

Provisional Fit Note

Where to investigate first in one paid service

[Firm] · [Call date] · [Actual conversation owner] · [Buyer owner]

Prepared blank template · intended for a short buyer-owned recap. Based on the maintained v2 Fit Note.

Unfilled fields are not buyer facts.

Your ambition: [Buyer’s own words; no assumed capacity, revenue or savings result.]

Service and recent engagement: [Paid service, client decision/output and one engagement described without protected client details.]

How the work runs: [Buyer-described path from scope → inputs → preparation → review → accepted output → billing, only where discussed. Mark missing steps unknown.]

What already works: [Buyer report and anything actually observed; preserve effective people, methods and tools.]

Where to investigate first: [One candidate preparation, checking or coordination opportunity, or “No constraint/opportunity established.”]

Basis	Record
You told us	[Actual buyer account; unverified unless checked.]
We observed or checked	[Source/observation, or “None independently checked.”]
Working hypothesis	[What may merit investigation, not an established diagnosis.]

Possible AI support / decisions you retain: [Bounded candidate preparation job, existing tools it would need to fit, accountable reviewer and approval. If fit is unclear, record that.]

What still needs checking: [One proportionate evidence check, required baseline, each-side owner and only an actually agreed date. No confidential upload required for this initial recap.]

Recommended next step and why: [Keep current method / simpler process or software / evidence check / scope a Blueprint / buyer-dated deferment / stop. Explain the evidence and uncertainty.]

Assumptions and corrections: [State assumptions; invite correction. No professional approval, validated savings, complete system design or paid commitment is established by this note.]

You keep this recap whether or not you proceed. A paid Firm Capacity Blueprint separately maps one important revenue path and fully designs three connected opportunities; installation is scoped and quoted separately.