



FROM JASON COOK DESIGN

Jason Cook Design prepared this sample report about a fictional client so you can see what a Phase 0 diagnosis delivers. None of its people, numbers or findings belong to a real company.

What Phase 0 is. An examination that takes about a week and asks for two to three hours of your time. It ends in a written report with a recommendation, including a go / no go recommendation.

What it costs. \$2,500. If you go on to the next phase, that amount is credited in full against it.

What stands behind it. You get a list of what the report will contain in writing before I start. If something on the list is missing and I can't fix it, I refund the \$2,500, and you keep the report.

Who it is not for. If you already know exactly what you want built, if you want me to pick a tool for you, or if you can't spare the two to three hours, the money is better spent elsewhere.

Next step. Book a free 20-minute call. I listen first, then send you a summary of how, and whether, I can help.



JASON COOK DESIGN

Engagement Roadmap — Marlow & Quill

A sample first-phase report for a fictional client

PREPARED FOR	Marlow & Quill (fictional agency)
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VERSION	0.1
STATUS	Sample

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A full report also holds three more sections. They are listed here in their place, marked not in this sample, with the pages they would occupy. What drives the design lists 12 to 20 drivers, each with its source and the decision it limits. How we would work together covers your role and ours, the cadence of the next phase and what we need from you. What you own covers what is yours at each point, what you can take to another provider, and how long a quote stays open. Nothing in the findings was held back.

01 Summary

Marlow & Quill cannot take larger deals as it runs today, and the owner's data doesn't explain why

GOVERNING THOUGHT

The agency's growth is limited by the time its owner spends managing, and nothing in its data shows that. Capture the right measures first, then put analytics and AI on top of them.

\$260k

the larger deal, about 3 times the usual project

ILLUSTRATIVE

126%

the owner's management load if the agency took it

ILLUSTRATIVE

about 30

decisions a week that only the owner makes

ILLUSTRATIVE

What we found. The owner asked whether AI could sort this out. The evidence points elsewhere. Headcount grew with each client win, coordination grew faster, and the owner became the place where decisions queue. A deal 3 times the usual size would push the owner to 126% of the hours available for management, and the agency's tools cannot show this coming.

What we recommend. Proceed to the next phase, on two conditions: four weeks of capturing decisions and coordination time before it starts, and a short list of approvals the owner hands off in those weeks. AI comes after that, if the captured data earns it.

What you are not obliged to do. Buy the next phase. The report is yours to take to anyone.

Why this page comes first: a reader who stops here should know what we found, what we recommend and what happens next. Each later page is evidence for one of the three numbers above.

02 What you asked us to look at

You asked whether AI can sort this out, and your real goal is a business that does not depend on you

In your words. “We keep winning work and I’m drowning. I can’t tell which jobs are making money until they’re over, and when a deadline slips I’m guessing who to move. Everyone tells me AI can sort this out.” At the quarterly level, you want help analyzing and planning the numbers. Day to day, you want advice on who to move when a client’s date shifts, and better time tracking, durations included. Someday you picture an assistant that runs operations so you can manage from your phone.

What you already tried. You bought an analytics tool for small businesses. It shows what your data lets it show, and the data is thin. You do not want to assemble more off-the-shelf tools, each with its own per-user subscription. You do not have the capacity to build a system yourself.

What sits under the request. Five whys on your goal ended at the time cost of management. Each hire made the business harder to manage. Today you would turn down the next larger deal, because managing it would break you.

03 What we found

Three findings explain why the agency stalls, and one hypothesis we ruled out

The agency cannot take the larger deal as it runs

Claim. With a \$260,000 project over 22 weeks, the owner's layer reaches 126% of its hours and the creative and technical leads reach 116%.

ILLUSTRATIVE Evidence. The management model in Appendix B.

Confidence. Medium: the model's coefficients are our assumptions, and a 30% error on the owner's demand still leaves the owner over capacity at 112%. **What it means.** The constraint is management capacity. Production capacity is not the limit.

Why findings are written this way: each states a claim, the evidence behind it, how sure we are, and what it means for you. A finding without evidence would not appear here.

The owner is the queue

Claim. About 30 of the 40 to 45 decisions made each week can only be made by the owner, and items wait two to four days. **ILLUSTRATIVE**

Evidence. Appendix A, from your own walk through four weeks of records. **Confidence.** Low to medium: this is your estimate, rounded, and it likely undercounts. **What it means.** Delay compounds as projects overlap, which is why a larger deal strains the owner first.

The data cannot show management cost

Claim. The agency records hours by task and nothing about coordination, rework or waiting. **Evidence.** Appendix C. **Confidence.** High: it is a property of the systems, checked in the tools themselves. **What it means.** The analytics tool you bought can only report what is captured, so more analytics, or AI on top of it, will not show you the cost you are trying to find.

Hypothesis ruled out: not enough demand

We tested whether demand limits growth. It does not. You turned down two inquiries of about this size in the past year. **ILLUSTRATIVE** Capacity to manage, and not demand, stops you.

Your alternatives to hiring

Freelancers cost more per hour than staff and still need managing, so they move the load to the project managers and leads without removing it. A partnership with another agency is slow to arrange under time pressure unless the relationship and the spare capacity already exist, and it also reduces your margin. Neither removes the constraint.

04 Our recommendation

Proceed to the next phase, once four weeks of real measures are in hand

Recommendation. Proceed to Discovery and Architecture, on these conditions:

Condition one. For four weeks before the phase starts, log owner decisions and the time spent on coordination, using a one-page method we supply. This replaces the estimate in this report with a measurement.

Condition two. In the same four weeks, the owner hands off a short list of approvals below a stated threshold, so the capture shows what delegation changes.

What would change this recommendation. If the capture shows the owner makes fewer than half the decisions the estimate suggests, the problem is somewhere else, and we would say so before you spend more.

What the next phase produces. An architecture for capturing management data and using it: what to record, where it lives, how it feeds the analytics you already own, and what would justify AI on top. It is a design and not a build. You are not obliged to buy it, and the \$2,500 for this phase is credited against it if you do.

Why conditions are listed: a recommendation to proceed should say what has to be true first. These conditions are checkable, and each is cheap compared with the phase it protects.

06 Assumptions, unknowns and checks

What we assumed, what is still unknown, and what we checked before recommending anything

Assumptions

The management model assumes 40.5 hours of project time per week for a typical project, and it assumes that the second layer's review load grows with team size. **ILLUSTRATIVE** Both are in Appendix B with a 30% sensitivity.

Why this page exists: the guarantee promises that unknowns are listed with how they will be handled, and that refusal flags were checked. This page is where that is shown.

Unknowns and how they will be handled

Unknown	Handling
How many owner decisions can move to someone else	Measured in the capture period
Whether estimates drift from actuals early in a project	Deferred to the next phase
How much the agency would pay for a better analytics tool	Not needed for the next phase

Checks for ethical or refusal flags

We checked whether the work conflicts with our standards. It does not. The capture records decisions and coordination time for the team, and it is not a measure of any one person. Employee surveillance is out of scope, and we would refuse to design it. No regulated data is in scope.



Appendices

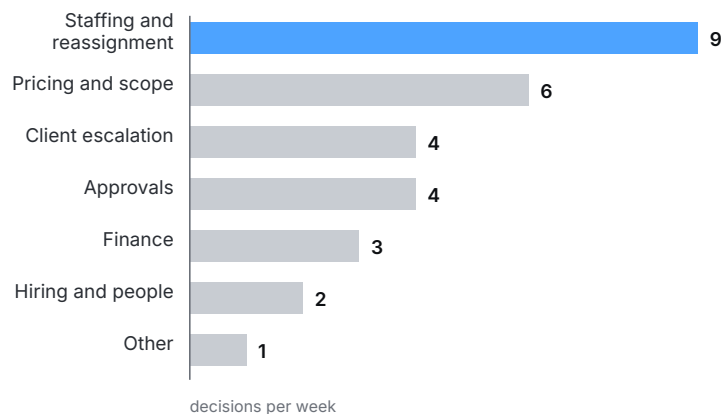
The evidence behind the findings in this report.

Appendix A — Owner decision load

Marlow & Quill’s owner makes about 30 decisions a week that nobody else can

EXHIBIT 1

Owner-only decisions per week, by type



Source: Owner’s estimate from a walk through four weeks of calendar, messages and project-tool history. Figures rounded and invented for this sample [ILLUSTRATIVE](#). Undercounts likely.

Method and limits. An owner of a business like this has no record of decisions made. We asked the owner to walk through four weeks of records and sort what they remember deciding, then estimate how many only they could make. The figures round to whole decisions, and the table gives the ranges. Because the estimate is the owner’s recall, it likely undercounts, and a proper capture is the first condition of our recommendation.

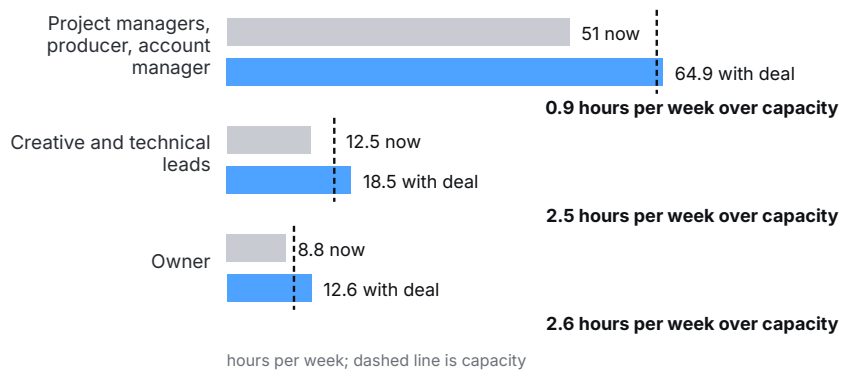
Type	All decisions per week	Only the owner
Staffing and reassignment	10 to 12	8 to 10
Pricing and scope	7	6
Approvals	10	4 to 5
Client escalation	5	4 to 5
Finance	5 to 6	3 to 4
Hiring and people	2 to 3	2 to 3
Other	2 to 3	1

Appendix B — The larger-deal model

A deal one size up would push the owner and the leads past the hours available

EXHIBIT 2

Management hours per week, now and with a \$260k deal, against capacity



Source: Management model with invented coefficients and a hypothetical \$260,000, 22-week deal **ILLUSTRATIVE**. Two additional hires assumed.

The assumptions. The first layer's demand per project is 2.0 hours fixed, plus 0.15 hours for each pair of team members, 0.5 for each client stakeholder and 1.0 for each workstream. **ILLUSTRATIVE** The number of pairs among n people is $n(n-1)/2$, so a team of 9 has 36 pairs where a team of 4 has 6. The coefficients are our assumptions. At 30% lower demand on the owner's layer, the owner still reaches 112%.

What it shows. The deal alone takes the owner to 120%. The first layer holds only if two hires arrive first. The gap on the owner's layer is about 2.6 hours a week, roughly nine more decisions that only the owner can make.

Appendix C — What the data captures

The agency measures results after the fact and records almost nothing that predicts them

Measure	Where it lives	Captured
Hours by task	Timesheets	Yes, without start and stop
Project margin	Accounting export	Yes, after the project
Pipeline by month	CRM	Yes
Estimate against actual by project	Estimate spreadsheet and timesheets	Partly: not linked
Scope change without a change order	Email	No
Reassignments and why	The owner's memory	No
Time between a date shift and a staffing decision	Nowhere	No
Coordination, rework and waiting time	Not a category	No

What this explains. The analytics tool reports margin and utilization well. It cannot report what drives them, because those measures are not captured. The realized rate is \$143 an hour against a \$155 rate card. **ILLUSTRATIVE** That 8% gap may be scope leakage, but we are not sure, and it is the kind of question a better capture would answer.

One outside reference. Across professional services firms, billable utilization averaged 66.4% in 2025.¹ **OBSERVED** The agency's billable staff run at about 68%, so its utilization is ordinary. **ILLUSTRATIVE** That is why utilization will not explain the strain, and why the measures above matter more.

¹SPI Research, Professional Services Maturity Benchmark, as reported in a Deltek article published 2026-10-22 and accessed 2026-10-29. Covers professional services broadly and not agencies. The primary report was not opened for this sample.

Appendix D — How we reached the findings

We asked four questions of the owner, and the gap between the answers is the finding

Round one: the goal. We asked what the business is for, five times. Grow revenue. So the agency can take bigger projects. So margins and work are steadier. So the owner stops worrying about next quarter. So the team they built stays together and the evenings are theirs. The last answer is the goal.

Round two: what is in the way. The owner named the number of clients and the quality of the work as fine. They named managing the business at its current size as the obstacle.

Round three: measuring progress without dollars. We asked how they would know they were closer, without using money. They named two things: projects that ship on the date promised, and how many people could run a project without them. The agency tracks neither.

Round four: the magic wand. Asked what they would fix if they could fix one thing, the owner chose an assistant that tells them who to move when a date slips. That is a tool for the symptom. The two measures from round three are the leading indicators of the cause.

Why this appendix is here: it shows how the questions separate what the owner says from what the owner cannot see. The gap between rounds three and four is where the reframe in section 3 comes from.

Appendix E — Done-criteria checklist

Every item promised in the written list is in this report, and this page shows where

What the guarantee covers	Where it is met
Your objective, in your terms	What you asked us to look at
A summary you can act on alone	Summary
A recommendation with its reason	Our recommendation
Every finding linked to its evidence	What we found, with Appendices A, B and C
Remaining unknowns, with how they are handled	Assumptions, unknowns and checks
A first move	Our recommendation
Refusal and ethical flags reported as checked	Assumptions, unknowns and checks