

# Next-Steps Memo

Leverage Audit Deliverable 4 of 4

**MARGIN SHIFT**

Engagement MS-2026-04

Prepared for Whitfield & Associates

Date: March 14, 2026

**To:** Sarah Chen, Managing Partner; David Ortiz, Operations Director  
**From:** Margin Shift, Leverage Audit Team  
**Re:** Recommended next steps following Leverage Audit delivery  
**Date:** March 14, 2026

## Context

The Leverage Audit identified 10 improvement opportunities across 6 workflow lanes. Three initiatives scored highest on the composite impact-to-effort ratio and organizational readiness. This memo outlines three viable execution paths and provides a recommended approach.

All findings reference the Workflow Evidence Map (Deliverable 1) and Opportunity Matrix (Deliverable 2). The Delivery Plan (Deliverable 3) provides the full phased implementation sequence.

## Execution Paths

### Path A: Pilot Opportunity #1 (Recommended)

**Timeline:** 4 weeks | **Risk:** Low | **Team:** Single team, existing staff

Begin with intake form automation. This is the lowest-effort, highest-readiness initiative with no upstream dependencies. Delivers measurable results within one quarter and clears the critical path for Opportunities 2 and 3. Fully reversible if results don't meet expectations.

**Best when:** Team has bandwidth this quarter and wants proof of concept before larger commitment.

### Path B: Extend Discovery by 2 Weeks

**Timeline:** +2 weeks | **Risk:** Medium

Rebaseline with the CFO before committing resources. Useful if there is internal uncertainty about budget allocation or political dynamics that could stall execution.

**Best when:** Leadership alignment is uncertain or competing priorities need to be resolved first.

### Path C: Defer to Next Budget Cycle

**Timeline:** Q3 revisit | **Risk:** High

Accept the current ~\$180K/quarter friction cost and revisit in Q3 2026. The audit deliverables remain valid for 6-9 months. Risk: competitive pressure and the Q3 compliance deadline may force rushed execution later.

**Best when:** Organization is mid-reorganization or facing a constraint that makes execution impractical right now.

## Immediate Action Items

#	Action	Owner	Timeline
1	Assign Ops lead as owner for intake automation + document portal	Leadership	Within 1 week
2	Assign Tech lead as owner for QA automation	Leadership	Within 1 week
3	Schedule kickoff meeting for Now phase initiatives	Ops lead	Within 2 weeks
4	Confirm Q3 compliance timeline with legal/security	Security	Within 2 weeks
5	Brief finance on billing integration scope (Next phase)	Ops lead	Within 30 days