SUMMIT SIGNAL DIAGNOSTIC · PLUS

PREPARED BY SUMMIT LABS · LAKELAND, FL

SAMPLE REPORT FOR A FICTIONAL COMPANY

Harborview Mechanical Services

Field Services · 84 employees

Period reviewed: Trailing 180 days - synthetic dispatch, job, invoice, AR, AP, and payroll data

Sample report: fictional company, synthetic data. It shows the shape of a Summit Signal report. It is not a client diagnostic.

SAMPLE REPORT · SYNTHETIC DATA

MAY 5, 2026

METHODOLOGY

How a Summit Signal diagnostic is produced.

Summit Signal reviews the operational data you provide — invoice exports, quote history, customer records, and process documentation — against structured metrics defined per analysis module. Numbers come from calculation and analyst review against your normalized data. They are not generated by AI.

Each finding is then drafted with AI assistance: a Claude-family model produces the narrative, the recommendation, and an owner- friendly explanation, constrained by an output schema and grounded in the metrics from the previous step. The AI never invents numbers; it interprets the reviewed metrics supplied to it.

In a client report, every finding is reviewed and approved by a Summit Labs analyst before the report is generated. Confidence levels are set explicitly. Findings without sufficient evidence are demoted to "areas for review" rather than presented as confirmed issues.

SAMPLE REPORT

This is a sample. Harborview Mechanical Services is a fictional company, and every name, figure and finding in this report comes from synthetic data. It shows what a Summit Signal report contains and how it reads. It is not a client diagnostic, a benchmark, or a statement about any real business.

AI DISCLOSURE

In a client report, AI assistance is used to draft the findings. Customer data is not used to train the underlying models per Anthropic's commercial terms. Specific savings claims are bounded estimates with explicit confidence levels — not guarantees.

EXECUTIVE SUMMARY

What we found.

Plus diagnostic — full module coverage with explicit prioritization doctrine and roadmap sequencing.

TOTAL OPPORTUNITY

$486,000–$742,000 annualized

Estimated range across all approved findings. Confidence varies by finding; see individual finding pages for evidence and bounds.

TOP 5 FINDINGS

01 Quoted labor assumptions trail actual field hours on repeat service work

Recurring service quotes are built on legacy labor assumptions while actual technician hours run 18.6% higher on comparable jobs.

HIGH

$142K

02 Service completion does not trigger same-day invoice readiness

Completed jobs wait a median 5.8 days before invoice-ready status because closeout documents are reviewed in a twice-weekly batch.

HIGH

$106K

03 Vendor terms are shorter than customer collection terms on project work

Project materials are paid on net-15 or immediate terms while customer collections run closer to net-48, creating a recurring cash gap.

HIGH

$118K

04 High-revenue contract accounts consume disproportionate coordinator time

MEDIUM

$86K

Six contract accounts produce 24% of revenue but consume 39% of coordinator touches after callbacks, access issues, and billing questions.

05 Approved jobs wait in a manual dispatch handoff before scheduling

MEDIUM

$66K

Approved work waits a median 3.9 days before scheduling because quote acceptance is not connected to dispatch release.

BUSINESS CONTEXT

Harborview Mechanical Services is a fictional 84-person field-services company used for Summit Signal Plus sample rendering. The synthetic data assumes commercial HVAC, plumbing, and mechanical service work across recurring maintenance contracts, project jobs, and emergency calls. The pattern shown is intentionally realistic for a growing field-services operator: strong demand, uneven quote discipline, delayed billing, tight cash timing, overloaded coordinators, and manual follow-up work that has outgrown informal controls.

ENGAGEMENT SCOPE

What we analyzed.

This diagnostic is scoped to the modules purchased and the exports you provided. Findings connect back to normalized datasets tied to those modules — not to commentary outside that evidence base.

MODULES INCLUDED

- Margin Leak
- Quote-to-Cash
- Working Capital
- Customer Profitability
- Process Friction
- Labor Productivity
- Operational Controls
- Automation Opportunity

EVIDENCE STANDARD

Metrics are computed from your uploaded exports after column mapping and validation. Narrative in this report is AI-assisted, reviewed, and grounded in those metrics — not invented figures.

MARGIN LEAK DETECTION

FINDING 01 / 08

HIGH

Quoted labor assumptions trail actual field hours on repeat service work

Recurring service quotes are built on legacy labor assumptions while actual technician hours run 18.6% higher on comparable jobs.

EVIDENCE

ACTUAL VS QUOTED LABOR

2.85 hrs vs 2.4 hrs

LABOR OVERRUN

18.6%

SYNTHETIC SAMPLE

312 repeat service jobs

ANALYSIS

Across 312 synthetic service jobs, Harborview's repeat customer quote templates still assume 2.4 technician hours for common preventive and corrective work orders. Actual posted time averages 2.85 hours after travel, setup, and closeout. The leak is concentrated in four repeat customer groups where rates were renewed without refreshing labor assumptions.

The revenue is not obviously wrong at invoice level because the same customers pay on time and keep volume steady. The problem is that the quote math has not kept pace with the service model. Every additional half-hour looks like technician utilization, but it is unpaid labor against a fixed price.

ESTIMATED ANNUAL OPPORTUNITY

$94,000–$142,000 annualized

CONFIDENCE

High confidence

RECOMMENDATION

Refresh the labor assumptions in the recurring-service quote matrix and require branch manager approval before renewing any account below the updated labor floor. Start with the four customer groups driving the largest posted-hour variance.

QUOTE-TO-CASH

FINDING 02 / 08

HIGH

Service completion does not trigger same-day invoice readiness

Completed jobs wait a median 5.8 days before invoice-ready status because closeout documents are reviewed in a twice-weekly batch.

EVIDENCE

MEDIAN LAG

5.8 days

JOBS 10+ DAYS DELAYED

71

SYNTHETIC SAMPLE

428 completed service calls

ANALYSIS

The synthetic job ledger shows 428 completed service calls where field completion and invoice readiness are separate workflow events. Median completion-to-invoice-ready lag is 5.8 days, and 71 jobs wait 10 or more days. The bottleneck is not payment behavior. It is document review: photos, materials, and technician notes are manually checked by coordinators on Tuesday and Friday.

This lag delays customer billing, increases disputed details because customers see older work, and makes AR reporting look cleaner than cash reality. Same-day readiness does not require same-day collection, but it starts the payment clock earlier and removes avoidable aging from the process.

ESTIMATED ANNUAL OPPORTUNITY

$68,000–$106,000 annualized

CONFIDENCE

High confidence

RECOMMENDATION

Create a daily invoice-readiness queue keyed off field completion. Auto-pass jobs with complete photos, materials, and notes; send exceptions to coordinators before noon each day. Target 85% invoice-ready within 24 hours.

WORKING CAPITAL CYCLE

FINDING 03 / 08

HIGH

Vendor terms are shorter than customer collection terms on project work

Project materials are paid on net-15 or immediate terms while customer collections run closer to net-48, creating a recurring cash gap.

EVIDENCE

TERMS GAP

31 days

DPO VS DSO

17 days vs 48 days

SYNTHETIC SAMPLE

96 project jobs

ANALYSIS

For synthetic project jobs over the review period, material-intensive work shows DPO of 17 days and DSO of 48 days. The 31-day mismatch matters because project materials are purchased before completion and often invoiced only after final sign-off. Harborview is effectively financing customer work with operating cash even when the jobs are profitable.

The gap is most visible in projects above $25K, where vendor bills arrive before customer invoices are issued. This is not a debt problem yet, but it creates unnecessary credit-line reliance and makes cash feel tight during otherwise healthy booking months.

ESTIMATED ANNUAL OPPORTUNITY

$72,000–$118,000 annualized

CONFIDENCE

Medium confidence

RECOMMENDATION

Negotiate net-30 terms with the top five material vendors and add deposit or progress-billing triggers for projects above $25K. Track working-capital exposure by job before approving schedule release.

CUSTOMER PROFITABILITY

FINDING 04 / 08

MEDIUM

High-revenue contract accounts consume disproportionate coordinator time

Six contract accounts produce 24% of revenue but consume 39% of coordinator touches after callbacks, access issues, and billing questions.

EVIDENCE

REVENUE VS TOUCH SHARE

24% vs 39%

AFFECTED ACCOUNTS

6

SYNTHETIC SAMPLE

1,184 coordinator touches

ANALYSIS

The synthetic account-level view shows six commercial maintenance accounts with strong top-line revenue and weak net contribution after service burden. These accounts generate a high number of nonbillable coordinator touches: reschedules, access-code requests, callback coordination, invoice questions, and service-level exceptions.

The accounts are not necessarily bad customers. The issue is that Harborview prices and staffs them as standard maintenance relationships while operating them like high-touch managed accounts. Without a tier reset, the burden stays hidden in office labor and technician rework.

ESTIMATED ANNUAL OPPORTUNITY

$54,000–$86,000 annualized

CONFIDENCE

Medium confidence

RECOMMENDATION

> Move these accounts into a managed-service tier review. Add explicit response boundaries, billable callback rules, and renewal pricing that reflects nonbillable support load.

PROCESS FRICTION

FINDING 05 / 08

MEDIUM

Approved jobs wait in a manual dispatch handoff before scheduling

Approved work waits a median 3.9 days before scheduling because quote acceptance is not connected to dispatch release.

EVIDENCE

APPROVAL-TO-SCHEDULE LAG

3.9 days

JOBS OVER 7 DAYS

38

SYNTHETIC SAMPLE

241 approved jobs

ANALYSIS

In the synthetic workflow export, 241 approved jobs have a clear quote-accepted timestamp and a later dispatch-scheduled timestamp. The median gap is 3.9 days. Most of the delay sits between sales marking work accepted and operations seeing a complete scheduling package.

The handoff relies on email, a shared spreadsheet, and coordinator memory. That creates duplicate entry and avoidable customer follow-up. It also makes capacity planning worse because operations sees demand later than sales does.

ESTIMATED ANNUAL OPPORTUNITY

$42,000–$66,000 annualized

CONFIDENCE

High confidence

RECOMMENDATION

> Replace the email handoff with an approval-complete trigger that creates a dispatch-ready queue. Require missing scope, materials, or access details to be flagged as exceptions before a job can sit unowned.

LABOR PRODUCTIVITY & UTILIZATION

FINDING 06 / 08

HIGH

Overtime is concentrated in two crews while scheduled capacity remains unused

Two crews carry 46% of overtime hours while three other crews show repeated idle half-days during the same weeks.

EVIDENCE

OVERTIME CONCENTRATION	IDLE HALF-DAYS	SYNTHETIC SAMPLE
46%	29	8 crews over 12 weeks

ANALYSIS

Synthetic time and dispatch data shows that overtime is not evenly linked to overall demand. Crews 2 and 5 carry 46% of overtime hours, largely on emergency and late-day commercial calls. During the same four-week windows, Crews 1, 4, and 7 show 29 idle half-days with no billable work posted.

This pattern points to dispatch balancing and skill-tag visibility, not a simple capacity shortage. Hiring before fixing dispatch rules would add cost while preserving the same bottleneck.

ESTIMATED ANNUAL OPPORTUNITY

$76,000–$124,000 annualized

CONFIDENCE

Medium confidence

RECOMMENDATION

> Add a dispatch load-balance rule that checks crew skill tags, route geography, and same-week overtime before assigning nonemergency work. Review exceptions weekly until the pattern stabilizes.

OPERATIONAL CONTROLS

FINDING 07 / 08

MEDIUM

Credit memos and labor write-downs lack consistent approval evidence

Forty-three synthetic billing adjustments above $500 have inconsistent approval notes, and 19 were entered by the same role that created the invoice.

EVIDENCE

ADJUSTMENT EVIDENCE COVERAGE

44%

SAME-ROLE ENTRIES

19

SYNTHETIC SAMPLE

43 adjustments above $500

ANALYSIS

The synthetic controls review shows that Harborview has grown past informal billing adjustment practices. Credit memos, labor write-downs, and courtesy discounts are usually reasonable in isolation, but the approval evidence is incomplete. For adjustments above $500, only 44% have a clear approver note, reason code, and customer reference.

This is a control weakness and a margin visibility weakness. Leadership cannot distinguish justified customer concessions from avoidable leakage without a consistent evidence trail.

ESTIMATED ANNUAL OPPORTUNITY

$36,000–$58,000 annualized

CONFIDENCE

High confidence

RECOMMENDATION

> Require reason codes and approval notes for billing adjustments above $500. Separate invoice creation from adjustment approval for larger concessions and review exceptions monthly.

AUTOMATION OPPORTUNITY

FINDING 08 / 08

MEDIUM

Recurring AR follow-up and dispatch status updates are still manual

Rule-based AR reminders, statement generation, and dispatch status updates consume an estimated 18.5 staff hours per week.

EVIDENCE

MANUAL ADMIN LOAD

18.5 hrs/week

REPEATABLE WEEKLY EVENTS

137

SYNTHETIC SAMPLE

AR, dispatch, and coordinator tasks

ANALYSIS

The synthetic automation scan identifies three high-fit workflows: first AR reminder emails, weekly statement generation for overdue accounts, and customer status updates when dispatch windows move. Each follows predictable timing and status rules, but staff still check lists, compose messages, and update spreadsheets by hand.

These are good first automation candidates because the rules are stable and exceptions are obvious. Final collection decisions, customer concessions, and dispatch prioritization should remain human-owned.

ESTIMATED ANNUAL OPPORTUNITY

$44,000–$72,000 annualized

CONFIDENCE

Medium confidence

RECOMMENDATION

Automate first reminders, statement packet generation, and dispatch-window status updates with exception queues. Keep manager approval for escalations, concessions, and customer-specific language.

PRIORITIZATION

How we ranked tradeoffs.

Plus engagements cover every Summit Signal module in scope. That breadth can look like a long list unless there is an explicit ranking logic. The sequence below is how Summit Labs prioritized what to fix first — before effort/value scoring on the roadmap that follows.

01 **Dollars and drag**

Findings with the largest quantified impact or cash-cycle effect rise unless there is a clear data-confidence reason to hold them back.

02 **Cross-module corroboration**

Issues that show up across modules (for example margin and quote-to-cash) are treated as structural until proven otherwise.

03 **Confidence and evidence depth**

High-confidence findings outrank speculative ones. Where evidence is thin, we say so — we do not pretend equal certainty to keep the list symmetric.

04 **Implementation realism**

The roadmap that follows translates this order into sequenced actions with explicit effort and value scores so your team can execute without re-debating prioritization from scratch.

ROADMAP

Prioritized actions, sequenced.

Effort and value scored 1–5. Higher value, lower effort actions ladder to the top of each horizon. Use this as a working plan, not a contract — sequence shifts as you learn from the first implementations.

E = Effort **V** = Value

IMMEDIATE

01	Confirm the eight-module Plus finding set with the leadership owner group	E 1	V 3
02	Freeze billing adjustments above $500 without reason code and approver note	E 1	V 4
03	Create a daily invoice-readiness exception queue from completed service jobs	E 2	V 5

30 DAYS

01	Refresh recurring-service labor assumptions and install branch approval below floor	E 3	V 5
02	Negotiate net-30 terms with the top five material vendors	E 2	V 4
03	Replace quote-accepted email handoff with a dispatch-ready queue	E 3	V 5

60–90 DAYS

01	Launch dispatch load-balancing rule using crew skill tags, geography, and overtime	E 4	V 5
02	Add deposit or progress-billing triggers for projects above $25K	E 3	V 4
03	Tier-review the six high-touch contract accounts before renewal	E 3	V 4
04	Automate first AR reminders, weekly statement packets, and dispatch status updates	E 4	V 5

LONGER TERM

01	Install a monthly controls review for adjustments, write-downs, and override trends	E 2	V 4
02	Build a field-services operating scorecard across cash, margin, dispatch, and labor	E 5	V 5

WHERE SUMMIT LABS GOES FROM HERE

Four ways we could continue, if it's a fit.

The diagnostic is the deliverable; the recommendations are yours to take anywhere — your internal team, a different vendor, or back to us. If you want Summit Labs to help build what this report recommends, these are the engagements that fit what it found.

Automation Opportunity Buildout

Design and implement the first AR reminders, weekly statement packets, and dispatch-window customer updates with exception queues and manager-owned escalation points.

WHY IT FITS — Best fit for the automation finding and the quote-to-cash lag because the workflows are rule-based, frequent, and already visible in the synthetic task pattern.

Controls Implementation Sprint

Install approval notes, reason codes, role separation, and a monthly review pack for billing adjustments, labor write-downs, credit memos, and pricing exceptions.

WHY IT FITS — Directly addresses the controls finding while supporting the margin-leak recommendation with narrow governance instead of broad bureaucracy.

Process and Labor Operating Reset

Redesign the quote-accepted dispatch handoff, build the dispatch-ready queue, add crew skill tags, and implement load-balancing rules for overtime and idle-capacity review.

WHY IT FITS — Ties the process-friction and labor-productivity findings together so Harborview removes workflow wait time before making headcount decisions.

Working-Capital Implementation Program

Create vendor negotiation targets, project deposit and progress-billing rules, job-level cash exposure tracking, and a working-capital scorecard for monthly owner review.

WHY IT FITS Fits the working-capital finding because the largest cash benefit comes from implementation discipline after the diagnostic, not another report.

Schedule a scoping call.

Free 30-minute conversation to confirm whether one of the above options fits, or whether a different shape of engagement makes more sense. No pressure. No timeline tricks.

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