

Opportunity Matrix

Leverage Audit Deliverable 2 of 4

MARGIN SHIFT

Engagement MS-2026-04

Prepared for Whitfield & Associates

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10 opportunities identified

scoring: Value x Readiness / Effort

phases: Now / Next / Later

Ranked Opportunities

#	Opportunity	Value	Effort	Readiness	Score	Phase	Owner
1	Intake form automation	High	Low	High	9.0	Now	Ops
2	QA validation checks	High	Low	High	8.5	Now	Tech
3	Document collection portal	High	Med	High	7.5	Now	Ops
4	Data security compliance	High	Med	High	7.0	Next	Security
5	Billing system integration	High	Med	Low	6.5	Next	Finance
6	Review delegation workflow	Med	Low	Med	6.0	Next	Ops
7	Staffing optimization	Med	Med	Med	5.5	Next	HR
8	Client self-service portal	Med	High	Low	4.0	Later	Product
9	Analytics dashboard	Med	Med	Low	3.5	Later	Tech
10	Advanced API integrations	Low	High	Low	2.0	Later	Tech

Scoring Methodology

Each opportunity is scored on three dimensions: **business value** (revenue impact, time savings, risk reduction), **implementation effort** (complexity, resources, timeline), and **organizational readiness** (team capability, prerequisite completion, change tolerance). The composite score is calculated as $(\text{Value} \times \text{Readiness}) / \text{Effort}$, normalized to a 1-10 scale.

Dependency Map

Opportunity	Depends On	Notes
Document collection portal	Intake automation	Portal needs structured intake data
Analytics dashboard	Billing integration	Requires clean billing data flow
Client self-service portal	Doc portal + Security	Must complete both prerequisites
Advanced API integrations	Analytics + Portal	Platform stability required first
Data security compliance	None (external)	Regulatory deadline: Q3 2026

Recommended Immediate Actions

Begin with intake automation and QA validation checks in parallel. Both are low-effort, high-readiness, and have no upstream dependencies. Sequence the document collection portal immediately after intake automation is stable. These three initiatives form the foundation for all subsequent phases and carry approximately 60% of the total recoverable value.

SAMPLE