

Service Delivery and Account Operations

GCom Pro | Version 1.0 | October 5, 2026

Purpose. Turn delivery signals into clear decisions, accountable work and verifiable outcomes. This pack covers triage, service reviews, staffing decisions, change handoffs and account risk.

Use this pack. Start with the metric definitions. Select the relevant SOP, record evidence in the mock operating log and verify the task in Source data. Supporting templates are included for escalation, service review, capacity and project economics.

Demonstration boundary. Fictional portfolio demonstration. Roles, targets, records and examples are illustrative. No real ticket handling, customer communication, system changes or contractual service commitments are authorized by this playbook.

Current capabilities. The MSP tab reports fictional tasks, statuses, workstreams, due dates, budgets and actual spend. It does not calculate contractual SLA performance, engineer utilization, account health, renewal revenue or project profit.

Document control. Mock owner: Service Delivery Manager. Status: demonstration draft. Review quarterly and whenever fields, calculations or operating rules change. A reviewer should trace each metric to the source and record the review date before adoption.

Contents. Operating rhythm and roles • Dashboard metric dictionary • SOP 01 Ticket triage and escalation • SOP 02 Service-level review • SOP 03 Engineer capacity allocation • SOP 04 Project and change handoffs • SOP 05 Account risk and renewal review • Four working templates.

Operating rhythm and responsibilities

A mock human operating model; publishing this document does not enable new automations.

Daily delivery review. Service Delivery Manager checks freshness, Stuck tasks, overdue open work and missing fields. Select up to three priorities, assign accountable roles and record the next review. Due-date reviews require inspecting the source; the Needs attention card counts Stuck tasks only.

Weekly service review. Service Delivery Manager reviews delivery exceptions and budgets with the Technical Lead and Account Manager. Separate verified measures from proposed SLA, labor or commercial measures. Record decisions and follow-up dates.

Monthly account review. Account Manager reviews service evidence, sponsor concerns and renewal actions. Finance Reviewer validates any commercial calculations. No MSP account-health score or renewal forecast is generated by this dashboard.

Ownership. Service Analyst owns intake until handoff acceptance. Technical Lead owns technical assessment and staffing proposals. Change Owner owns scope, approvals and rollback evidence. Service Delivery Manager owns prioritization and escalations. Account Manager owns relationship follow-up. Data Steward owns reconciliation.

Operating log. Record task reference, accountable role, evidence, decision, timestamp, next action and next review. Use a mock task update or separate exercise log for severity, approvals and timestamps: these are not dedicated MSP dashboard fields.

Demo refresh rules. Only approved DEMO | records are eligible. Maintain 20–30 unarchived tasks, at least six open and 2–4 labeled data-gap tasks. Never reopen Done work. Keep unknown values blank. Inspect cycle markers before retries, read back writes and retry failed publication without repeating successful changes. Browser polling is not a continuous event stream.

Dashboard metrics and evidence

Definitions below describe the implemented MSP task dashboard.

Open work and completion. Open work = all DEMO | tasks minus Done tasks. Completion = Done / total tasks, rounded to a percentage. Active status grouping excludes Done and Stuck. Completion is task count based, not weighted by hours, budget or business value.

Needs attention. Counts Stuck tasks. It does not include every overdue task, incident or at-risk client. The attention signal selects a Stuck task by due date, with undated work last.

Budget and spend. Reported totals sum available values, with missing counts disclosed. Comparable utilization = matched spend / matched budget on rows containing both amounts. Remaining matched budget = matched budget minus matched spend. Neither represents margin or a forecast cost to complete. A missing amount is not zero; a zero denominator cannot establish utilization.

Workstream charts. Progress shows Done / task count for the three largest workstreams by task count. Cost comparison shows the three largest workstreams by reported budget. Different chart selections and incomplete amounts can explain apparent differences.

Due-date distribution. Six weekly buckets begin with Monday of the current UTC week. Tasks are grouped by due date regardless of status, including Done. Undated and out-of-window tasks are excluded. This is neither a historical completion trend nor an engineer-capacity forecast.

Data completeness. Checks Status, Workstream, Next Action, Due, Budget and Actual Spend. A filled field is not proof of accuracy or acceptance. Deliberate missing-field examples remain labeled and visible.

Proposed capabilities. SLA attainment needs case timestamps and contractual clock rules. Capacity needs planned hours and availability. Margin needs revenue and a complete cost basis. Account risk and renewal reporting need account-level evidence and dates. The Customer Success account cohort is separate and is not MSP data.

SOP 01 | Ticket triage and escalation

Owner: Service Analyst; Service Delivery Manager accountable

Trigger. New fictional request, a changed impact or a blocked service task.

Inputs. Task history, impact evidence, service scope and an identified accountable role.

1. Check duplicates and scope. Find the existing DEMO | task. Reuse it if the same issue is still open. Record the affected fictional service, impact and evidence; no real customer data.

2. Classify the impact. Use the escalation template. Record severity and rationale in the mock log. Do not infer severity from revenue or task budget.

3. Assign and acknowledge. Record the receiving role, immediate next action and due date. Keep accountability with the sender until the receiving role accepts. Retain any customer acknowledgment as a mock draft.

4. Escalate blockers. Use Stuck when a named dependency prevents progress; record its owner and next decision. For urgent impact, assign the mock incident lead and next update time.

5. Validate resolution. Compare evidence with original acceptance criteria. Complete only after acceptance and all six required task fields are present. A workaround may leave follow-up work open.

Exception. If impact or timing is unknown, record the uncertainty and escalate for assessment. Never substitute a due date for a measured response timestamp.

Completion evidence. Unique task reference, impact rationale, accepted owner, action/date and resolution evidence or an explicit open blocker.

Dashboard connection. Status, open work, Stuck count and completeness; no measured response or resolution SLA.

SOP 02 | Service-level review

Owner: Service Delivery Manager

Trigger. Weekly mock review or a reported missed commitment.

Inputs. Task source data, prior decisions and, if supplied, a separate mock case log and service agreement.

1. Confirm freshness. Check source and as-of timestamp. Treat stale or fallback data as provisional and record the limitation.

2. Review delivery exceptions. Inspect Stuck and overdue open tasks, missing information and workstream progress. Distinguish blocked work from measured SLA breaches.

3. Validate any SLA calculation. Only with case-level evidence: define eligible cases, service hours, time zone, paused clock rules, target and exclusions. Preserve received, response and resolution timestamps.

4. Reconcile the denominator. Calculate compliant eligible cases / eligible cases for the specified metric and period. Unknown evidence is unmeasurable, not compliant. Disclose coverage separately; zero eligible cases means not applicable.

5. Record corrective actions. Use the service review template. Assign owners and dates for recurring issues; verify actions at the next review without claiming a trend from a single snapshot.

Exception. Without the additional case records, report SLA performance as not measured. Do not label task completion or due-date compliance as contractual attainment.

Completion evidence. Dated review with coverage, supported findings, decisions, assigned actions and next review date.

Dashboard connection. Task progress and budget measures are implemented. Contractual SLA calculations are proposed and remain in the mock log.

SOP 03 | Engineer capacity allocation

Owner: Technical Lead; Service Delivery Manager approves priorities

Trigger. Weekly planning or an overload/dependency signal.

Inputs. Open work, priorities, skill requirements and a separately prepared capacity worksheet.

1. Establish available hours. For each mock role and week, record scheduled hours less leave, existing commitments and a stated contingency allowance. Do not subtract the same commitment twice.

2. Estimate demand. Record remaining effort, required skills, dependencies and confidence per work item. A task count or budget is not an estimate of engineering hours.

3. Compare demand and capacity. Allocate by role and week. $\text{Planned load} = \text{allocated hours} / \text{net available hours}$. Zero availability with demand is a coverage gap; blank availability means unknown.

4. Resolve over-allocation. Propose moving work, changing sequence or assigning a suitably qualified mock role. Record the effect on dates and acceptance of the revised plan.

5. Update delivery records. Read back changed dates, status and next actions. Keep acceptance decisions and hours in the worksheet; do not imply that the task dashboard calculates labor utilization.

Exception. If estimates or calendars are missing, mark the plan provisional and obtain evidence. Urgent work displaces other work only through an explicit prioritization decision.

Completion evidence. Balanced or explicitly escalated weekly plan with role, hours, dependencies, priority decision and review date.

Dashboard connection. Due-date distribution supports scheduling discussion only. Planned load and actual billable utilization require additional records.

SOP 04 | Project and change handoffs

Owner: Change Owner with Technical Lead acceptance

Trigger. A deliverable moves between roles or a fictional change reaches a decision gate.

Inputs. Scope, acceptance criteria, dependencies, budget/spend and a mock change record.

1. Define readiness. Document scope, affected fictional services, proposed window, acceptance criteria, owner and receiving role. Identify unresolved dependencies.

2. Review cost and risk. Inspect paired budget/spend and missing amounts. Estimate remaining cost separately if possible. Record risk, contingency and approval authority in the mock log.

3. Prepare the handoff. Include validation steps, mock rollback plan, decision checkpoints and communication draft. Any real production action is outside this demonstration.

4. Accept or reject readiness. Receiving role acknowledges ownership. Missing critical evidence blocks the handoff; preserve the blocker and next action rather than marking Done.

5. Validate and close. Record simulated test results and acceptance. Reconcile spend with evidence, keep follow-ups owned and mark Done only when required fields and completion evidence are present.

Exception. Unapproved scope or absent rollback evidence keeps a change pending. Missing spend remains unknown; remaining budget does not prove sufficient funding.

Completion evidence. Accepted handoff, recorded approval decision, mock validation/rollback evidence, reconciled costs and owned residual actions.

Dashboard connection. Project status and budget comparison are implemented. Forecast-to-complete and profit require the separate economics worksheet.

SOP 05 | Account risk and renewal review

Owner: Account Manager; Finance Reviewer for commercial decisions

Trigger. Monthly mock review or a service concern with potential relationship impact.

Inputs. Linked task evidence plus a separate fictional account record with renewal timing and commercial context.

1. Establish the account record. Record fictional account reference, owner, renewal date and evidence date. Missing renewal timing is unknown; never borrow dates from the Customer Success cohort.

2. Assess evidence. Review unresolved service issues, delivery commitments, sponsor feedback and value evidence. Describe risks and hypotheses separately; a Stuck task is not an account-health score.

3. Create the recovery action. Assign a specific outcome, accountable role and review date. Link the existing task and define acceptance evidence.

4. Review renewal readiness. Validate the contract timeline and outstanding issues. Record a mock next step. Treat proposed expansion as an opportunity, not committed revenue or a guaranteed result.

5. Confirm the outcome. Review recovery evidence and record any mock commercial decision with explicit approval. Preserve history and verify source task updates; do not invent account-level financial changes.

Exception. Without account and contract evidence, describe the risk qualitatively and keep renewal value unmeasured. Growth depends on customer needs, execution, pricing, retention, market conditions and other factors.

Completion evidence. Dated account review with evidence, unknowns, owner, recovery outcome, renewal next step and review date.

Dashboard connection. Supports Client Health and Renewals workstreams as task categories. MSP health scores, ARR and renewal forecasts are not implemented.

Templates | Escalation and service review

Copy these structures into a mock operating log. Targets below are illustrative, not contractual.

Escalation matrix. P1: widespread critical service loss with no workaround → mock incident lead; immediate triage, proposed updates every 30 minutes. P2: significant degradation or limited workaround → Technical Lead; proposed hourly updates. P3: limited impact → Service Analyst; next business-day review. P4: planned request → backlog owner; agree a date. Record severity rationale and agreed cadence for each case.

Escalation record. Case/task reference: ____ | Impact and evidence: ____ | Severity/rationale: ____ | Accountable role: ____ | Received timestamp/time zone: ____ | Next update: ____ | Dependency owner: ____ | Decision/approval: ____ | Acceptance evidence: ____

Service review agenda. Period and snapshot timestamp → prior actions → blocked/overdue work → missing evidence → budget exceptions → supported service measures → decisions and owners → next review.

Service review record. Review date/owner: ____ | Source and freshness: ____ | Metric/definition: ____ | Eligible population: ____ | Measured records: ____ | Unknown/excluded records and reasons: ____ | Finding: ____ | Action/owner/due: ____ | Decision evidence: ____

Illustrative SLA calculation. A mock log contains 20 eligible cases: 16 measured on time, 2 measured late, 2 with missing evidence. Measured attainment = $16/18 = 88.9\%$; evidence coverage = $18/20 = 90\%$. Do not count unknown cases as compliant. If a contract requires another denominator, document and follow that rule instead. This calculation is not a dashboard feature.

Templates | Capacity and project economics

Additional records are needed for these worksheets; all worked values below are fictional.

Capacity worksheet. Week: ____ | Role/skills: ____ | Scheduled hours: ____ | Leave: ____ | Existing commitments: ____ | Contingency: ____ | Net available: ____ | Proposed allocation: ____ | Load: ____ | Displaced work/approval: ____ | Review date: ____

Capacity example. 40 scheduled – 8 leave – 6 existing commitments – 4 contingency = 22 net available hours. Proposed new allocations of 26 hours imply 118.2% planned load and a 4-hour gap. Move or reassign four hours through an approved mock decision. This is planned load, not actual billable utilization.

Project economics worksheet. Project/task: ____ | Period and cost basis: ____ | Approved budget: ____ | Actual cost to date: ____ | Estimated remaining cost: ____ | Forecast total cost: ____ | Approved project revenue: ____ | Forecast margin: ____ | Missing evidence: ____ | Decision/owner: ____

Economics example. Budget \$30,000; actual cost \$18,000; remaining estimate \$8,000; approved revenue \$40,000. Forecast cost = \$26,000; forecast budget headroom = \$4,000; forecast margin = $(\$40,000 - \$26,000)/\$40,000 = 35\%$. Actual remaining budget of \$12,000 is a different measure. The example assumes a complete and consistent cost basis; dashboard spend alone does not establish it.

Unknowns and controls. If revenue or cost evidence is missing, leave margin uncalculated. Zero revenue has no meaningful margin percentage. Avoid double-counting labor, vendor charges or commitments. Record period, assumptions and reviewer; forecast results are estimates, not promises.

Logic review checklist. Confirm chart label and formula → identify required source fields → test one complete example → test one missing-value example → check denominators and date boundaries → reconcile source/readback → record reviewer and document version. Treat any proposed measure as unimplemented until its data model and calculations are verified.