

# Diagnostic – Process Overview

## Purpose:

A *time-boxed, decision-grade analytical engagement* designed to **underwrite a value lever before anyone commits to execution** — producing defensible value ranges, explicit assumptions, and evidence gates with owners so leadership can **proceed, pause, or re-scope with confidence**.

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## 1. Scope & Nature of Engagement

- **Format:** Structured diagnostic analysis (asynchronous inputs with checkpoints)
  - **Duration:** Approximately **2 weeks**
  - **Prep Required:** Explicit structured inputs only (no fishing expeditions)
  - **Cost:** Fixed scoped fee, typically **from \$12,500** (most engagements land \$15,000–\$25,000)
  - **Outcome:** A **forwardable decision brief** with ranges, assumptions, and evidence plans.
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## 2. Goals & What You Get

At the end of the Diagnostic, you walk away with:

- ✓ **Low / Base / High value ranges** + payback band (ranges before precision)
  - ✓ **Assumptions ledger** (what must be true for the lever to work)
  - ✓ **Evidence plan** with **pass/fail gates, owners, and sources-of-truth**
  - ✓ **Recommendation:** *Proceed, Pause, or Re-scope* + selected next-step lane
  - ✓ Outputs designed to **survive internal scrutiny** and be used as appendices in IC/lender packets
  - ✓ Clear ownership and criteria — *not just opinions*
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## 3. Inputs (Lightweight, Explicit)

Participants/client must provide only what's necessary to bound value and pressure-test feasibility — no broad discovery:

- **Problem statement & target decision**
- **Constraints:** timeline, systems, compliance, resourcing
- **Current baseline:** volumes, costs, cycle times, conversion rates
- **Stakeholders & named owners** for evidence gates

**4. Timeline & Checkpoints**

The Diagnostic runs with **structured exits** so you don't spend time on levers that don't hold up:

Phase	Focus
Days 1-2	Scope & ranges framing
Days 3-7	Assumptions development + evidence map
Days 8-12	Pressure test + assign owners
Days 13-14	Recommendation + next-step lane

✓ **Stop early** if the lever doesn't survive pressure-testing.

**5. Attendance & Authority**

- **Lead Sponsor / Decision Owner:** Provides scope & constraints
- **Data & System SME:** Baseline evidence sources
- **Compliance/Operations Owner:** Constraint validation
- **Finance / Valuation SME:** Value range validation
- (Optional) Single alignment session if needed — scoped & time-boxed

**6. Deliverables (Decision-Ready Outputs)**

Delivered in a **forwardable, exec-ready packet** that can be used verbatim in internal committees or lender decks:

**A. Decision Memo**

- Value ranges (low/base/high + payback)
- Top assumptions (what must be true)
- Pass/fail evidence criteria
- Recommendation & selected next lane

## B. Evidence Plan

- **Evidence gates** with owners, data sources, and pass/fail criteria
  - Clear articulation of constraints & risk triggers
  - Explicit next steps tied to criteria
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## 7. Why This Works

- **Decision-Grade Outputs:** Designed to be forwarded internally without translation
  - **Bounded Time & Cost:** 2-week time-box with scoped price
  - **Ranges Before Precision:** Removes premature certainty and focuses on defensible boundaries
  - **Explicit Evidence Gates:** Ownership and pass/fail criteria reduce debate and re-work
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