

Case Study Diagnostic Offers

Two fast, paid diagnostics designed to turn a case-study conversation into a concrete action plan - with clear next steps.

Run This Playbook

\$200

What you get

- 60-minute working session to apply the case-study environment (Sales, Customer Service, Field Service, Power Platform).
- Top 5-10 issues/opportunities ranked by impact, effort to fix first and why.
- A 30-day action plan with recommended owners, milestones, and wins.
- A written recap delivered within 24 hours (executive summary + technical notes).

Format: video call + recording | Duration: 60 minutes

I Want the Field Service

\$300

What you get

- 90-minute optimization session focused on Field Service lifecycle, scheduling/dispatch, SLAs, notifications, and adoption.
- A target-state process model (what the workflow should look like) and the minimum changes required to get there.
- Configuration recommendations (priority order) including testing and reporting that reduce operational drag.
- A written recap delivered within 24 hours with a scope of work for a 5-day sprint or monthly retainer.

Format: workshop-style session | Duration: 90 minutes

How it works

- 1) Purchase the diagnostic on the website (instant receipt).
 - 2) Complete a 3-minute intake (environment, module, pain points, access constraints).
 - 3) Attend the session - we review your current state and map a pragmatic path forward.
 - 4) Receive a written recap within 24 hours with next-step options (fixed sprint or retainer).
- Guardrails: diagnostics are advisory (no production changes performed during the session). If you want hands-on implementation, apply for a retainer.