

PREPARED TEACHING DRAFT

Compare the example with one service you already sell

Optional companion to the fictional advisory report · Prepared teaching draft · 5 October 2026.

The sample shows a client decision, three evidence-backed findings and a conditional recommendation. Its case and sources are fictional. It illustrates work preparation and review; it does not establish professional approval, an installed system or measured savings.

Three useful things to inspect

- The client output.** Read the recommendation first. It proposes a limited pilot and explains when no launch remains reasonable. Compare that with the decision your own client pays you to help make.
- The basis for the recommendation.** Each finding names its source notes. One account of paying a premium does not establish general willingness to pay. Compare this with how your firm keeps claims connected to evidence and conflicting accounts.
- The decision a person retains.** Evidence preparation and comparison can support a reviewer. Source adequacy, professional interpretation and external issue remain human decisions. The separate scripted review exercise is teaching material, not professional acceptance.

An optional comparison you can keep

Choose one recent engagement without naming the client or sharing files. You do not need to complete this before a call.

Compare	Your own notes
What decision or deliverable did the client buy?	
What already worked well?	
Which preparation, checking or coordination step would you investigate first, if any?	
What must remain with your reviewer or partner?	
What would you need to measure before changing the method?	

These are questions to investigate, not a diagnosis of your firm. No call is required to use the sample or this sheet.

Optional generic worksheet · no analysis of your firm has been performed.