

Foundations Strategy Intensive

Three priorities. A working risk list. A 30-day plan.

ILLUSTRATIVE SAMPLE · Fictional commercial electrical subcontractor: 46 employees, six concurrent commercial jobs. Scope: estimating-to-field handoffs and crew readiness. Figures describe a hypothetical assessment, not measured client results.

What the review covers

Scheduling and capacity; handoffs and materials; bottlenecks and flow; leadership tracking; operational risk. These five dimensions are reviewed within the one agreed operating area.

Priority and risk register

01 · Crew readiness

Finding: Crews are dispatched before materials or area releases are confirmed.

Risk priority: $3 \times 5 = 15$ · Illustrative likelihood $\times$ impact, each 1–5.

Mitigation / owner: PM checks a two-week look-ahead with purchasing and the foreman. Hold dispatch when a required item or area is unavailable.

Escalation trigger: Delivery / release missed

02 · Field-to-office updates

Finding: Foremen text progress and blockers; the office reconstructs status after decisions are due.

Risk priority: $3 \times 4 = 12$ · Illustrative likelihood $\times$ impact, each 1–5.

Mitigation / owner: Foreman posts one short update. Coordinator records planned / actual hours and blockers in a shared job view.

Escalation trigger: Update missing by agreed daily cutoff

03 · Change authorization

Finding: Field changes start before written authorization, price, and schedule effects are recorded.

Risk priority: $3 \times 4 = 12$ · Illustrative likelihood $\times$ impact, each 1–5.

Mitigation / owner: PM logs the request, prices and schedules it, and confirms written authority before affected work begins.

Escalation trigger: Requested change has no approved record

Baseline to establish: estimated and actual crew hours by job, material/area readiness at dispatch, time of daily updates, and approved versus open change requests. No before/after result is claimed.

The next 30 days

A plan the owner and team can discuss before committing to implementation.

When	Actions / output	Responsible roles	Measure
Week 1	Review three recent jobs. Map estimating → purchasing → field. Confirm hours and readiness records. Output: Baseline and readiness checklist	Owner + PM	Record available estimate / actual hours, waiting reasons, and missing approvals.
Week 2	Pilot the two-week look-ahead and dispatch readiness check on two active jobs. Output: Live look-ahead with blockers	PM + purchasing + foremen	Track starts that met every agreed readiness item; record causes for each exception.
Week 3	Use the daily update and written change-request routine. Review one weekly job summary. Output: Status view and change log	Foremen + coordinator + PM	Track update timeliness, hours variance, open blockers, and unapproved changes.
Week 4	Compare the pilot with its baseline. Review exceptions with the team. Assign owners for the next 60 days. Output: Review and follow-on priorities	Owner + PM	Report observed changes and data limits. Set next targets using the actual pilot records.

What Foundations delivers

The assessment provides the top three priorities, this prioritized risk list with mitigation actions, and the 30-day plan. Owners and timing are proposed for discussion. Delivery of the assessment does not mean that the plan has already been implemented.

How the follow-on work is handled

Reset: document and put one defined revised process into use during a 30–45-day engagement.

Project Implementation Support: LeanLine runs the plan, tracking, and reporting; your team performs the work. Implementation, dashboard development, site visits, and travel are separately agreed.

Foundations: \$2,500 one-time. Continue into the \$4,000 Reset engagement within 30 days and the full \$2,500 applies, leaving \$1,500. Published base prices cover remote delivery.