

Unified Documentation Review

Version 1.0 | October 5, 2026

Review scope

Seven fictional playbooks/SOP packs cross-referenced to the current dashboard task calculations, Customer Experience account calculations, source sanitation, documentation routes and refresh instructions. This is a documentation and implementation review, not validation of real client outcomes or regulatory compliance.

Completion

All seven verticals now have playbooks, SOPs, working templates and metric definitions. Six industry packs each contain five SOPs and four templates; Customer Success retains its more extensive nine-procedure pack, service templates and account examples. Healthcare and Construction & Field Service are newly completed. The five prior packs are retained with their existing version labels; this review provides a shared interpretation and administrative handoff.

Evidence reviewed

dist/live.js: task calculations and missing-field display. dist/cx.js: account analytics and pipeline story. worker/index.js: allowed boards, data sanitation, snapshot publishing and routes. dist/index.html: tabs, labels and links. Existing PDF text and content sources: procedures, worked examples and limits. Refresh instructions: cadence, idempotency and board/account safeguards.

Result and corrections

Metric definitions and worked examples align with the implemented logic. Construction subtitle is corrected to task progress, scope exceptions and budget; it previously implied safety and cost-to-complete calculations. All seven tabs now expose their relevant pack. A shared documentation hub includes this review and handoff.

Acceptance boundary

SOP approval, severity, SLA, capacity and outcome evidence live in mock exercise logs/templates unless dedicated sources are added. Publishing these documents does not enable those automations or make task closure proof of a business outcome.

Seven-Vertical Cross-reference

Each pack distinguishes implemented signals from additional evidence needed.

Financial Planning

Task/workstream completion, dates, matched budget/spend and gaps are implemented. Advice decisions, assets under management, investment performance and real financial outcomes are not calculated. The cost example uses $\$7,500/\$12,000 = 62.5\%$, rounded to 63%; the task with missing spend is excluded from comparable utilization.

Manufacturing

Production coordination tasks, workstream progress and synthetic cost exceptions are implemented. OEE, yield, downtime, supplier performance and safety outcomes require separate event-level sources. Sample matched costs use $\$13,000/\$20,000 = 65\%$; a \$10,000 budget with unknown spend is excluded from the matched set.

SaaS Development

Task status, delivery workstream, dates and project cost are implemented. Release quality, deployment frequency, defect escape, usage and commercial results need additional evidence. Sample matched costs use $\$32,000/\$50,000 = 64\%$; a remaining-cost estimate is a separate worksheet input, not a dashboard forecast.

Healthcare

Nonclinical administrative coordination only. Task and cost measures do not establish care delivery, appointment availability, no-show rates, clinical severity or compliance. New SOPs require mock acceptance evidence and keep missing coverage/confirmation results unknown.

Managed IT Services

Delivery tasks, Stuck status, due-date distribution and costs are implemented. Contractual SLA clocks, engineer utilization, margin and account-risk scoring are proposed capabilities. Customer Success account analytics do not become MSP analytics merely because both appear in the portfolio.

Construction & Field Service

Readiness, handoffs, materials exceptions and scope/cost review are mock procedures. Task data does not authorize dispatch, certify safety or engineering, or estimate final job cost. A separate remaining-cost estimate is required for a forecast.

Customer Success Journey

Stages are Onboarding, Adoption, Value Realization, Renewal and Expansion. Task-stage closure is separate from account first-value evidence. Account cohort, health, adoption, enablement, survey, renewal and retention measures are implemented with explicit missing-data limits. The \$100K-to-\$1M growth story is illustrative and separate from cohort ARR.

Shared Task Metric Contract

Applies to all seven boards; dates and incomplete amounts affect interpretation.

Record population

Only unarchived DEMO | tasks on the seven allowed boards belong in the demo. Open = total minus Done. Completion = Done/total, rounded. Needs attention counts Stuck only; review overdue open tasks separately. None of these measures weights hours, dollars or business value.

Cost basis

Reported totals sum known amounts and disclose missing values. Comparable utilization = matched spend/matched budget for tasks with both values. Matched remaining budget = matched budget minus matched spend. Open-task budget is not cost to complete. Unknown amounts stay null/blank and must not be imputed as zero.

Zero denominator

The general task UI currently falls back to 0% at zero matched budget; interpret the ratio as undefined. Customer Success comparable-cost reporting uses Not measured for a zero denominator. This difference is disclosed rather than treated as a financial result.

Chart selection

Progress uses the three largest workstreams by task count. Cost comparison uses the three largest by reported budget. These may select different groups. Upcoming work uses six due-date buckets beginning Monday of the current UTC week, includes Done tasks and excludes undated/out-of-window rows. It is not a historical trend or capacity forecast.

Completeness and closure

Completeness checks Status, Workstream (Journey Stage for Customer Success), Next Action, Due Date, Budget and Actual Spend. A populated value is not evidence of accuracy or acceptance. Refresh policy requires fields before Done; API sanitation is not a substitute for full procedural review.

Example and recovery

Budget A \$50,000, spend A \$32,000; budget B \$20,000, spend B unknown. Reported budget \$70,000, known spend \$32,000, matched utilization 64%, matched remaining \$18,000. Add an independently supported remaining estimate \$22,000 to A and its forecast becomes \$54,000; the dashboard does not derive this estimate.

Customer Experience Metric Contract

Fixed opening cohort and evidence coverage take precedence over convenient totals.

Cohort and revenue

The opening cohort is January 1, 2026: 12 fictional accounts, 10 active and two churned. Preserve membership, opening ARR and churned history. Current ARR = opening ARR minus churn minus contraction plus expansion, nonnegative. Retention uses financially complete rows and discloses excluded evidence. ARR is not cash collected or recognized revenue.

Retention and health

GRR excludes expansion; NRR includes expansion. Health below 60 is Risk, 60-79 Watch, and at least 80 Healthy. Missing health is Unscored. Product adoption and training/enablement summaries use reported active-account values; these are not weighted revenue scores.

Surveys and first value

CSAT is total positive responses divided by total responses for valid active-account evidence. Positive responses cannot exceed responses. Missing survey evidence is excluded and disclosed. First-value summary is the median measured active-account result; a missing result is not a completed milestone and stage advancement is not first value.

Renewals and readiness

Renewal buckets use the account snapshot date: Overdue, 0-30, 31-60 and 61-90 days; missing dates are separate. Expansion readiness requires health at least 80, adoption at least 75, enablement at least 80 and measured open escalations at most one. This illustrative rule is not a revenue forecast.

Growth disclaimer

The \$100K-to-\$1M example illustrates a possible scenario and is not calculated from the 12-account cohort. Growth depends on market conditions, demand, pricing, product fit, delivery quality, retention, customer adoption, sales execution and other factors. No result is guaranteed. Never present expansion readiness as achieved expansion.

Data safeguards

Scores stay within 0-100, counts/amounts nonnegative, and one active account retains clearly labeled missing health, renewal or survey evidence. Change revenue components only for an explicitly described simulated financial event. Do not repeatedly invent expansion, reactivate churned accounts or manufacture survey/first-value evidence.

Administrative Handoff and Refresh Recovery

For the approved demo only. This document includes identifiers, never credentials.

Allowed sources

Workspace 17712588. Task boards: Financial Planning 18432851024; Manufacturing 18432851032; SaaS Development 18432851033; Healthcare 18432851028; Managed IT Services 18432949710; Construction & Field Service 18432949720; Customer Success Journey 18433910956. Account board 18433916893 is a fixed 12-record cohort. Never touch actual client/personal work.

Safe mutation sequence

Inspect schema, rows, recent activity and DEMO CYCLE local-date morning/midday/afternoon markers. Skip already-applied changes. Advance 2-3 eligible tasks per board and 2-3 active accounts with plausible synthetic evidence. Resolve one missing field while retaining 2-4 deliberate task-gap examples per board and one active-account evidence gap. Read back changed values.

Task-count policy

Keep 20-30 unarchived fictional tasks and at least six open per board. Create at most one unique industry task per board per local day. At 30, archive an older completed DEMO task before creating. Never reopen Done work. The account board is exempt from task-count/new-task rules.

Publish and verify

Run existing on-demand Make scenario 6508488, team 1153801, us2.make.com, with no inputs once after all writes. If pending, inspect that execution ID. Verify result.data.source is synced, asOf is recent, items includes Customer Success tasks, accounts contains the 12 records, accountSource is synced and accountAsOf is recent. A failed readback is not success.

Recovery

Failed sync: retain verified Monday writes and retry only publication. Unknown execution state: inspect the existing execution rather than launch another. Stale UI: compare API timestamps and source flags, reload, then inspect publisher execution. Do not replace an unavailable snapshot with fabricated zero values. Report the exact failing stage and preserve evidence.

Deployment and cadence

Routine data refreshes do not rebuild the Site. Browser polling is approximately 60 seconds, separate from weekday demo updates at 9:10, 12:10 and 16:10 Eastern. Documentation changes regenerate PDFs/HTML, rebuild and test the Worker, push the exact source, save a version and deploy with existing public access. A code rollback must preserve the current stored snapshot; it does not undo board writes.

Maintenance, Validation and Next Build Scope

Keep documentation and operational reality synchronized.

Change control

Record document version/date, reviewer, changed fields/formulas and affected SOPs. Recheck sample arithmetic, missing/zero behavior, source coverage, all seven tab links, HTML/PDF routes and PDF legibility. Regenerate files from committed content scripts; do not edit a PDF without updating its source.

Validation completed

New Healthcare and Construction PDFs were rendered and visually reviewed in full. Existing pack definitions and examples were cross-referenced to implementation. Worker route and analytics regression checks cover the seven tabs, documentation HTML/PDF responses and sync/account safeguards. This review does not assert real integrations were exercised or that mock procedures are production controls.

Useful next work

Historical trends need dated snapshots and consistent denominators. MSP SLA/capacity reporting needs case-clock rules, labor hours and availability sources. Healthcare access and manufacturing quality need dedicated event records. Field forecasts need approved scope, commitments and remaining estimates. Add each only after a metric dictionary and source contract exist.

Deployment record

The source commit and publication outcome accompany delivery. All packs are accessible from the documentation hub and each relevant dashboard tab. Google Drive contains the PDFs, index, this review and a source-inclusive archive. Sharing permissions remain under the owner's control.

Final interpretation

Use this portfolio to demonstrate coordination, transparent data gaps, accountable handoffs and synthetic analytics. Treat suggested operational measures as future capabilities until sources and calculations are implemented. Mock role names describe responsibilities and do not assert real staff, customer outcomes or approvals.