

How to complete your Pilot Plan

A one-page guide to sit in front of the template

PURPOSE

Freeze one rule, verify it weekly from an existing report, and decide Pass or Tighten at Day 30. One client. One rule. Four weekly snapshots.

CLIENT

Select one visible client where the governing metric already appears in your standing reports.

SOURCE REPORT LINK

Use the live system view you already run. No exports. No new dashboards. Same report, same way, same day.

OPERATING RULE

Write one sentence that governs behavior for the next 30 to 45 days. It should change who you target, how you sell, how you price, or how you collect. Avoid vague effort language.

APPLICABILITY AND EXCLUSIONS

State exactly where the rule applies and where it does not so compliance is testable.

VERIFICATION

Name the exact report, the field, and the saved view or path. Set a weekly capture time you can keep. Assign one owner by name.

PASS SIGNAL

Define a single yes/no condition tied to the same field you will read at Day 30.

ACTIONS

List two conservative, mechanical actions you will hold constant for the window.

EXCEPTIONS

Pre-write three steps with owners and time boxes for missing or red snapshots.

READ-OUT

Capture evidence from the same source report. Make a single Pass or Tighten decision and lock next steps. If you install, the Pilot fee credits to the install if booked within 30 days.

Note: Weekly verification uses the same source report, same way, same day. Missing or late data is treated as red.

Pilot Plan

HEADER

Firm	Client selected for Pilot
<input type="text"/>	<input type="text"/>
Operating rule under test	Pilot owner inside firm
<input type="text"/>	<input type="text"/>
Effective date	
<input type="text"/>	

PURPOSE

Prove one advisory operating rule in four weeks with verified movement, then decide on installation. One client, one rule, one weekly snapshot, same report, same way, same day.

No financial, tax, or legal advice is provided.

SCOPE

One nominated client, one frozen operating rule, four weekly checks, and a single summary read-out at day 30 to 45. Implementation remains your responsibility.

OPERATING RULE DEFINITION

Rule statement
<input type="text"/>
Why this rule
<input type="text"/>
Owner of the rule at the client
<input type="text"/>

VERIFICATION

Governing snapshot name	System and exact path
<input type="text"/>	<input type="text"/>
Exact field we will read	Baseline value at Week 0
<input type="text"/>	<input type="text"/>
Binary pass signal for Day 30	
<input type="text"/>	
Weekly capture day and time	Named owner who captures and logs
<input type="text"/>	<input type="text"/>

CADENCE

Week 0 setup date

Weeks 1-4 review slot

Participants

Meeting link

WEEKLY SNAPSHOT LOG

Week 1

Value

Notes

Week 2

Value

Notes

Week 3

Value

Notes

Week 4

Value

Notes

EXCEPTIONS PATH

If the snapshot is missing or below threshold, execute within 24 hours:

Step 1

Step 2

Step 3

Weekly verification uses the same source report, same way, same day. Missing or late data is treated as red.

SUMMARY READ-OUT

Outcome

Pass Tighten

Evidence of movement

Recommendation

If Pass

If Tighten

CREDIT AND NEXT STEP

If you proceed to the Advisory Meeting Rhythm Install within 30 days of the Pilot read-out, your full Pilot fee is credited toward that install.

Next action if Pass

Next action if Tighten

CONFIDENTIALITY AND IP

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ACKNOWLEDGMENTS AND SIGNATURES

By signing below, the Client confirms: (a) authority to approve and operate this Pilot; (b) materials are for internal use only and no financial, tax, or legal advice is provided.

Client

Legal name

ABN

Authorised signatory

Title

Email

Date

Signature

Consultant

Legal name: Business Growth Strategies Pty Ltd

ABN

Authorised signatory

Title

Email

Date

Signature