You Set the Rocks.
We Make the *Scoreboard*.

The EOS Implementer Brief — how real numbers reach your client's EOS® meetings, on cadence.

> **The lane, stated plainly:** we don't facilitate sessions, run L10s, or build V/TOs — EOS works because it's run pure, and that's your seat. We implement a **financial** operating system: automated data flows from QuickBooks Online, an analytics layer that captures what QBO can't, and a production cadence of measurables, reports, and forecasts. EOS runs the leadership cadence; the CFO Operating System™ runs the financial data. The integration point is **your meeting**.

THE PROBLEM YOU'VE IDS'D A HUNDRED TIMES

Strong session work — vision shared, Rocks set, L10s humming — and then the Scorecard rots. Measurables show up late, or hand-built in a spreadsheet nobody trusts, or they're lagging vanity numbers because the books can't produce anything better. The V/TO's 1-Year Plan revenue and profit are aspirations untethered from a forecast. And the same cash-or-margin issue returns to the Issues List quarter after quarter — because IDS can identify and discuss all day, but the *solve* lives in the books, and nobody owns the books. That's not an implementation failure. It's an empty Finance seat and a broken instrument — both fixable by us, not by you.

HOW THE NUMBERS GET INTO YOUR MEETINGS

QuickBooks Online, connected live. We connect to the client's QBO through modern AI connections (the Model Context Protocol) and traditional APIs where they fit. Reads are scoped, logged, and governed. We write back too — corrections, reclassifications, dimensional tagging — but only through a policy gate (Open Policy Agent, rules as Rego code): deny-by-default, human approval for anything material, every decision logged with the rule that fired.

Augmented in our PostgreSQL layer. QBO alone can't carry what an EOS Scorecard needs. Our analytics database adds the dimensions QBO lacks: fixed-vs-variable cost behavior, service-line tagging, **per-client profitability**, **job-level costing**, and forecast models — where the measurable your client's business actually runs on gets manufactured.

YOUR CADENCE	WHAT OUR SYSTEM DELIVERS INTO IT
Weekly L10	Scorecard measurables produced from the ledger on schedule — current, consistent, traceable to the rows, so on-track/off-track is a reading, not a debate.
Quarterly	Rock scorecards, trailing-quarter trends per measurable, and an updated rolling forecast under the 1-Year Plan numbers.
Annual	The V/TO's revenue and profit numbers with a real forecast beneath them — defensible 3-Year Picture math instead of aspiration.
Any session, live	Ask-the-books: "which clients were unprofitable last quarter?" answered in-session with the rows attached. We demonstrate it on simulated data before you stake a client on it.

ROCKS, INSTRUMENTED

Financial Rocks fail when they're stated as activities ("implement a budget") with no number attached. We turn every financial Rock into an instrumented bet: a **baseline** at Rock-setting, a **target**, a **weekly measurable** tracking it, and the **rows behind the number** on request. "Improve gross margin to 38%" becomes a line the L10 watches move — and at the Quarterly, done/not-done is read off the ledger, not recalled from memory. The leadership team owns the Rocks; the instrumentation is ours.

THE RIGHT MEASURABLES ARE MODEL-SPECIFIC — AND MOST SCORECARDS MISS THEIRS

Every business model has a **signature question** its books tend to hide — and that question points at the measurable that belongs on the Scorecard:

- **Contractor?** Job-level margin (and retainage outstanding). Most contractor books have no job costing at all — the Scorecard can't carry the number until the books are rebuilt.
- **MSP / recurring services?** Margin per client and contract-level churn. Usually never tracked; great MRR hides money-losing clients.
- **Professional services?** Realization per hour — collected vs stated rate, and unbilled WIP aging.
- **Agency / retainer?** Undelivered-work liability — how much cash on hand is still owed to clients.

When a measurable like this is missing, it's not a discipline problem you can coach — it's a structural absence in the books. We rebuild the accounts so the number falls out weekly. (We prove it with a published benchmark on simulated data — *The Five Questions Test* — showing why no software, including AI, can produce a number the books were never built to record.)

WHAT A REFERRAL LOOKS LIKE — AND WHY IT MAKES YOUR IMPLEMENTATION STICKIER

1. **You spot the signal:** the Scorecard that won't stabilize, the Finance seat nobody GWCs, the cash issue back on the list for a third quarter.
2. **You hand off with one sentence:** "Their financial operating system plugs straight into your EOS cadence — Scorecard measurables on autopilot. Talk to ProjectBits." (Or forward the two-minute Five Questions self-test.)
3. **We start with the Tax Ready Assessment** — fixed scope, plain-language readout, honest timeline to Scorecard-grade numbers. Low commitment for your client; bounded exposure for your name.
4. **Your implementation gets stronger:** measurables stabilize, V/TO numbers become defensible, recurring financial issues leave the list — and the team attributes the traction to the system *you* installed. Companies whose Data Component works renew with their Implementer.

We reciprocate deliberately: our clients who get their books to findings-grade and then ask "now how do we run the *company* better?" are precisely your prospects.

MECHANICS & BOUNDARIES, IN WRITING

- Engagement letters name the lane: financial function and advisory; session facilitation and EOS tools out of scope.
- With client permission, you get the monthly narrative — the same page the leadership team sees — and a standing 90-day check-in on any referred client.
- We serve businesses roughly $500K–$5M (IT/MSP, trades, professional services especially) in Northern Virginia and remote.

THE FIT CHECKLIST — "IS THIS CLIENT A REFERRAL?"

A client likely needs the Finance seat filled if **three or more** apply:

- [ ] Scorecard measurables arrive **late, hand-built, or distrusted** — or financial measurables are placeholders.
- [ ] The **Finance seat** on the Accountability Chart is the owner, an office manager, or empty.
- [ ] The same **cash or margin issue** has hit the Issues List in two-plus consecutive quarters.
- [ ] V/TO 1-Year Plan profit numbers exist, but **no forecast** exists underneath them.
- [ ] **Contractor who can't produce job-level margin**; **MSP that can't name its unprofitable clients**; **agency whose cash includes undelivered work**.
- [ ] Revenue roughly **$500K–$5M**.
- [ ] Tax time is an annual **archaeology project** that hijacks Q1 Rocks.

Not a fit: under ~$300K revenue; already has a true CFO who GWCs the seat; primarily needs tax preparation (we'll route them to the right CPA).

You install the cadence. We make the numbers that feed it.
Start with the client whose Scorecard you've rebuilt twice.

Pressure-test a fit →