LOXWOOD SYSTEMS

Business Systems Health Check

A connected view of the studio you have built

The Health Check brings together the people, processes, information and tools behind everyday work - showing what is working, where pressure is building and where practical change may make the greatest difference.

Willow & Stone Kitchens

Fictional studio · Illustrative example · October 2026

ILLUSTRATIVE EXAMPLE · NOT A COMPLETE HEALTH CHECK

ABOUT THIS ILLUSTRATIVE REPORT

A shortened example of the full Health Check

This report uses a fictional independent kitchen studio and selected example findings. It demonstrates how Loxwood moves from evidence to operational understanding, connects pressures across different parts of the studio and develops practical recommendations.

A completed Business Systems Health Check would provide a substantially deeper, studio-specific assessment across all nine questionnaire areas. Owner Perspective would add context about the owner's priorities and constraints. The completed report would include evidence from the assessment, strengths worth protecting, underlying pressures, cross-area relationships, prioritised recommendations, implementation considerations and likely outcomes.

THE FULL HEALTH CHECK INCLUDES	HOW IT SUPPORTS THE OWNER
Completed structured assessment	Creates a consistent evidence base across nine questionnaire areas
Owner Perspective	Adds priorities, constraints, exceptions and business intent
Interpretation and written report	Connects evidence into strengths, pressures and recommendations
Review conversation	Tests accuracy and supports informed owner decisions

What this example cannot show. A completed report would contain the studio's own evidence, owner context and connected findings. This shortened document demonstrates the method and level of reasoning, rather than the full volume of analysis.

How the Health Check reaches its findings

Scope and method

The Health Check draws on structured assessment responses, owner context, recorded information about current ways of working and patterns that appear across more than one operational area. Loxwood distinguishes between what the studio has reported, what available information records and what Loxwood has inferred.

THE NINE QUESTIONNAIRE AREAS	MATURITY LANGUAGE
1 Leadership & Management 2 Sales & Design 3 Quality & Fit 4 Operational Workflow 5 Communication & Coordination 6 Delivery Visibility 7 Tools & Systems 8 Operational Workload 9 Financial Control	0 None 1 Informal 2 Developing 3 Established 4 Governed Maturity is evidence - not a grade. The useful question is whether the current approach is dependable and appropriate for the studio.

How the structure fits together: The nine questionnaire areas provide the evidence base. Owner Perspective adds context about priorities and constraints. The report presents the connected findings through seven reader-facing sections.

Financial Control: How reliably the studio maintains visibility of commercial performance, follows agreed financial disciplines and understands the commercial consequences of operational decisions. Financial Control considers management information, commercial visibility and financial discipline. It is not an audit of accounts, tax or statutory compliance.

01 · STUDIO OVERVIEW

A capable studio carrying too much in people

Willow & Stone is presented as an established independent kitchen studio with six people, two designers and one showroom. It has traded for twelve years and built a strong local reputation through personal service, experienced design judgement and close owner involvement.

STRENGTHS WORTH PROTECTING	PRESSURES TO UNDERSTAND
Knowledgeable, personal client attention	Lead quality is recorded inconsistently
Strong product and installation judgement	Follow-up depends on individual habits
A team that takes ownership	Handover information varies by designer
Credible repeat and referral business	Exceptions return to the owner
	The overall operating position is hard to see

Owner context

The owner does not want to make the studio feel corporate or remove the personal judgement clients value. The immediate aim is not aggressive growth. It is to make the existing workload easier to manage, reduce preventable interruptions and create enough visibility to decide whether growth would be sensible.

Illustrative maturity snapshot

All scores and supporting observations below are fictional and demonstrate presentation only.

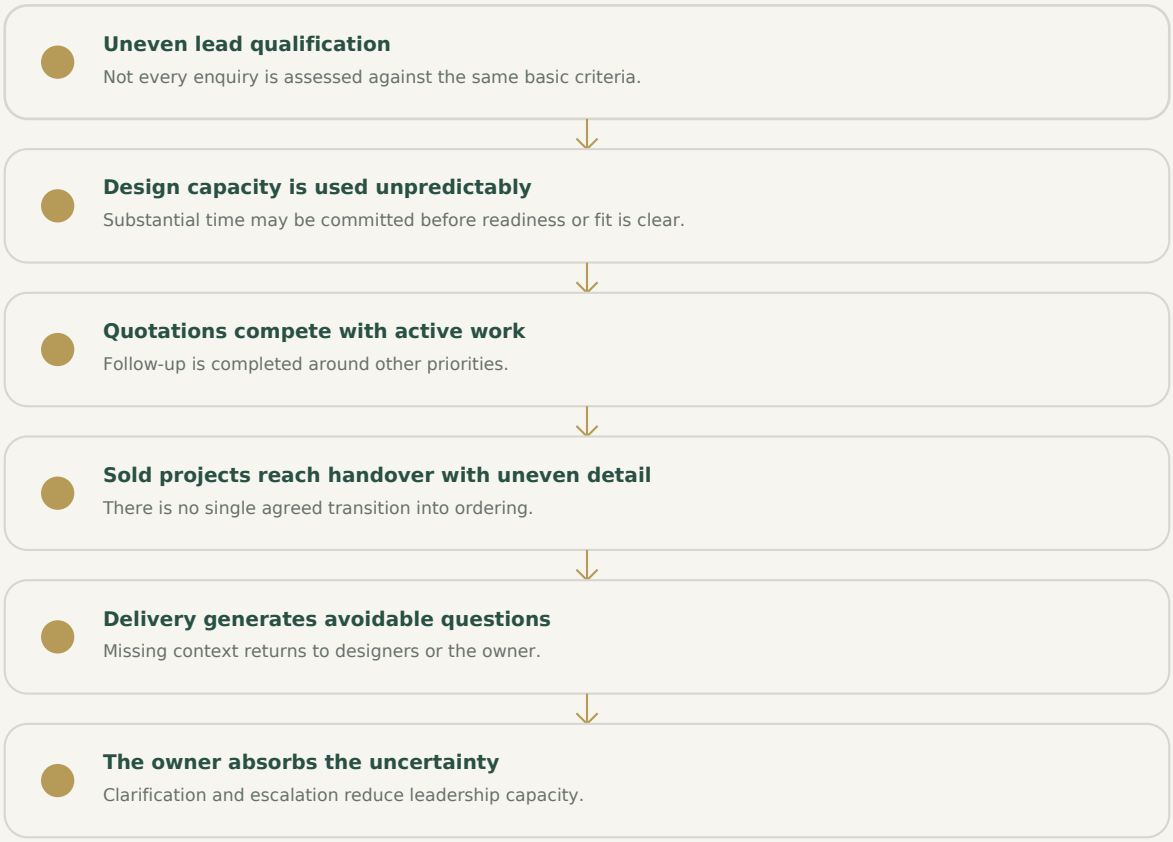


Overall position. Strong professional foundations are being protected by experienced people compensating for gaps between stages. Selective structure - not process everywhere - would make good work easier to repeat.

04 · CROSS-SYSTEM UNDERSTANDING

The pressures do not sit in isolation

The assessment does not present the questionnaire areas as isolated problems. It shows a connected pattern running from the first enquiry through to delivery.



Why this matters

Late follow-up, interrupted designers, repeated questions and owner dependency could be treated separately. The evidence suggests they may share a cause: the studio has not yet agreed when an enquiry earns design time, who owns the next client action and what must be confirmed before ordering.

Secondary finding. Useful information exists in the CRM, project files, inboxes and accounting system, but it is organised around individual tasks rather than management questions. The immediate need is not a new dashboard; it is agreement about the few operational signals worth making reliable.

Finding 01 - Qualification and follow-up are consuming capacity

REF	SOURCE	EVIDENCE	LOXWOOD INTERPRETATION
E-01	Assessment · reported	Readiness, timing and fit are not consistently recorded	Designers may apply different thresholds
E-02	Owner context · reported	Promising opportunities are reviewed informally	Oversight may depend on owner availability
E-03	Workflow · recorded	Next dates sit in calendars, inboxes or memory	Client action is not always team-visible
E-04	Cross-area · inferred	No shared view links status, owner and next date	Position may be reconstructed through conversation

What this suggests

The studio’s personal approach is a strength, but the absence of shared qualification points and visible follow-up makes design capacity difficult to protect. The pressure comes not from a lack of effort, but from each person having to decide and remember the next step independently.

Cross-system relationships

CONNECTION	OPERATIONAL EFFECT
Sales & Design → Operational Workload	Weak qualification increases unpaid design demand
Communication → Delivery Visibility	Inconsistent next actions prevent a dependable opportunity view
Workflow → Quality & Fit	Uneven handover increases checking and clarification
Tools & Systems → Leadership	The owner reconstructs the incomplete shared picture
Workload → Financial Control	Design time is invested without a consistent view of commercial consequence

Confidence, context and owner confirmation

INDICATIVE CONFIDENCE	WHAT WOULD STRENGTHEN IT	ALTERNATIVE EXPLANATION
Moderate. Supported across several questionnaire areas, but not tested against live conversion or time-use records.	Review recent enquiries and quotations, including design time, next actions and outcomes.	A deliberate high-service strategy or market conditions may explain part of the pattern.

This finding would be reviewed with the owner before final inclusion. The useful question is whether the current investment of time is visible and intentional - not whether every enquiry follows an identical route.

Finding 02 - Project quality is protected by interruption

Once a project is sold, required details are present across drawings, emails, supplier notes, meeting records and individual knowledge. Experienced people usually identify what is missing, but the point of discovery varies.

CURRENT OPERATING EFFECT	WHAT IT COSTS
Ordering waits while decisions are checked	Lost momentum and repeated clarification
Designers are interrupted after the sale	Less capacity for active design and clients
Installers receive information at different stages	Greater dependence on interpretation
Changes are harder to trace	More time spent confirming the latest position
Exceptions return to the owner	Routine uncertainty consumes leadership time

Strength to protect

The team’s willingness to take ownership should not be replaced by a rigid checklist culture. The opportunity is to give that ownership a dependable starting point: one agreed handover containing the information needed to move confidently from sold design into ordering and delivery.

Relationship to the primary pattern

Some handover pressure may begin earlier. When decisions and client actions are recorded across different places, important context may already be fragmented by the time the project is sold. A handover template may improve completeness, but not resolve the full pattern unless earlier decisions also become easier to find.

CONFIDENCE	VALIDATION	OWNER QUESTION
Moderate. The assessment indicates variation in where information is stored and when gaps are discovered.	Review three recent sold projects from final approval through ordering and installation preparation.	Which interruptions are preventable, commercially acceptable or inherent to complex bespoke work?

Interpretation: The studio achieves good client outcomes because people intervene, clarify and correct. That strength currently masks the operational cost of the system around them.

Recommendation 01 - Connect qualification, follow-up and handover

Purpose. Introduce a light, shared sequence from qualified opportunity to order-ready project. The aim is not to standardise professional judgement. It is to make ownership, decisions and essential information visible where work changes hands.

WHY THIS COMES FIRST	INDICATIVE VIEW	RATIONALE
Downstream value	High	Touches design capacity, follow-up, handover and owner interruption
Implementation effort	Moderate	Can be tested using existing tools and a few live projects
Dependency	Foundational	Visibility and software depend on agreed information and ownership
Evidence confidence	Moderate	Connected pattern needs owner validation
Reversibility	High	The studio can trial and simplify before wider adoption

Recommended components

01 MINIMUM QUALIFICATION VIEW	02 VISIBLE QUOTATION FOLLOW-UP
Agree the small amount of information needed before substantial design time is committed: project type, broad budget alignment, decision timing, decision-makers and next action.	Every live quotation has an owner, a next date and a clear status, reviewed briefly at a fixed weekly moment.
03 AGREED SOLD-PROJECT HANDOVER	04 SIMPLE EXCEPTION ROUTE
Confirm design decisions, client actions, supplier dependencies, installation assumptions, change history and remaining-task ownership before ordering.	Set thresholds for what the team can resolve, what needs design approval and what genuinely requires the owner.

What remains flexible

The qualification conversation, designer judgement, personal client contact, treatment of unusual projects and choice of tools remain flexible - provided agreed information is visible.

What not to do first

Do not begin by buying a more complex CRM or building a large dashboard. A tool cannot resolve unclear ownership or an undefined handover. Agree the working sequence first, then configure existing tools around it.

A measured first 90 days

PERIOD	FOCUS	ACTIONS, ACCOUNTABILITY & REVIEW
Weeks 1-2	Define	Map enquiry to order-ready; agree “qualified”, “awaiting decision” and “ready for ordering”; record valid exceptions. Accountability: owner sponsors; designer and ordering lead test. Baseline: five opportunities and three handovers.
Weeks 3-4	Test	Trial two or three live projects; assign quotation owners and next dates; hold one short weekly review. Watch: missing fields, repeated clarification and workarounds. Review: retain, change or remove each checkpoint.
Weeks 5-8	Refine	Remove fields that do not support decisions; clarify approvals and exceptions; align documents and current tools. Risk: reproducing fragmented work in a new template. Accountability: named process owner.
Weeks 9-12	Embed	Use the sequence for new opportunities and sold projects. Review four initial signals and team feedback. Decision: continue, simplify or expand; only then consider further tool configuration.

Four signals to review

01	Opportunities without a next action
02	Quotations overdue for review
03	Sold projects not yet handover-ready
04	Unresolved exceptions requiring owner involvement

Indicative effort. This is a focused operating change rather than a software implementation. A real recommendation would be adjusted to the studio’s available time, team roles, tools and appetite for change.

What should feel different

If the recommendation is implemented well, the most immediate improvement should be greater certainty at the transitions between people and stages.

NEAR-TERM OPERATIONAL OUTCOMES	WIDER LIKELY OUTCOMES
Designers know which enquiries are ready for substantial work.	Calmer ownership - fewer routine clarifications require intervention.
Live quotations have visible ownership and next actions.	More usable capacity - less design time is lost to poorly defined opportunities.
Ordering begins with a more consistent information set.	Cleaner handovers - downstream work starts with clearer information.
Missing decisions are identified earlier.	Better decisions - reliable signals replace reconstructed updates.
Routine exceptions reach the right person.	

How progress could be recognised

EVERYDAY SIGNAL	WHAT IT MAY INDICATE
Fewer searches and repeated questions	Information is easier to locate and trust
Fewer unresolved essentials at ordering	Handover readiness is clearer
Fewer quotations without a next action	Commercial ownership is more visible
Fewer routine owner interruptions	Exception routes are working
Greater confidence that work is moving	The shared operating picture is becoming dependable

What cannot be guaranteed

The recommendation cannot guarantee higher sales, eliminate project exceptions or remove the need for professional judgement. Outcomes depend on implementation quality, team participation, market conditions and the choices made by the studio.

The measure of success is not more process. It is less avoidable uncertainty around the expertise and care already present in the business.

07 · CLOSING PERSPECTIVE

A practical order of attention

PRIORITY	FOCUS	WHY NOW
Now	Qualification, quotation ownership and next actions	Protects design capacity and makes commercial work visible
Next	Sold-project handover	Reduces downstream uncertainty and repeated clarification
Then	Approval thresholds and exception routes	Reduces avoidable owner dependency
Develop	Four dependable management signals	Supports decisions once underlying information is reliable

Willow & Stone does not need more noise, more software or process for its own sake.

It needs clearer shared information around the expertise and care that already make the studio valuable. The opportunity is to clarify four practical points: when an enquiry earns design time, who owns the next action after a quotation, what must be confirmed before ordering and which decisions genuinely require the owner.

The next step would be a review conversation to confirm what feels accurate, add missing context and agree which first change is both useful and realistic.

THIS IS AN ILLUSTRATIVE EXTRACT

This is not a complete Business Systems Health Check. A full report examines the studio as a connected operating system and provides additional evidence, findings, relationships and recommendations specific to that business. It covers all nine questionnaire areas in greater depth and reflects the owner’s priorities, constraints and judgement.

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