



A FREE WORKING GUIDE

The Baseline

How to record where your business stands before you build anything, so that in ninety days you can show what changed instead of arguing about it.



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The whole thing in one sentence

Write down three numbers before you build anything, and in ninety days you will know exactly what it returned.

About Growth Right Solutions.

Growth Right Solutions places a Chief AI Officer inside owner-led companies that cannot justify hiring one full time.

The work is done with a client's leadership team rather than handed to them. Strategy, governance, and building sit in one accountable seat, instead of a strategist, a builder, and a vendor who each answer for a different part of the result.

Who we work with

Owner-led and family-owned companies, including partnerships, between \$20M and \$40M in revenue with 40 to 250 employees. No private equity, no venture investors, and no outside board. The people in the room can decide.

Specialty contracting, large home services, roll-ups and holding companies, and emerging franchisors.

Why we wrote this

Recording the starting point is the least glamorous part of this work and the part that decides whether any of the rest can be defended. It takes about two weeks and it costs nothing, and almost nobody does it.

This guide sets out how, in enough detail that a leadership team can do it without help.

Who wrote it

W. Ed Becker spent twenty six years running a managed IT services company, where the average client stayed 17.5 years against an industry norm of three to five. Before that, seventeen years in government technology as Director of the Eastern Zone for the General Services Administration.

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SECTION ONE

The question that arrives at ninety days.

Three months after something new goes live, somebody asks the obvious question. Is it working?

It is a fair question and it deserves a real answer. In most companies the answer is a feeling. It seems better. People say it helps. The person who championed it is confident and the person who paid for it is not.

This guide is about being able to answer that question with a number, and the work it takes is two weeks of counting before anything gets built.

The figure you have probably seen

MIT's Project NANDA, drawing on three hundred deployment case studies and a hundred and fifty leadership interviews, found that ninety five percent of generative AI pilots delivered zero measurable impact on the bottom line.

It is usually quoted as proof that AI does not work. Read it again, because that is not what it says.

The word doing the work is measurable

The finding is not that ninety five percent of this spending was wasted. The finding is that ninety five percent of it cannot be proven either way.

Some of that money worked and nobody can show it. Some of it did not and nobody can show that either. That is a different problem with a different fix.

The rest of the picture agrees

Morgan Stanley found that only twenty one percent of S&P 500 companies could cite a measurable AI benefit at all by the end of 2025. IBM's CEO study put initiatives delivering expected returns at twenty five percent, with fifty six percent of chief executives reporting no significant financial benefit. S&P Global found that forty two percent of companies abandoned most of their AI projects during 2025.

Every one of those numbers is about evidence rather than capability. Nobody in that data is saying the technology failed to function. They are saying nobody can point at a number.

And the contrast is instructive

Seventy percent of companies deploying narrowly scoped agents report measurable value within sixty days. MIT's own analysis found the largest realized returns sitting in back-office automation, while more than half of budgets went to sales and marketing.

Scoped work, in an unglamorous place, with a number attached. That is the whole difference.

SECTION TWO

What a baseline is.

A baseline is a written record of how a specific process performs today, captured before anything changes, using numbers that come from somewhere other than memory.

That is the whole definition, and each part of it is load bearing.

Specific process, not the whole business

Revenue is not a baseline. Too many things move it. A baseline attaches to one process, such as how inbound calls are handled or how a quote gets from request to sent.

Before anything changes

A number captured after the work has started is not a baseline. It is a checkpoint, and it cannot tell you what the work did.

From a source, not from memory

The most common failure is a number somebody supplied from recollection. People are consistently confident and consistently wrong about how long things take.

THREE THINGS IT SITS ALONGSIDE

A target is what you hope for. A baseline is what is true today, recorded as it is.

A business case argues that something will pay. A baseline is what lets you find out whether it did.

A report is read on the day it arrives. A baseline is written once and read ninety days later, when it becomes the most useful page in the folder.

Why this one is worth doing deliberately

A baseline is the only part of a project that has to happen before anything else and produces nothing on the day it is done. Everyone is keen to start, and the payoff arrives a quarter later. Two weeks of patience at the front buys a number you can stand behind for years.

SECTION THREE

The four kinds of measure that hold up.

A measure is worth recording when anyone can rerun it later and get the same answer. Four kinds meet that test.

Counts

How many of something happened in a period. Calls received. Quotes sent. Invoices raised. Tickets opened. Counts are the strongest measure because they are rarely ambiguous and usually already recorded somewhere.

Times

How long something took, measured between two events that both leave a trace. Time from call received to call answered. Time from quote requested to quote sent. Time from job complete to invoice raised.

Rates

One count divided by another. Calls answered against calls received. Quotes accepted against quotes sent. Rates are useful because they stay meaningful when volume changes.

Hours

How much human time a process consumes. This one is the hardest to capture honestly and the most valuable when you do, because it converts directly into money and into evenings.

Give judgment a unit and it becomes a measure

Customer satisfaction, quality, and productivity are often the things a business cares about most. Each of them becomes usable the moment it has a unit attached.

Satisfaction becomes a survey score with a sample size. Quality becomes rework as a percentage of jobs. Productivity becomes jobs completed per person per week. Attach the unit and the measure holds up in any room, ninety days later.

SECTION FOUR

How to choose measures for a process.

Three measures per process. Not one, and not ten.

One is fragile, because a single number can move for reasons that have nothing to do with the work. Ten becomes a reporting exercise that nobody sustains past the second month.

The three that work

One that shows volume. How much of this is happening. This is what protects you from a false result, because a process that got faster while volume halved did not get faster.

One that shows speed or coverage. How quickly it happens, or how much of it gets handled at all.

One that shows the human cost. How many hours it consumes, or how many times it interrupts somebody.

Four tests before you commit to a measure

- ☐ **Can you get it today?** If capturing it requires building something first, it is not a baseline measure.
- ☐ **Will it still be captured the same way in a year?** A measure that depends on a person remembering to log something will decay.
- ☐ **Would two people reading it agree?** If the number needs interpreting, it will be interpreted differently later.
- ☐ **Does anyone actually care about it?** A measure nobody in leadership cares about will not survive its first quiet quarter.

MEASURE WHAT MATTERS FIRST

Decide what the business actually cares about, and measure that. Whether the customer got an answer. How long they waited. How many hours the team spent getting there. How many jobs went out on time.

Where the measure that matters is harder to collect than one sitting nearby, take the harder one and find a way. Two weeks of hand counting is a small price for a number that means something in ninety days.

SECTION FIVE

Where the numbers come from.

Every measure needs a named source, recorded alongside it. Not a person. A system, a report, or a file that somebody could open in a year and get the same answer.

MEASURE	WHERE IT USUALLY ALREADY EXISTS
Calls received and answered	The phone system's own reporting
Response and resolution times	Ticketing or help desk system
Quotes sent and accepted	The quoting tool or the accounting system
Days from job complete to invoice	The accounting system
Hours spent on a task	Time entry, payroll, or a two week manual count
Volume of a recurring request	Inbox rules, forms, or a two week tally

When the number does not exist anywhere

This happens more often than people expect, and it is not a reason to skip the baseline. It is a reason to count by hand for two weeks.

Ask the person who does the work to keep a simple tally. How many times this happened today. How long it took. Two weeks of honest hand counting is a better baseline than a year of nobody knowing, and the exercise itself usually surfaces something worth knowing.

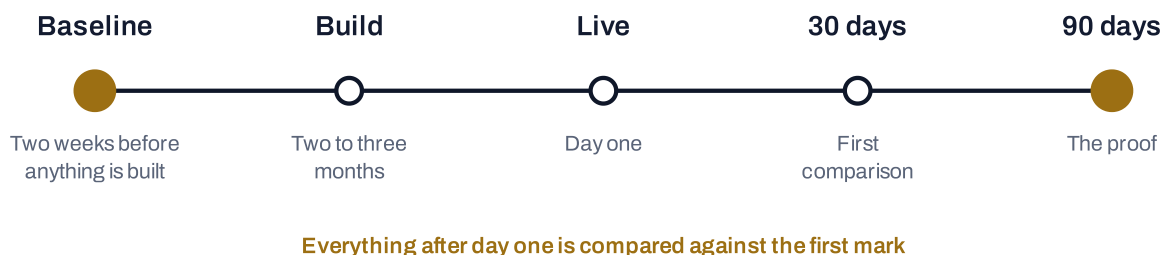
Write the source down, not just the number

In ninety days somebody will ask where the number came from. If the answer is that Sandra worked it out, the comparison is over. If the answer is a named report anybody can rerun, the comparison holds.

SECTION SIX

How long to measure before you build.

Two weeks is the working answer for most processes in a company of this size. Long enough to see a normal pattern, short enough that nobody loses patience.



When two weeks is not enough

If the process is weekly or monthly. Month end cannot be baselined in a fortnight. Capture two cycles.

If the business is seasonal. A roofing company measuring in February has not measured its year. Either capture a representative period or record clearly which part of the season the baseline covers, so the comparison is made against the same part next time.

If volume is very low. A process that happens four times a month needs a longer window before the numbers mean anything.

When less is acceptable

If the system already holds a year of history, you do not need to wait at all. Pull the last three months and use that. The waiting is only necessary when the number has to be captured by hand.

RUN THE COUNTING ALONGSIDE THE DESIGN WORK

Capture the baseline while the specification and design are under way. Those weeks are happening regardless, and the counting fits inside them at no cost to the schedule.

Done that way, the measurement is finished on the day the build begins and the project starts exactly when it would have anyway.

SECTION SEVEN

The baseline record.

One of these for each process. Keep it somewhere findable, because its whole value arrives ninety days from now.

THE PROCESS

What it is

Who does it today

How often it happens

Period measured, from

Period measured, to

MEASURE	KIND	VALUE TODAY	SOURCE IT CAME FROM

Kind is one of volume, speed or coverage, or human cost. One of each.

SIGNED OFF

Anything unusual in this period

Recorded by

Date recorded

Measures agreed by

Next comparison due

Note anything unusual now, such as a holiday, an outage, or a large one-off job. Agree the measures before the build starts, so the comparison at ninety days rests on something everyone chose together.

SECTION EIGHT

What happens at thirty days and ninety days.

At thirty days you are checking, not judging

Rerun the same three measures from the same sources. At thirty days the questions are whether the thing is being used and whether it is behaving as expected.

Thirty days is exactly right for a correction, and most of the tuning that decides the ninety day result happens in this window. Treat it as the tuning pass rather than the verdict.

At ninety days you are proving

Rerun the measures again and put the three numbers side by side with the baseline. Then do two more things that most people skip.

Convert the hours into money. Hours saved are only persuasive to the person who was doing them. A rate applied to those hours is persuasive to everybody else.

Write down what else changed. If volume doubled, or two people left, or a large customer arrived, record it beside the comparison. A result that acknowledges its own confounders is far more credible than one that does not.

If the numbers moved less than expected

You have found that out in ninety days, on one process, while the next one is still being designed. That is early enough to change course, and it is worth as much as a good result because it is information you can act on.

What a finished comparison looks like

Calls answered went from 71 percent to 99 percent. Average time to answer went from four minutes to under ten seconds. Front desk hours spent on the phone fell by fourteen a week. Source is the phone system report, the same report as the baseline. Volume rose nine percent over the period.

That is not a claim. It is a comparison, and it holds up in any room in the building.

SECTION NINE

Five things that keep a baseline intact.

A baseline holds its value for years when five things stay true. Each one takes a minute to get right at the start.

One. Capture it before anything changes

The starting point exists only while the process is still the old process. Take the measurements first, then begin. Where the team is keen to start early, let the design work run alongside the counting rather than ahead of it.

Two. Keep the same measures all the way through

The three measures chosen at the start are the three reported at ninety days. If a better measure appears later, add it alongside and keep reporting the original. Continuity is what makes the comparison mean something.

Three. Take every number from a source

A named report, a system export, or a hand count with dates on it. Anything anyone could rerun in a year and get the same answer. Write the source beside the number, because in ninety days somebody will ask where it came from and a good answer settles it in seconds.

Four. Give the measures an owner and a date

One named person produces the numbers, on the same date each month. That single assignment is what carries a measurement program past its second month.

Five. Measure the outcome, not the activity

The system handled four thousand conversations is a count of the tool running. Hours returned, customers answered, and money that stayed in the business are counts of the company improving. Reach for the second kind every time.

WHAT THESE FIVE HAVE IN COMMON

Each one takes a minute at the start and preserves the ability to prove something three months later. None of them requires a tool, a budget, or anyone's permission.

SECTION TEN

A worked example.

A specialty contractor decides the first thing to build is a system that answers the phone around the clock, handles what it can, and books appointments.

The three measures chosen

MEASURE	KIND	SOURCE
Calls received per week	Volume	Phone system report
Percentage answered	Coverage	Phone system report
Front desk hours on the phone	Human cost	Two week hand count

Why those three

Calls received protects against a false result, because a coverage improvement during a quiet fortnight proves nothing. Percentage answered is the thing the business actually cares about, since an unanswered call in this trade is usually a lost job. Hours on the phone is the human cost, and it is the number that converts to money and to somebody's evenings.

The first two came out of a system that had been recording them all along and nobody had looked. The third had to be counted by hand for two weeks, and that count surfaced something nobody expected, which was how many calls were arriving after five in the afternoon.

What was recorded

MEASURE	TWO WEEK BASELINE
Calls received per week	412
Percentage answered	71 percent
Front desk hours on the phone per week	26
Noted alongside	One day lost to a storm closure

Illustrative figures. The point is the shape of the record rather than the numbers in it.

What the number buys you.

A baseline is two weeks of counting. What it produces is worth considerably more than the effort, and in four separate ways.

The confidence to do the next one

An owner who can point at a result will authorize the second project in an afternoon. An owner who cannot will spend six months deciding, and the company stands still while he does. The number is what turns one success into a program.

The evidence to bring the team with you

People support what they can see working. A team shown that fourteen hours a week came back, and where those hours went, stops treating the next change as something happening to them.

A company that is worth more

Documented processes with measurements attached are the difference between telling a buyer the business runs well and showing him. Owner-dependent companies trade at a discount of one to two turns of EBITDA against peers who can demonstrate how the work gets done, and every measured process moves the company across that line.

And the part that matters most

Every hour returned by a measured process is an hour that stops arriving in someone's evening. The quote that goes out without you. The call answered at seven on a Friday with nobody's phone ringing at the dinner table.

Dan Sullivan names four freedoms. A baseline turns them from an intention into something you can watch happen.

Freedom of money is the one it speaks to directly. Not the size of the return, but the certainty of it. An owner with a measured result approves the next technology budget on evidence rather than on faith, and defends it the same way.

Freedom of time follows from that certainty, because the hours a measured process returns are hours you can count, and counted hours are the ones that actually get taken.

Freedom of relationship and freedom of purpose are what those hours get spent on, and they are the subject of the companion guides.

What certainty is actually worth

Most owners at this size have approved technology spending they could never verify, which makes them slower to approve the next thing. That caution is reasonable and it is expensive.

A number ends it. Once one project has been measured properly, the second decision takes an afternoon instead of six months, and the company starts moving at the pace the owner always wanted it to.

SECTION TWELVE

Where to start this week.

Four steps, none of which requires buying anything.

Pick one process

The one that would give back the most hours to the most people if it were fixed. Not the most interesting one.
The most expensive one.

Choose three measures

One volume, one speed or coverage, one human cost. Run each through the four tests on page 7.

Find out what already exists

Before anyone counts anything by hand, check what your phone system, accounting system, and ticketing system are already recording. In most companies at least one of the three measures is already there and has never been looked at.

Start the clock

Two weeks, beginning on a Monday. Whatever cannot be pulled from a system gets counted by hand by the person who does the work. Write down the dates and anything unusual that happens during the period.

Then put it somewhere you will find it

The single most common way a baseline is lost is that it was captured properly and then filed where nobody could find it ninety days later. Name the file after the process and the date, and tell the leadership team where it lives.

What this guide cannot do for you.

It cannot tell you which process to start with

Section eleven says to pick the most expensive one. Working out which that is means walking through how work actually moves through your company from first contact to getting paid, and the answer is frequently not the process leadership assumed.

It cannot make the measures get taken

Two weeks of hand counting competes with running the business, and the business wins unless somebody owns it and somebody asks about it. That is not a document problem.

It cannot build what comes next

A baseline makes a result provable. It does not produce one. What produces one is choosing the right process, building it properly, and giving it three months to run before anything else begins.

If you want the rest of it

Growth Right Solutions works with owner-led companies to find where the work is getting stuck, record where things stand, and build the systems that move it.

The place to start is The Check. Twelve questions, about two minutes, and a reading on screen at the end. No email is required and the reading is yours whether or not we ever speak.

GrowthRight.Solutions/check

TWO COMPANION GUIDES

The AI Governance Policy Template covers what may be built and who approves it, which is the work that comes before this one.

The Owner Dependency Discount covers why documented, transferable process is worth money at exit. Both are free at GrowthRight.Solutions.

REFERENCES

Sources.

Every figure quoted in this guide comes from one of the following.

The ninety five percent figure

MIT Project NANDA, state of enterprise generative AI, published late 2025. Drawing on three hundred deployment case studies and a hundred and fifty leadership interviews, the study found that ninety five percent of generative AI pilots delivered no measurable profit and loss impact. The study identifies a learning gap as the core issue, where generic tools serve individuals well but stall in organizations because they do not adapt to specific workflows.

Corroborating findings

Morgan Stanley, fourth quarter 2025, finding that twenty one percent of S&P 500 companies could cite a measurable AI benefit. IBM CEO study, placing initiatives delivering expected returns at twenty five percent, with fifty six percent of chief executives reporting no significant financial benefit. S&P Global, finding that forty two percent of companies abandoned most AI projects during 2025. Boston Consulting Group AI at Scale survey of 1,800 executives, 2026, finding twenty six percent had generated meaningful financial value.

Where returns are being found

MIT Project NANDA, finding the largest realized returns in back-office automation while more than half of generative AI budgets went to sales and marketing. Industry reporting that seventy percent of companies deploying narrowly scoped agents report measurable value within sixty days.

Abandonment

Gartner, estimating that thirty percent of generative AI projects launched in 2024 will be abandoned by the end of 2026 due to poor return, escalating costs, or unclear business value.

On the worked example

The contractor in section ten is illustrative and is not a real client. The figures are stated so that you can see the shape of a baseline record rather than to represent any particular result.

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About the author

W. Ed Becker, CCSM, is the founder of Growth Right Solutions, LLC, which places a Chief AI Officer inside owner-led companies that cannot justify hiring one full time.

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