: Billing integration

Advanced API integrations

Connect remaining systems. Platform stability required first.

Dependency: Analytics + Portal