

SAMPLE AUDIT / FICTIONAL DATA

# Agency Scope-Leak Audit

Northline Studio | Prepared by HoldClear | Example deliverable

**Purpose**

Show where unplanned client work becomes invisible, quantify the sample delivery cost, and propose a repeatable include / swap / quote / decline decision path.

|                     |                  |                      |                      |
|---------------------|------------------|----------------------|----------------------|
| \$4,390             | 58.5 h           | 7                    | 1                    |
| SAMPLE MONTHLY LEAK | UNPROTECTED TIME | REPEAT REQUEST TYPES | NAMED DECISION OWNER |

## Executive finding

Northline does not have a pricing problem first. It has a classification problem. Slack requests, revision rounds, client calls, and ecommerce support are reconsidered case by case, so the team starts work before anyone decides whether it belongs inside the retainer.

This sample recommends a 60-second intake, one commercial decision owner, and a weekly exception review. The estimated value is directional and uses fictional inputs.



SAMPLE FINDINGS

# Where the work disappears

The table below uses five fictional request histories to demonstrate the format of the paid audit.

| Request                       | Original promise        | Observed handling                       | Sample cost | Recommended decision |
|-------------------------------|-------------------------|-----------------------------------------|-------------|----------------------|
| Third landing-page revision   | Two revision rounds     | Completed in Slack without owner review | \$750       | Quote add-on         |
| Weekly client reporting call  | Monthly strategy call   | Added to calendar and never priced      | \$900/mo    | Broader tier         |
| Email campaign support        | Paid media only         | Team accepted to protect relationship   | \$1,200/mo  | Swap or add-on       |
| Urgent weekend product update | Business-hours response | Founder approved informally             | \$640       | Rush fee or decline  |
| Analytics cleanup             | CRO test reporting      | Treated as a quick fix                  | \$900       | Scoped mini-project  |

## Patterns

| Pattern                | Evidence in sample                                        | Commercial effect                                   |
|------------------------|-----------------------------------------------------------|-----------------------------------------------------|
| Undefined availability | 7-day access and 24-hour changes are not a priced service | Client expectation expands without a price decision |
| No request owner       | Delivery staff decide while trying to maintain momentum   | Exceptions become invisible favors                  |
| Late discovery         | Founder reviews margin at invoice or renewal time         | Work is already delivered and hard to reprice       |
| Inconsistent language  | Each team member explains scope differently               | Client experiences the rule as negotiation          |

Priority

Make the decision visible before labor begins. The goal is not to invoice every favor; it is to include favors deliberately instead of accidentally.

PROPOSED OPERATING SYSTEM

# One rule the whole team can use



## Decision matrix

| Decision | Use when                                         | Client-safe language                                                   | Required record             |
|----------|--------------------------------------------------|------------------------------------------------------------------------|-----------------------------|
| Include  | Strategic favor with controlled effort           | We can include this once within the current cycle.                     | Reason + estimated hours    |
| Swap     | New request is more valuable than a planned item | We can replace X with Y and keep the current fee and date.             | Removed item + new item     |
| Quote    | Clear added outcome, effort, or urgency          | This sits outside the current scope. We can add it for \$X and Y days. | Price + schedule + approval |
| Decline  | Poor fit, capacity risk, or unacceptable terms   | We cannot add this safely within the current engagement.               | Reason + alternative        |

## Minimum weekly owner view

| Client       | Open exception         | Decision     | Value      | Next action                 |
|--------------|------------------------|--------------|------------|-----------------------------|
| Atlas Retail | Email campaign support | Quote        | \$1,200/mo | Send tier option Friday     |
| Harbor Goods | Weekend product update | Include once | \$640      | Record reason and reset SLA |
| Mason Home   | Analytics cleanup      | Quote        | \$900      | Await written approval      |

## Success measures

|                  |                   |                      |                  |
|------------------|-------------------|----------------------|------------------|
| < 24h            | > 90%             | 0                    | Weekly           |
| TIME TO CLASSIFY | REQUESTS RECORDED | WORK BEFORE DECISION | EXCEPTION REVIEW |

IMPLEMENTATION MAP

# From audit to a live system

| Days | Work                                                      | Output                         |
|------|-----------------------------------------------------------|--------------------------------|
| 1-2  | Review one SOW, request channels, and ten examples        | Leak map and top request types |
| 3-5  | Build service matrix, decision rights, and client scripts | Configured playbook            |
| 6-8  | Run real requests with the delivery team                  | Corrected live workflow        |
| 9-10 | Train owner and launch weekly review                      | Handoff + 30-day support       |

**Paid next step**

\$750 scope-leak audit for one live account. The full amount is credited toward the \$2,500 implementation when started within 30 days.

## What the real audit requires

| Input              | Minimum evidence                                             |
|--------------------|--------------------------------------------------------------|
| Commercial promise | Current proposal, SOW, retainer description, or service list |
| Request history    | Ten anonymized Slack, email, meeting, or revision examples   |
| Delivery economics | Loaded hourly cost or another agreed valuation method        |
| Current rules      | Who decides today and what the client sees                   |

## Important

This document is a demonstration using fictional company data and sample calculations. It is not a client result, revenue guarantee, accounting opinion, contract advice, or legal advice. Actual findings depend on the evidence supplied and the client's commercial decisions.

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