

# Scorecard Report

## Pinnacle Consulting Group

Management consulting and advisory

14

Total measurables

64%

Leading indicators

### Recommended Measurables

#### MEASURABLE 1

LEADING

### Discovery Calls Held with Prospective Retainer Clients

#### OWNER

Sales Lead

#### WEEKLY GOAL

8 discovery calls per week (estimated baseline - set your real target after week one of tracking)

#### WHY IT MATTERS

Landing 3 new retainer clients this quarter requires a consistent top-of-funnel rhythm. Without weekly visibility into discovery activity, the quarterly goal becomes a hope rather than a plan.

#### MEASURABLE 2

LEADING

### Proposals / SOWs Sent

#### OWNER

Sales Lead

#### WEEKLY GOAL

3 proposals sent per week (estimated baseline - set your real target after week one of tracking)

#### WHY IT MATTERS

For a consulting firm chasing 3 retainers in 13 weeks, proposal velocity is the most controllable predictor of closes. If proposals stall, the quarterly goal is already at risk.

#### MEASURABLE 3

LAGGING

### New Retainer Clients Signed (Quarter-to-Date)

#### OWNER

CEO

#### WEEKLY GOAL

Track progress toward 3 retainer clients this quarter - monitor weekly

#### WHY IT MATTERS

This is the company's explicit quarterly goal. Keeping it visible weekly forces the leadership team to react before the quarter ends rather than after.

MEASURABLE 4

LAGGING

## Billable Utilization Rate (Firm-Wide)

OWNER

COO / General Manager

WEEKLY GOAL

75% billable utilization

WHY IT MATTERS

This is the company's stated top operating goal. Tracking it weekly creates the early warning needed to redeploy consultants before a quarter of slack utilization erodes margin.

MEASURABLE 5

LEADING

## Project Health Check-Ins Completed

OWNER

Customer Success Lead

WEEKLY GOAL

100% of active engagements receive a structured weekly health check (Green / Yellow / Red)

WHY IT MATTERS

The company explicitly said it loses track of project health mid-engagement. A mandatory weekly status pulse on every project is the single highest-leverage fix for that problem.

MEASURABLE 6

LAGGING

## Projects Flagged Yellow or Red

OWNER

Customer Success Lead

WEEKLY GOAL

Your team sets this baseline in week one

WHY IT MATTERS

Surfacing at-risk engagements every Monday is the antidote to the stated problem of satisfaction dropping before leadership notices. A visible count forces an intervention conversation in the weekly meeting.

MEASURABLE 7

LEADING

## Proactive Client Touches by Engagement Lead

OWNER

Customer Success Lead

WEEKLY GOAL

1 proactive touch per active client per week (estimated baseline - set your real target after week one of tracking)

WHY IT MATTERS

Satisfaction rarely drops without prior signal - but only if someone is talking to the client. A consistent touch cadence is the cheapest insurance against the "didn't know there was a problem" failure mode.

MEASURABLE 8

LEADING

## Invoices Issued Within 48 Hours of Milestone

OWNER

Finance / CFO

WEEKLY GOAL

100% of milestone-triggered invoices issued within 48 hours

WHY IT MATTERS

In consulting, billing delays bleed cash and signal sloppy operations to clients. This is the cleanest leading indicator of healthy collections.

MEASURABLE 9

LAGGING

## Accounts Receivable Over 30 Days

OWNER

Finance / CFO

WEEKLY GOAL

Your team sets this baseline in week one

WHY IT MATTERS

Aging AR is the most common silent killer for small consulting firms. Weekly visibility forces collection action before balances become uncollectible.

MEASURABLE 10

LEADING

## New Client Onboarding Milestones Completed On Time

OWNER

COO / General Manager

WEEKLY GOAL

100% of week-one onboarding milestones completed on schedule for new engagements

WHY IT MATTERS

A clean onboarding is the strongest predictor of long-term retainer health. Stumbling in the first two weeks is when satisfaction quietly starts to erode.

MEASURABLE 11

LEADING

## Active Candidates in Recruiting Pipeline

OWNER

HR / People Lead

WEEKLY GOAL

5 qualified candidates actively in pipeline (estimated baseline - set your real target after week one of tracking)

WHY IT MATTERS

Hitting 75% utilization with consistent retainer growth requires bench capacity. A dry pipeline becomes a hiring crisis exactly when new work lands.

MEASURABLE 12

LEADING

## Knowledge Assets Published or Updated

OWNER

COO / General Manager

WEEKLY GOAL

2 knowledge assets published or materially updated per week (estimated baseline - set your real target after week one of tracking)

WHY IT MATTERS

Knowledge management is a named core process, and for a consulting firm it is the difference between scaling expertise and re-inventing every engagement. Without a weekly cadence it gets crowded out by billable work.

MEASURABLE 13

LEADING

## Consultant Time Entries Submitted On Time

OWNER

HR / People Lead

WEEKLY GOAL

100% of consultants submit time by Monday 10am for prior week

WHY IT MATTERS

Utilization data is only as good as the time entry behind it. Without on-time submission, the 75% utilization goal cannot be managed in real time.

MEASURABLE 14

LAGGING

## Sales Pipeline Value - Qualified Stage

OWNER

Sales Lead

WEEKLY GOAL

Your team sets this baseline in week one

WHY IT MATTERS

A weekly read on qualified pipeline value tells leadership whether the retainer goal is feasible based on coverage, not just hopeful activity counts.

## Overall Observations

- › The scorecard is appropriately weighted toward leading activities, giving leadership the forward visibility they currently lack mid-engagement.
- › Three measurables directly attack the stated problem of project health going dark — weekly health check-ins, projects flagged yellow/red, and proactive client touches form a tight early-warning system.
- › The 75% utilization and 3-retainer goals are both visible on the card, but each is paired with the weekly leading activities (proposals, discovery calls, time entry compliance) that actually drive them.
- › Ownership is well distributed across all six leadership seats — no one carries more than three metrics, which keeps the weekly meeting accountable rather than concentrated.
- › Two genuinely monthly/quarterly outcomes (retainers signed, AR aging) remain on the card with monitoring instructions plus their weekly drivers — exactly how compound outcomes should be tracked.

## Blind Spots & Critical Success Factors

- › Client satisfaction itself (CSAT or NPS) is not on the weekly card because it cannot meaningfully move in 7 days — but the firm should run a structured pulse survey at engagement midpoint and close, and add scores to a monthly review.
- › Definitions matter: "billable utilization" needs a written formula (target hours / available hours, excluding PTO) agreed by COO and Finance before week one, or the number will be debated weekly.
- › Project Green/Yellow/Red criteria must be defined in writing — otherwise health check-ins become opinion rather than diagnosis, and the early-warning system fails.
- › Knowledge asset quality is not measured here, only count. Pair this with a quarterly review of what was published to ensure it's substantive, not check-the-box content.
- › The Sales Lead carrying both activity (calls, proposals) and outcome (pipeline value) is appropriate, but the CEO owning the retainer outcome ensures that if sales activity is green and outcomes are red, leadership-level intervention is triggered, not just sales accountability.