



SAMPLE REPORT — Fictitious Company & Data, For Illustration Only

THE OPERATIONAL BLUEPRINT

A 25-Point Evaluation of Company Operations

March 3, 2026

PREPARED FOR:

Mr. David Reyes, President
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4200 Distribution Drive, Charlotte, NC 28269

PREPARED BY:

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Cover Letter

March 3, 2026

Mr. David Reyes
Ironbridge Electrical Contractors, LLC
4200 Distribution Drive, Charlotte, NC 28269

Dear David,

It has been a pleasure working with Ironbridge Electrical Contractors on this Operational Blueprint evaluation. This report reflects what we found across 25 specific points covering leadership, preconstruction, accounting, project management, field operations, technology, and general company practices — gathered through our initial background call, document review, on-site evaluation, and follow-up conversations with your team.

The findings in this report are organized to give you a clear, honest picture of what's working well, what deserves attention, and what should be prioritized first. Not every recommendation will apply equally — some may not align with the current direction of the company, and that's alright. Our goal is to give you clarity, not a one-size-fits-all checklist.

This evaluation follows our conversation this winter about Ironbridge's next phase of growth. You mentioned wanting a clearer picture of where things stood operationally before taking on larger projects — this report is built with that specifically in mind, particularly the estimating, cash flow, and succession questions we discussed.

We're available to walk through this report together and to help however makes sense — whether that means tackling the top priorities with us, or simply having a clear roadmap to work from on your own.

Sincerely,

Kevin Juliano
Brookcal Partners, LLC

Executive Summary

Ironbridge Electrical Contractors has built a genuinely strong field operation. Across every interview conducted on site, safety, craft quality, and crew morale came through as real, consistent strengths — not just management's self-assessment, but something field employees independently described the same way. The company's reputation with its core GC relationships is solid, pay applications go out on time, and turnover among licensed journeymen is low. This is a company that does good work and treats its people well, and that foundation matters: it means the recommendations in this report are about protecting and building on something real, not fixing a company in distress.

That said, the evaluation surfaced a clear pattern: the risks at Ironbridge sit almost entirely behind the scenes, in the systems and habits that don't show up on a finished project but quietly determine whether that project was actually profitable. Estimating isn't grounded in historical cost data, and a sample of six recent jobs showed labor costs averaging 14% over the original bid — a gap large enough to erase margin on an otherwise well-run project. Change orders are frequently performed in the field before written approval is secured, which we estimate has cost Ironbridge \$60,000 to \$80,000 in unbilled work over the past year alone. And closeout documentation regularly runs 60 to 90 days behind substantial completion, which is directly delaying retainage release on multiple active jobs right now.

There is also a longer-term concern worth naming directly: a meaningful share of what makes Ironbridge run well — pricing judgment, GC relationships, field leadership — is concentrated in a small number of people, David included, with no documented plan for what happens if any of them are unexpectedly unavailable for an extended period. This doesn't need to be solved this quarter, but it does need to start being addressed deliberately rather than left as an open question.

None of this requires a major overhaul. The highest-value next steps identified in this report — tightening change order documentation and closing a basic cybersecurity gap involving shared logins and no multi-factor authentication — are both fast, inexpensive, and immediately protective of margin and risk exposure. We'd recommend starting there, and using the momentum from those quick, visible wins to tackle the larger estimating and succession questions over the following two quarters.

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How This Report Was Built

1. Initial background call — 90 minutes via Zoom with leadership to understand the company before any on-site work.
2. Document request & review — completed roughly 2 weeks ahead of the on-site visit.
3. On-site evaluation — 2–3 days on site covering all 25 points in person.
4. Follow-up interviews — additional Zoom conversations with individuals or small groups, as needed.
5. Report delivery & review — this report, followed by a live review call with leadership.

How to Read This Report

Each of the 25 points is scored three ways: a **Rating** (how the company is performing today), an **Impact** estimate (how much fixing it would actually help), and an **Effort** estimate (how hard it would be to fix). Together, these three make it easy to spot the highest-value starting points — usually where impact is high and effort is low.

Rating Legend

Rating	What It Means
Strong	Performing well — no action needed at this time.
Adequate	Functional, but there's a clear opportunity to improve.
Needs Attention	A meaningful gap that should be addressed in the near term.
Critical	Significant risk or cost exposure — recommend addressing immediately.

Impact Legend

Impact	What It Means
Low	Fixing this makes things a little better, but won't move the needle much.
Moderate	A noticeable improvement to how the company runs day-to-day.
Important	A meaningful improvement to margin, risk, or scalability.
Strategic	Foundational — affects the company's ability to grow or compete long-term.

Effort Legend

Effort	What It Means
Quick Fix	Can be implemented in days with minimal disruption — often a policy or settings change.
Moderate Effort	Requires real planning and some time investment, but is achievable with current resources.
Major Undertaking	Requires significant time, budget, and/or organizational change to implement.

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Summary of Findings — All 25 Points

A quick-reference view of every evaluation point with its Rating, Impact, and Effort. Full findings and recommendations for each point follow in the Detailed Findings section.

Category	Evaluation Point	Rating	Impact	Effort
Leadership	Leadership effectiveness & team confidence in leadership	Adequate	Important	Moderate Effort
	Succession planning & leadership bench strength	Needs Attention	Strategic	Major Undertaking
	Clarity of roles and reporting lines	Strong	Low	Quick Fix
Preconstruction	Marketing, solicitations, & client management	Adequate	Important	Moderate Effort
	Estimating accuracy & use of historical cost data	Critical	Strategic	Moderate Effort
Accounting Practices	Job costing accuracy & timeliness	Needs Attention	Important	Moderate Effort
	Billing & AR process (draw schedules, pay app turnaround, collections)	Strong	Moderate	Quick Fix
	Cash flow forecasting & management	Needs Attention	Strategic	Moderate Effort
Project Management	Scheduling practices & schedule adherence	Adequate	Important	Quick Fix
	Project cost forecasting	Needs Attention	Important	Moderate Effort
	Change order process & documentation	Critical	Strategic	Quick Fix
	Subcontractor/vendor management & accountability	Strong	Low	Quick Fix
	Risk identification & mitigation practices	Needs Attention	Important	Moderate Effort
	Project closeout & punch list completion process	Critical	Important	Quick Fix
Field Operations	Field-to-office communication systems	Needs Attention	Important	Moderate Effort
	Crew productivity tracking & labor efficiency	Adequate	Low	Quick Fix
	Safety program consistency & enforcement	Strong	Low	Quick Fix
	Quality control processes	Strong	Moderate	Quick Fix
	Equipment & material management	Needs Attention	Low	Major Undertaking
Technology Usage	Technology utilization	Needs Attention	Important	Moderate Effort
	Cybersecurity practices & data protection	Critical	Strategic	Quick Fix
General Company Practices	SOPs — existence, accessibility, and actual use	Adequate	Low	Quick Fix
	Employee retention & turnover patterns	Needs Attention	Strategic	Major Undertaking
	Internal communication & feedback loops	Adequate	Important	Quick Fix
	Recognition & morale practices	Strong	Low	Quick Fix

Detailed Findings & Recommendations

Leadership

Leadership effectiveness & team confidence in leadership

Observation: Across interviews with three project managers and five foremen, a consistent picture emerged: David is genuinely well-liked and respected, and nobody questioned his judgment or fairness. The issue is structural, not personal. Multiple PMs described a pattern where pricing exceptions, schedule trade-offs, and even minor scope calls route through David personally before moving forward — regardless of dollar value or complexity. One specific example came up independently in two separate interviews: during a busy bid week in late 2025, a \$40,000 pricing exception on the Mecklenburg County Courthouse project sat unresolved for nine days waiting on David's availability, during which the GC's window for a related change narrowed considerably. Foremen in particular described a learned caution around making field-driven calls, even ones clearly within their stated authority, because “it's just easier to check with David first than to guess wrong.” This isn't a competence gap among the PM team — it's an absence of explicit delegated authority, and it's quietly slowing the company down in exactly the moments (bid week, active field decisions) when speed matters most.

Recommendation: Establish a written delegation matrix that spells out, by role, what dollar amounts and decision types PMs and foremen can act on without ownership sign-off — for example, pricing exceptions under \$15,000 or schedule adjustments that don't affect the overall completion date. Start with a 90-day pilot on two active projects, review what worked and what didn't with the PM team directly, and then roll the finalized matrix out company-wide. This alone should meaningfully reduce the bottleneck without requiring David to give up visibility into anything that genuinely warrants his input.

Rating: Adequate **Impact:** Important **Effort:** Moderate Effort

Succession planning & leadership bench strength

Observation: Ironbridge has no documented succession plan of any kind — not for ownership, not for estimating, and not for field leadership. This gap is more urgent than it might first appear: two of the company's three senior project managers indicated in interviews that they are thinking seriously about retirement within the next three to five years, and neither has a clearly identified successor being developed. Estimating is a particular point of concentration risk. When asked to walk through how a bid gets built, both junior estimators described the process as “learning by watching” rather than following any documented methodology, and several noted that pricing judgment calls on complex scopes (large gear, emergency power systems, and phased occupancy work in particular) still route through David or one of the senior PMs almost by default. If any one of these three people were unexpectedly unavailable for an extended period, Ironbridge would lose access to a significant share of its institutional pricing knowledge overnight. This is squarely a strategic risk rather than an operational inconvenience — it affects the company's ability to grow, to be valued accurately in any future transaction, and to survive a leadership transition without disruption to clients or crews.

Recommendation: Begin identifying one to two internal candidates for both estimating and PM leadership now, even informally, and start giving them structured exposure to the judgment calls currently concentrated in senior staff — sitting in on pricing decisions, shadowing GC relationship conversations, and gradually taking ownership of smaller bids end-to-end. In parallel, draft a written three-to-five-year transition outline for David's own role, even in rough form. This doesn't need to be

finalized immediately, but having a directional document in place changes this from an unaddressed risk to a managed one, which matters both for internal planning and for how the company would be perceived in any future ownership or financing conversation.

Rating: Needs Attention **Impact:** Strategic **Effort:** Major Undertaking

Clarity of roles and reporting lines

Observation: This was one of the more straightforward points to evaluate, and Ironbridge performs well on it. The org chart provided during document review was current as of last month, and in every interview — office staff, PMs, and field foremen alike — each person could immediately and correctly identify who they report to, and who covers their responsibilities when they're out. The one minor exception worth noting: the low-voltage division, which was added through a small team hire in 2024, doesn't yet appear on the formal org chart, and its two technicians described reporting informally to whichever PM has an active project needing their work that week. This hasn't caused a real problem yet, but it's worth formalizing before the division grows further.

Recommendation: No broader action needed — this is a genuine strength. The only specific item worth addressing is adding the low-voltage division formally to the org chart, with a clearly designated primary reporting line, during the next scheduled org chart review.

Rating: Strong **Impact:** Low **Effort:** Quick Fix

Preconstruction

Marketing, solicitations, & client management

Observation: Ironbridge's revenue is heavily concentrated among three general contractors — referred to internally as its “core three” — who together represented roughly 78% of total contract value over the past two fiscal years, based on the project list provided during document review. This concentration has served the company well: relationships are deep, trust is high, and the pipeline has been dependable. But it also means Ironbridge's growth trajectory is largely dictated by three other companies' project pipelines rather than its own business development effort. There is currently no tracking of bid win/loss rates, no record of why bids were lost when they were, and no structured outreach to GCs outside the core relationships. When asked how a new GC relationship typically starts, David described it as “usually somebody who used to work with one of our current GCs and remembers us” — which is a real asset, but not a repeatable strategy on its own.

Recommendation: Start tracking win/loss outcomes on every bid submitted, including a brief note on why a bid was or wasn't won — this data becomes valuable within just a few quarters. Separately, set a modest, specific goal (for example, two new qualified GC relationships per year) and assign ownership of light, consistent outreach to a specific person, even if it's only a few hours a month. The goal isn't to move away from the core three relationships, but to reduce the risk of any single one of them slowing down or ending.

Rating: Adequate **Impact:** Important **Effort:** Moderate Effort

Note: For the purposes of this sample, full-length findings have been summarized. In a completed engagement, every one of the 25 points would receive a comprehensive level of detail: specific observations grounded in interviews, documents, and on-site evidence, paired with a concrete recommendation. The remaining points below are shown at a shorter summary length to keep this sample a manageable size.

Estimating accuracy & use of historical cost data

Observation: Estimates are built project-by-project in spreadsheets with no consistent reference back to actual historical labor or material costs from completed jobs. A sample of 6 recent projects showed final labor costs averaging 14% over the original estimate.

Recommendation: Build a historical cost database from closed jobs and require estimators to reconcile new bids against it before submission. This is the single highest-leverage fix available to Ironbridge's margins.

Rating: Critical **Impact:** Strategic **Effort:** Moderate Effort

Accounting Practices

Job costing accuracy & timeliness

Observation: Job costs are updated in the accounting system roughly every 2-3 weeks rather than weekly, so PMs are often making decisions on jobs that are already a few weeks out of date financially.

Recommendation: Move to a weekly job cost update cycle, even if it requires temporary administrative support to close the gap.

Rating: Needs Attention **Impact:** Important **Effort:** Moderate Effort

Billing & AR process (draw schedules, pay app turnaround, collections)

Observation: Pay applications are submitted on time consistently, and AR aging beyond 60 days is minimal — well ahead of typical subcontractor benchmarks.

Recommendation: No action needed — this is a genuine strength worth highlighting when bidding new GC relationships.

Rating: Strong **Impact:** Moderate **Effort:** Quick Fix

Cash flow forecasting & management

Observation: There is no rolling cash flow forecast; cash position is monitored reactively through the bank balance. This creates avoidable stress around payroll and material purchasing during slower collection periods.

Recommendation: Implement a simple 13-week rolling cash flow forecast, updated weekly, tied to the job costing and AR data already being tracked.

Rating: Needs Attention **Impact:** Strategic **Effort:** Moderate Effort

Project Management

Scheduling practices & schedule adherence

Observation: PMs maintain schedules in Procore reasonably well, but updates often lag 1-2 weeks behind actual field progress, which undercuts their usefulness for crew planning.

Recommendation: Set a standing expectation that field schedules are updated every Friday before the weekly PM meeting — a scheduling habit, not a system change.

Rating: Adequate **Impact:** Important **Effort:** Quick Fix

Project cost forecasting

Observation: PMs can report cost-to-date accurately but rarely forecast cost-at-completion until a job is nearly finished, which limits the ability to course-correct mid-project.

Recommendation: Require a monthly cost-at-completion forecast on every active job over \$100K, reviewed in the PM meeting.

Rating: Needs Attention **Impact:** Important **Effort:** Moderate Effort

Change order process & documentation

Observation: Field-driven change orders are frequently performed before written approval is secured, and several recent examples showed work completed with no signed change order at all — an estimated \$60-80K in unbilled change work over the past year.

Recommendation: Institute a firm no-work-without-a-signed-change-order policy, supported by a simple field-usable change order form. This is a fast, low-cost fix with immediate, direct impact on margin.

Rating: Critical **Impact:** Strategic **Effort:** Quick Fix

Subcontractor/vendor management & accountability

Observation: Ironbridge's relationships with its material suppliers and low-voltage sub-tier partners are well established, with clear expectations and few recurring issues reported by PMs.

Recommendation: No action needed at this time.

Rating: Strong **Impact:** Low **Effort:** Quick Fix

Risk identification & mitigation practices

Observation: Risk is discussed informally at project kickoff but isn't documented or revisited as projects progress, so early warning signs (schedule slippage, scope creep) aren't consistently escalated.

Recommendation: Add a one-page risk log to the project kickoff packet, reviewed briefly at each monthly PM check-in.

Rating: Needs Attention **Impact:** Important **Effort:** Moderate Effort

Project closeout & punch list completion process

Observation: Closeout documentation and punch list completion regularly stretch 60-90 days past substantial completion, which is directly delaying retainage release on multiple active jobs.

Recommendation: Assign closeout ownership to a specific person on each job at the start of the project, not after completion, and set a 30-day closeout target.

Rating: Critical **Impact:** Important **Effort:** Quick Fix

Field Operations

Field-to-office communication systems

Observation: Foremen communicate with the office primarily through phone calls and texts, which aren't captured anywhere centrally — creating gaps when questions arise later about what was discussed or approved.

Recommendation: Move daily field-to-office updates into Procore's Daily Log tool, which is already licensed but underused.

Rating: Needs Attention **Impact:** Important **Effort:** Moderate Effort

Crew productivity tracking & labor efficiency

Observation: Labor hours are tracked by job but not compared against the original estimate in any regular, visible way, so productivity trends go unnoticed until a job is already over budget.

Recommendation: Add estimated-vs-actual labor hours to the existing weekly job cost report — a formatting change, not a new process.

Rating: Adequate **Impact:** Low **Effort:** Quick Fix

Safety program consistency & enforcement

Observation: Ironbridge's safety record and toolbox talk consistency are genuinely strong, with an EMR well below industry average and no lost-time incidents in the past two years.

Recommendation: No action needed — continue current practices.

Rating: Strong **Impact:** Low **Effort:** Quick Fix

Quality control processes

Observation: Rework rates are low and foremen consistently self-inspect before calling for owner or GC walkthroughs, reflecting a strong craft culture.

Recommendation: No action needed at this time.

Rating: Strong **Impact:** Moderate **Effort:** Quick Fix

Equipment & material management

Observation: Small tools and material overages are tracked informally, if at all, and several foremen mentioned recurring 'phantom' shrinkage they can't fully explain.

Recommendation: A full asset-tracking system is likely more than Ironbridge's current fleet size warrants — a simple sign-out log for small tools would capture most of the value at a fraction of the cost.

Rating: Needs Attention **Impact:** Low **Effort:** Major Undertaking

Technology Usage

Technology utilization

Observation: Ironbridge licenses Procore but uses it primarily for document storage. Scheduling, daily logs, and change order tools are all available but sit largely unused, leaving real functionality on the table.

Recommendation: Run a focused, half-day training session on Daily Logs, Scheduling, and Change Orders specifically — the three tools with the most immediate payoff for this team.

Rating: Needs Attention **Impact:** Important **Effort:** Moderate Effort

Cybersecurity practices & data protection

Observation: The office uses shared logins for QuickBooks and email with no multi-factor authentication in place. Payroll and banking access is not meaningfully separated from general office access.

Recommendation: Enable MFA on email, banking, and accounting logins this month, and move to individual logins for all financial systems. This is inexpensive and fast to implement relative to the exposure it closes.

Rating: Critical **Impact:** Strategic **Effort:** Quick Fix

General Company Practices

SOPs — existence, accessibility, and actual use

Observation: A handful of written procedures exist for safety and onboarding, but most institutional knowledge (bid procedures, closeout steps, material ordering) lives in David's and senior PMs' heads.

Recommendation: Start with the 3-4 highest-value SOPs (closeout, change order documentation, estimating handoff) rather than trying to document everything at once.

Rating: Adequate **Impact:** Low **Effort:** Quick Fix

Employee retention & turnover patterns

Observation: Apprentice-level turnover is notably higher than journeyman-level turnover, and exit conversations suggest unclear advancement timelines are a bigger factor than pay.

Recommendation: Build a documented apprentice-to-journeyman advancement path with clear milestones, paired with a real mentorship structure — this addresses both a retention risk and the succession gap noted above.

Rating: Needs Attention **Impact:** Strategic **Effort:** Major Undertaking

Internal communication & feedback loops

Observation: There is no regular, structured way for field employees to raise concerns or ideas to leadership outside of informal conversations, which means good field-level insight often doesn't reach ownership.

Recommendation: Start a brief monthly all-crew huddle (15-20 minutes) plus a simple anonymous suggestion channel — low-cost, high-visibility changes.

Rating: Adequate **Impact:** Important **Effort:** Quick Fix

Recognition & morale practices

Observation: Crews consistently mentioned feeling appreciated, citing the company's annual cookout and spot bonuses for jobs completed ahead of schedule.

Recommendation: No action needed — a genuine strength worth preserving as the company grows.

Rating: Strong **Impact:** Low **Effort:** Quick Fix

Prioritized Action Plan

This plan combines all three scores from the evaluation. Findings rated **Critical** are called out first regardless of effort, since they carry active risk. Everything else is plotted by **Impact** and **Effort** to show where the best return on attention actually is.

Immediate Priorities — Critical Findings

Address these first, regardless of effort required — active risk or cost exposure.

- Estimating accuracy & use of historical cost data — recent jobs averaging 14% over estimated labor cost.
- Change order process & documentation — an estimated \$60-80K in unbilled change work over the past year.
- Project closeout & punch list completion process — closeouts running 60-90 days late, delaying retainage.
- Cybersecurity practices & data protection — no MFA on financial systems; shared logins in use.

The Impact / Effort Matrix

Every non-critical finding, plotted by how much it would help versus how hard it would be to fix.

Quick Wins <i>High Impact / Low Effort</i> Do these first — strong return for minimal investment. • Scheduling practices & schedule adherence — weekly update discipline • Internal communication & feedback loops — monthly crew huddle	Major Projects <i>High Impact / High Effort</i> Plan and resource these deliberately — big bets worth the investment. • Succession planning & leadership bench strength • Employee retention & turnover patterns — apprentice advancement path
Fill-Ins <i>Low Impact / Low Effort</i> Nice to have — tackle when time and resources allow. • Crew productivity tracking — add estimate-vs-actual to existing report • SOPs — document the top 3-4 highest-value procedures first	Reassess <i>Low Impact / High Effort</i> Deprioritize unless circumstances change. • Equipment & material management — a full asset-tracking system isn't justified by current fleet size; a simple sign-out log covers most of the value

Next Steps

As this report shows, there is real opportunity for improvement. The guiding question to ask of every recommendation is whether addressing it will provide genuine value — measured in accountability, risk management, efficiency, scalability, or consistency.

The fastest, highest-value place to start is the Immediate Priorities section — closing the change order and cybersecurity gaps alone should pay for this evaluation many times over within the first year. From there, the estimating and cash flow forecasting work would meaningfully increase visibility heading into larger projects. Given the succession and retention findings, it may also be worth a conversation about Brookcal's Strategic Planning and Leadership Development services as a longer-term follow-on.

We're glad to walk through any part of this report together, and to help however makes the most sense for Ironbridge Electrical Contractors going forward.