BaxterLabs Advisory

8-Phase Engagement Prompts

Full Engagement Lifecycle — Operational Playbook

Version 3.0 | February 21, 2026
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Execution Environment: Cowork (all phases)

Overview

These eight prompts operationalize the BaxterLabs-Advisory skill across the full engagement lifecycle — from initial proposal through post-debrief archive. Each prompt is pasted into Cowork with the client's Google Drive engagement folder connected. One system, one context, direct Google Drive read/write.

Version 3.0 expands the original 6-phase system with two critical additions: Phase 0 (pre-engagement sales and setup) and Phase 7 (post-engagement close and archive). Phase 5 now also generates a Phase 2 retainer proposal, prepared before the Executive Debrief so momentum is captured if findings land well.

Phase Alignment to Engagement Lifecycle

Phase	Name	Timing	Prompt Focus
0	Proposal & Engagement Setup	Pre-engagement	Proposal, agreement, data request, folder setup
1	Data Intake & Financial Baseline	Days 1–3	Analyze source data, produce Preliminary Findings Memo
2	Leadership Interviews	Days 4–6	Synthesize transcripts, cross-reference against financials
3	Profit Leak Quantification	Days 7–9	Build master financial workbook, quantify every leak
4	Optimization Analysis	Days 10–11	Operational bottleneck analysis, automation recommendations
5	Report Assembly + Retainer	Days 12–13	Client deliverables + Phase 2 retainer proposal
6	Quality Control	Pre-delivery	Cross-document audit, citation verification, brand compliance
7	Engagement Close & Archive	Post-debrief	Delivery verification, archive creation, file move, lessons learned

Note: The Pivot Plan's Phase 6 (Executive Debrief, Day 14) is a live meeting — no prompt needed. Our Phase 6 covers the QC gate that must pass before that debrief. Phase 7 runs after the debrief is complete.

Prerequisites

Before first engagement, confirm these exist in Google Drive:

- `Standards/BaxterLabs_Brand_Style_Guide_v1.pdf`
- `Standards/BaxterLabs_Citation_Provenance_Guide_v1.pdf`
- `Standards/Document_Inventory.md`
- `Standards/14-Day_Profit_Leak_Audit.md`
- `Template_Library/ with all 28+ templates`

Phase 0: Proposal & Engagement Setup

Pre-Engagement | Before Day 1

This phase converts a prospect into a signed client with a fully prepared engagement folder. Run this when a new prospect is qualified and partners have placed intake notes in 00_Engagement_Info/.

```
Read the BaxterLabs-Advisory skill file. Read Standards/BaxterLabs_Brand_Style_Guide_v1.pdf
and Standards/BaxterLabs_Citation_Provenance_Guide_v1.pdf before producing any output.

You are setting up a new client engagement. Read 00_Engagement_Info/ for any intake notes,
prospect details, or initial correspondence the partners have placed there.

OUTPUT 1 — Engagement Proposal (docx → 00_Engagement_Info/)
Template: Template_Library/00_Sales_and_Marketing/Engagement_Proposal_Template.docx
Client deliverable — Deep Crimson header rule, wordmark, Gold footer, CONFIDENTIAL marking.

Required sections:
- Cover page with client name, BaxterLabs branding, date
- About BaxterLabs Advisory (firm overview, differentiators)
- Engagement scope: 14-Day Profit Leak Diagnostic — what it covers, what it does not
- Methodology overview: 6 phases (Data Intake, Interviews, Quantification,
  Optimization, Report Assembly, Executive Debrief) with timeline
- Deliverables list: Executive Summary, Full Diagnostic Report, Presentation Deck,
  90-Day Implementation Roadmap, Profit Leak Workbook
- Investment: engagement fee ($12K-$15K range per 00_Engagement_Info/ notes)
- Terms: payment schedule, confidentiality, data handling
- Team: George DeVries (narrative, interviews), Alfonso Cordon (financial analysis)
- Next steps and signature block

OUTPUT 2 — Engagement Agreement (docx → 00_Engagement_Info/)
Template: Template_Library/00_Sales_and_Marketing/Engagement_Agreement_Template.docx
Formal agreement with scope, fees, confidentiality, data retention, and signature blocks.

OUTPUT 3 — Data Request List (docx → 00_Engagement_Info/)
Template: Template_Library/01_Engagement_Setup/Data_Request_List_Template.docx
Itemized list of documents BaxterLabs needs before Day 1. For each item:
- Document name (e.g., "Trailing 12-month P&L, monthly detail")
- Why we need it (one sentence linking to analysis methodology)
- Ideal format (Excel preferred for financials, PDF acceptable for contracts)
- Priority: Required vs. Nice-to-Have

Standard request categories: financial statements (P&L, balance sheet, cash flow),
payroll/headcount data, vendor/contractor spend, technology/software inventory,
org chart, key SOPs, billing/invoicing records, client revenue breakdown.

OUTPUT 4 — Engagement Folder Setup (action)
Create the full engagement folder structure if it does not already exist:
  Active_Engagements/[Client_Name]_[Year]/
    00_Engagement_Info/
    01_Inbox/
    02_Interviews/
    03_Working_Papers/
    04_Deliverables/
    05_QC/

Place all Phase 0 outputs into 00_Engagement_Info/.
This folder structure is the foundation — every subsequent phase depends on it.

FAIL LOUDLY: If intake notes are missing or ambiguous (no client name, no industry,
no revenue range), stop and flag what’s needed. Do not generate a proposal with
placeholder data — every proposal must be client-specific.
```

Phase 1: Data Intake & Financial Baseline

Days 1–3 | Pivot Plan Phase 1

Pivot Plan reference: "Alfonso leads initial financial analysis… gross margin trends, expense volatility, cost concentration, payroll ratios, revenue per employee benchmarking. Cowork builds the initial workbook. Output: Preliminary Findings Memo identifying the three to five most promising investigation areas."

```
Read the BaxterLabs-Advisory skill file. Read Standards/BaxterLabs_Brand_Style_Guide_v1.pdf
and Standards/BaxterLabs_Citation_Provenance_Guide_v1.pdf before producing any output.

Analyze every file in 01_Inbox/. For each document:
1. Identify what it is (P&L, balance sheet, payroll, vendor list, SOP, org chart, etc.)
2. Note the date range it covers
3. Extract key financial figures with exact cell/row/page references

Perform financial baseline analysis:
- Gross margin trends (month-over-month if data allows)
- Expense volatility and concentration
- Payroll ratios (revenue per employee, payroll as % of revenue)
- Cost concentration risks (vendor dependency, overhead scaling)
- Revenue per employee benchmarking against industry norms

Then produce these outputs:

OUTPUT 1 — Source Document Registry (markdown → 03_Working_Papers/)
For every file in 01_Inbox/: filename, document type, date range, key figures extracted
with exact locations, and data quality issues. This registry is the citation chain
foundation — every downstream figure traces back here.

OUTPUT 2 — Preliminary Findings Memo (docx → 03_Working_Papers/)
Use template: Template_Library/02_Analysis_Tools/Preliminary_Findings_Memo_Template.docx
Internal document — Dark Teal header, no CONFIDENTIAL marking.

Required sections:
- Memo header (To: Partners, From: BaxterLabs Advisory, Date, Re: [Client]
  Preliminary Financial Review, Engagement ID)
- Purpose: one paragraph stating what this memo establishes
- Data reviewed: every source document from 01_Inbox/ with file dates
- 3-5 most promising investigation areas with supporting financial evidence
- Key financial patterns: findings with full citations
  [Confidence Level: Source Document, Location]
- Operational risks with magnitude estimates where data allows
- Data gaps: explicit list of what's missing and what it would change
- Recommended interview focus areas for Phase 2 leadership interviews

OUTPUT 3 — Data Gap Flag List (markdown → 03_Working_Papers/)
For each gap: what's missing, why it matters, what to ask in interviews,
and what we'll assume if we can't get it (labeled [Assumed] with rationale).

CITATION RULES — non-negotiable:
- Every financial figure carries a citation
- Calculated figures show full derivation (inputs, sources, formula)
- If two source documents contradict, flag explicitly as [DISCREPANCY] —
  do not silently choose one
- If a figure cannot be verified, label it explicitly as unverified
```

Phase 2: Leadership Interviews

Days 4–6 | Pivot Plan Phase 2

Pivot Plan reference: “George leads… Post-interview, cross-references transcripts against financials to identify where leadership perceptions diverge from data.”

Run this prompt after all interviews are complete and transcripts are saved to 02_Interviews/.

```
Read the BaxterLabs-Advisory skill file. Read
Standards/BaxterLabs_Citation_Provenance_Guide_v1.pdf.

Read all interview transcripts in 02_Interviews/. Read the Preliminary Findings Memo,
Source Document Registry, and Data Gap Flag List in 03_Working_Papers/.

For each interview, extract:
- Direct quotes with page/timestamp references that quantify operational reality
- Time estimates for specific activities (hours/week on manual tasks, etc.)
- Stakeholder-reported pain points with dollar or time magnitudes
- Figures that confirm, contradict, or extend the financial data in 01_Inbox/

Cross-reference: where do leadership perceptions diverge from the financial data?

Then produce these outputs:

OUTPUT 1 — Interview Synthesis Matrix (markdown → 03_Working_Papers/)
Structured cross-reference:
- Each major finding from the Preliminary Findings Memo
- What each stakeholder said about it (with transcript citations)
- Where testimony confirms the financial data
- Where testimony contradicts the financial data (flag as [DISCREPANCY])
- New findings that emerged from interviews not visible in financial data

OUTPUT 2 — Workflow Inefficiency Map (markdown → 03_Working_Papers/)
Map the 3 critical workflows identified in interviews. For each:
- Process name and description
- Who it affects (which stakeholders mentioned it)
- Current state vs. described ideal state
- Time cost calculation: hours/week x $/hour x 52 weeks = annual cost
- All figures cited: [Stated: Interview_[Name].docx, page X] or
  [Estimated: hours from interview x rate from Payroll_Report.xlsx]

OUTPUT 3 — Updated Data Gap Resolution (markdown → 03_Working_Papers/)
Update the Phase 1 Data Gap Flag List:
- Gaps resolved by interview data (cite the transcript)
- Gaps still open
- Assumptions now in play (labeled [Assumed] with rationale)

Flag every contradiction between interview testimony and financial documents.
Do not resolve contradictions silently — document for partner review.
```

Phase 3: Profit Leak Quantification

Days 7–9 | Pivot Plan Phase 3

Pivot Plan reference: “Each inefficiency gets a dollar amount through structured scenario modeling… AI accelerates: 30-minute manual scenarios generated in 2 minutes.”

```
Read the BaxterLabs-Advisory skill file. Read both the Brand Style Guide and
Citation Provenance Guide.

Read all working papers in 03_Working_Papers/ from Phases 1 and 2: Source Document
Registry, Preliminary Findings Memo, Interview Synthesis Matrix, Workflow Inefficiency
Map, and Data Gap Resolution.

Model every identified inefficiency with a dollar amount. Categories per Pivot Plan:
overstaffing, vendor overspend, billing lag, software redundancy, process friction.
For each: conservative, moderate, and aggressive scenarios.

OUTPUT 1 — Profit Leak Quantification Workbook (xlsx → 03_Working_Papers/)
Use template: Template_Library/02_Analysis_Tools/Profit_Leak_Workbook_Template.xlsx

THIS WORKBOOK BECOMES THE SINGLE SOURCE OF TRUTH. Every number in every
downstream deliverable must match this workbook exactly.

Required sheets:
1. Summary — executive view of all profit leak categories with totals
2. Revenue Leaks — pricing gaps, billing lag, under-utilization
3. Cost Leaks — overstaffing, vendor overspend, overhead scaling
4. Process Leaks — workflow friction, rework, admin burden, software redundancy
5. Scenario Analysis — conservative/moderate/aggressive for each category
6. Data Sources — citation trail mapping every figure to 01_Inbox/ or 02_Interviews/

Each scenario formula structure:
- Labor: hours/week x $/hour x 52 weeks
- Vendor: current spend vs. benchmark or negotiated rate
- Process: time cost x frequency x error/rework rate
- Revenue: billing lag x avg daily revenue, or utilization gap x billable rate

Excel formatting per Brand Style Guide:
- Header rows: Dark Teal #005454 background, white text, bold
- Data rows: alternate White #FFFFFF and Warm Cream #FAF8F5
- Currency: proper format, negatives in parentheses + Soft Red #C0392B
- Formula cells: locked, visible formula bar
- Tab colors: Crimson = primary, Teal = supporting, Gray = reference
- Wordmark top-left cell of first sheet; print areas set

Every cell with a financial figure must have a comment or adjacent column
with its citation: [Confidence Level: Source, Location].

OUTPUT 2 — Assumptions & Methodology Memo (markdown → 03_Working_Papers/)
Document every assumption: what, why, what data would verify it,
and sensitivity (how much does the total change if off by 20%?).

OUTPUT 3 — Progress Update for Partners (markdown → 03_Working_Papers/)
Total opportunity (headline number), confidence level, breakdown by category,
top 3 findings by magnitude, open items, unresolved discrepancies.
```

Phase 4: Optimization Analysis

Days 10–11 | Pivot Plan Phase 4

Pivot Plan reference: "Identifies which processes are candidates for technology solutions… solutions must be structured for adoption, not just accuracy."

```
Read the BaxterLabs-Advisory skill file. Read the Brand Style Guide and Citation
Provenance Guide.

Read all working papers in 03_Working_Papers/, especially the Profit Leak Quantification
Workbook (your single source of financial truth) and the Workflow Inefficiency Map.

For every profit leak, analyze the optimization path:
- Can it be automated? (full automation, partial automation, process redesign)
- Implementation complexity? (low/medium/high)
- Time to value? (immediate, 30 days, 90 days, 6 months)
- Estimated ROI? (reference workbook figures for cost of problem)

OUTPUT 1 — Operational Bottleneck Analysis (docx → 03_Working_Papers/)
Internal document — Dark Teal header.
For each bottleneck: description, root cause (WHY it exists), financial impact
(exact figure from workbook, cited), current process flow, recommended solution,
dependencies, risk factors.

OUTPUT 2 — Automation & Optimization Recommendations (markdown → 03_Working_Papers/)
Prioritized matrix ranked by: impact ($), complexity, time to value, resources, risk.

Group into:
- Quick Wins (high impact, low complexity — do first)
- Strategic Investments (high impact, high complexity — plan carefully)
- Efficiency Gains (moderate impact, low complexity — batch these)
- Defer (low impact, high complexity — not worth it now)

Each recommendation references the specific profit leak and dollar figure from
the workbook. No vague "significant savings" — every recommendation has a number.

OUTPUT 3 — Implementation Prerequisites (markdown → 03_Working_Papers/)
What the client needs before executing each recommendation: technology, staffing,
process documentation, vendor evaluations, timeline dependencies.
```

Phase 5: Report Assembly + Retainer Proposal

Days 12–13 | Pivot Plan Phase 5

Pivot Plan reference: “Cowork assembles outputs. Alfonso validates numbers. George ensures narrative quality. The standard: board-room ready. Every page suitable for executive presentation without modification.”

New in v3.0: This phase now also generates a Phase 2 retainer proposal (OUTPUT 5), saved to 03_Working_Papers/ as an internal document. Partners decide whether to present it at or after the Executive Debrief.

```
Read the BaxterLabs-Advisory skill file. Read the Brand Style Guide and Citation
Provenance Guide.

Read the Profit Leak Quantification Workbook in 03_Working_Papers/ and all Phase 4
outputs. Every number must match the workbook exactly. No rounding differences.

Produce four client deliverables plus one internal document. Client deliverables use
client branding: Deep Crimson header rule, wordmark right-aligned, Gold footer rule,
CONFIDENTIAL marking.

OUTPUT 1 — Executive Summary (docx → 04_Deliverables/)
Template: Template_Library/03_Client_Deliverables/Executive_Summary_Template.docx
Target: 5-7 pages, board-ready.
Sections: Branded cover, Profit Leak Headline (total $ prominently displayed),
What We Found (3-5 findings with $ each), What It Means (impact if nothing changes),
What We Recommend (top 3 with ROI), Citation key.

OUTPUT 2 — Full Diagnostic Report (docx → 04_Deliverables/)
Template: Template_Library/03_Client_Deliverables/Full_Diagnostic_Report_Template.docx
Target: 25-35 pages.
Sections: Cover, TOC, Executive summary (condensed), Methodology, Financial analysis
by leak category (Revenue/Cost/Process with $ + citations), Interview synthesis,
Root cause analysis (WHY leaks exist), Recommendations, Financial impact summary,
Appendices (source index, calculations, interview excerpts), Citation index.

OUTPUT 3 — Presentation Deck (pptx → 04_Deliverables/)
Template: Template_Library/03_Client_Deliverables/Presentation_Deck_Template.pptx
Target: 12-18 slides for 90-minute debrief.
Sequence: Title → Agenda → Headline number → Where money is going (waterfall/bar) →
Key Finding slides (one per finding) → Root causes → Recommendations (max 3/slide) →
Roadmap timeline → Expected ROI → Next steps → Close.
Charts: Teal → Crimson → Gold → Forest Green → Warm Brown → Warm Gray.

OUTPUT 4 — 90-Day Implementation Roadmap (docx → 04_Deliverables/)
Template: Template_Library/03_Client_Deliverables/Implementation_Roadmap_Template.docx
Sections: Cover, Priority matrix (effort vs. impact), 90-day plan (Weeks 1-4, 5-8,
9-12 with owners/milestones), Resource requirements, Expected outcomes by quarter,
Risk factors, Success metrics.

OUTPUT 5 — Phase 2 Retainer Proposal (docx → 03_Working_Papers/)
Template: Template_Library/00_Sales_and_Marketing/Retainer_Proposal_Template.docx
INTERNAL DOCUMENT — saved to Working Papers, NOT Deliverables. Partners decide
whether and when to present this to the client.

This proposal is prepared BEFORE the Executive Debrief so it is ready if the
client asks “what’s next?” when findings land well. Momentum matters.

Required sections:
- Cover page: “Implementation Engagement Proposal” with client name and date
- Diagnostic recap: 2-3 paragraph summary of what the diagnostic found
  (reference total profit leak $ from workbook, top 3 findings with magnitudes)
- The gap: what the diagnostic identified vs. what remains to implement
- Implementation scope: which Quick Wins and Strategic Investments from Phase 4
  BaxterLabs would execute, with specific deliverables per workstream
- Projected ROI: implementation cost vs. recoverable profit leaks
```

```
  (use conservative scenario figures from the workbook, fully cited)
- Engagement structure: monthly retainer, duration (typically 3–6 months),
  partner hours per month, Cowork automation hours, milestone checkpoints
- Investment: retainer fee range grounded in scope complexity
- Why now: cost of delay — calculate monthly profit leak ongoing if
  implementation is deferred (total annual leak / 12, cited from workbook)

Tone: confident but not pushy. The diagnostic data speaks for itself.
Every number must trace to the Profit Leak Workbook with full citations.

ALL FIVE OUTPUTS must reference identical numbers from the Profit Leak Workbook.
Typography: H1/H2 Deep Crimson, H3 Dark Teal, body Charcoal (never pure black).
Negatives in parentheses + Soft Red. No AI language artifacts. No filler phrases.
Standard: board-room ready, every page suitable for executive presentation.
```

Phase 6: Quality Control

Pre-Delivery Gate | Before Day 14 Executive Debrief

Pivot Plan reference (Quality Standards, p. 17): "All figures internally consistent across every document. Every finding includes methodology, assumptions, confidence level. Conservative, moderate, and aggressive scenarios. No AI-generated language artifacts."

Updated in v3.0: Phase 6 now also audits the Phase 2 retainer proposal (Step 6) to verify financial accuracy before it could be presented to the client.

```
Read the BaxterLabs-Advisory skill file. Read the Citation Provenance Guide and
references/consistency-protocol.md.

You are the pre-delivery quality gate. Nothing reaches the client until this passes.

STEP 1 — Build Canonical Reference Table
Open 03_Working_Papers/Profit_Leak_Workbook.xlsx. Record every key figure:
total opportunity, by category (Revenue/Cost/Process), sub-totals, headcount,
utilization rates, margins, scenario figures (conservative/moderate/aggressive).

STEP 2 — Audit Every File in 04_Deliverables/
For each deliverable, check every financial figure against canonical table:
- Number matches workbook (exact rounding, units) → Flag if mismatch
- Citation present [Confidence: Source, Location] → Flag if missing
- Confidence level assigned (Verified/Stated/Estimated/Assumed) → Flag if absent
- Calculated figures show derivation (formula + cited inputs) → Flag if missing
- Negative values: parentheses + Soft Red → Flag formatting errors
- Range formatting: en dash, no spaces ($X–$Y) → Flag if wrong
- Scenarios present where applicable → Flag if missing

STEP 3 — Cross-Document Consistency
Verify identical figures across: Executive Summary, Full Report, Deck, Roadmap.
Flag any instance where the same metric appears differently in two documents.

STEP 4 — Brand Compliance
For each: correct headers/footers, Charcoal body text (not black), Crimson H1/H2,
Teal H3, correct fonts, CONFIDENTIAL marking, wordmark, chart palette, no AI artifacts.

STEP 5 — Pivot Plan Quality Standards (p. 17)
Every finding has methodology + assumptions + confidence level.
Conservative/moderate/aggressive scenarios for projections.
Narrative: clear, direct, jargon-free. Visual quality: board/investor-ready.
90-day roadmap has owners, timelines, success metrics.

STEP 6 — Audit Phase 2 Retainer Proposal (if generated in Phase 5)
Verify all financial figures in the retainer proposal match the workbook.
Confirm projected ROI uses conservative scenario. Confirm cost-of-delay
calculation is accurate (annual leak / 12). This document stays in
03_Working_Papers/ — do NOT move to 04_Deliverables/.

STEP 7 — Produce QC Report
OUTPUT — Citation Audit Report (docx → 05_QC/)
Filename: Citation_Audit_[Client_Name]_[Date].docx
Sections: Audit scope, Summary (figures audited/issues found/resolved),
Discrepancy log (document, location, written vs. canonical, error type, status),
Cross-document consistency results, Brand compliance results,
Pivot Plan quality standards results, Retainer proposal audit results,
Unresolved items for partner review,
Sign-off block (prepared by, reviewed by, date).

FAIL LOUDLY: If ANY unresolved discrepancy exists, no document moves to client.
Flag blockers explicitly. Do not soft-pedal quality failures.
```

Phase 7: Engagement Close & Archive

Post-Debrief | After Day 14 Executive Debrief

This phase runs after the Executive Debrief is complete. It verifies everything was delivered, captures lessons learned, then creates a clean archive folder, moves all engagement files into it, and removes the active engagement folder. The archive preserves the full citation provenance chain for legal protection — if a client ever challenges a number, BaxterLabs must trace it from deliverable to source in minutes.

```
Read the BaxterLabs-Advisory skill file.

The Executive Debrief (Day 14) is complete. This phase closes the engagement
cleanly, archives all work product, and prepares BaxterLabs for the next client.

STEP 1 — Delivery Verification
Confirm every file in 04_Deliverables/ was delivered to the client.
Cross-reference against the deliverables list in the original Engagement Proposal
(00_Engagement_Info/). For each deliverable: filename, delivery date, delivery method.
Flag any promised deliverable that is missing from 04_Deliverables/.

STEP 2 — Phase 2 Retainer Status
Record the current status of the Phase 2 retainer proposal:
- Presented to client? (yes/no, date if yes)
- Client response? (accepted/declined/pending/not presented)
- If accepted: engagement start date, retainer amount, scope reference
- If pending: follow-up date and responsible partner
- If not presented: reason (partner decision, client not ready, etc.)

STEP 3 — Draft Cleanup
Scan 03_Working_Papers/ for superseded versions and intermediate drafts.
Produce a list of files recommended for removal, grouped by:
- Superseded drafts (earlier versions of files that have final versions)
- Scratch files (temporary analysis, test outputs)
- Files safely archived (referenced in final deliverables, retain for provenance)
DO NOT delete any files yet — this list feeds into the Completion Manifest
for partner review. Actual removal happens in Step 7 after approval.

STEP 4 — Citation Provenance Chain Verification
Verify the complete citation chain is intact and reconstructable:
- Source Document Registry (Phase 1) accounts for every file in 01_Inbox/
- Profit Leak Workbook Data Sources sheet traces every figure
- Citation Audit Report (Phase 6) documents the QC outcome
- No orphaned citations (references to files that don't exist in the engagement folder)
This chain is the legal protection — if a client ever challenges a number,
BaxterLabs must be able to trace it from deliverable to source in minutes.

STEP 5 — Lessons Learned & Reusable Patterns
Produce a brief internal memo capturing:
- What worked well in this engagement (methodology, tools, client interaction)
- What to improve next time (data gaps encountered, timeline pressure points)
- Reusable patterns: any analysis frameworks, interview questions, or workflow
  structures worth incorporating into the Template Library for future engagements
- Industry-specific insights worth capturing for future clients in this vertical

STEP 6 — Template Library Readiness Check
Verify the master Template Library is clean and ready for the next engagement:
- No client-specific data left in any template from this engagement
- All template paths referenced in Phase Prompts 0-6 still resolve correctly
- Flag any templates that need updating based on lessons learned

STEP 7 — Create Archive & Move Engagement Files
This is the physical archival operation. Execute in this order:

7a. Create the archive folder:
  Archive/[Client_Name]_[Year]_[EngagementID]/
    00_Engagement_Info/
```

```
    01_Inbox/
    02_Interviews/
    03_Working_Papers/
    04_Deliverables/
    05_QC/

7b. Copy ALL files from the active engagement into the archive, preserving
    the folder structure exactly. Every file in every subfolder.
    Active_Engagements/[Client_Name]_[Year]/ → Archive/[Client_Name]_[Year]_[EngagementID]/

7c. Remove superseded drafts and scratch files from the ARCHIVE copy only
    (the files identified in Step 3 that partners approved for removal).
    The archive should contain final versions and provenance-critical files only.
    DO NOT remove files from the active folder — archive copy only.

7d. Place the Completion Manifest (OUTPUT 1) into the archive’s 05_QC/ folder.
    Place the Lessons Learned Memo (OUTPUT 2) into the archive’s 03_Working_Papers/.

7e. Verify the archive is complete:
    - File count matches expected (total active files minus approved removals)
    - Citation chain files all present (Registry, Workbook, Audit Report)
    - Deliverables folder matches delivery verification from Step 1
    - Completion Manifest is in 05_QC/

7f. Once archive is verified, remove the active engagement folder:
    Delete Active_Engagements/[Client_Name]_[Year]/
    This keeps Active_Engagements/ clean for current work only.
    FAIL LOUDLY if archive verification in 7e did not pass — do NOT delete
    the active folder if the archive is incomplete.

OUTPUT 1 — Engagement Completion Manifest (markdown → archive 05_QC/)
Filename: Completion_Manifest_[Client_Name]_[Date].md
A single document that records:
- Client name, engagement ID, engagement dates
- All deliverables produced with filenames and delivery confirmation
- Phase 2 retainer proposal status
- QC outcome (pass/fail, Citation Audit Report reference)
- Files archived (complete list with paths)
- Files removed during cleanup (list with justification for each)
- Citation chain integrity status (intact/issues flagged)
- Lessons learned summary
- Template Library status (ready/updates needed)
- Archive location: Archive/[Client_Name]_[Year]_[EngagementID]/
- Active folder status: removed (date) or retained (reason)
- Sign-off: engagement formally closed by [partner name], [date]

OUTPUT 2 — Lessons Learned Memo (markdown → archive 03_Working_Papers/)
Internal memo with the Step 5 content above.

FAIL LOUDLY: If any deliverable was promised but not delivered, if the citation
chain has gaps, if client-specific data is found in the Template Library, or if
the archive verification fails — flag as a blocker. The engagement is not closed
and the active folder is NOT deleted until all blockers are resolved.
```

Usage Notes

All Cowork, all the time. Every phase runs in Cowork with the client's Google Drive folder connected. No context switching between systems.

Full lifecycle coverage. Phase 0 handles sales and setup before the 14-day engagement begins. Phases 1–6 execute the diagnostic. Phase 7 closes out after the Executive Debrief. No manual gaps.

Prompt chaining. Each phase builds on the previous. Phase 1 reads the folder Phase 0 created. Phase 2 reads Phase 1 outputs. Phase 3 reads 1–2. Phases 4–5 read the workbook. Phase 6 audits everything. Phase 7 verifies it all.

Single source of truth. Once the Profit Leak Workbook exists (Phase 3), it governs all downstream numbers. To change a number, change it in the workbook first, then regenerate affected deliverables.

Phase 2 retainer momentum. The retainer proposal is generated during Phase 5 and QC'd in Phase 6 so it's ready before the debrief. If findings land well, the proposal is ready. If not, it stays in Working Papers. No wasted effort either way.

FAIL LOUDLY. Missing data, contradictions, insufficient evidence — surface the problem, don't paper over it. Every assumption labeled. Every sensitivity documented.

Partner review gates. Natural checkpoints after Phases 1, 3, 6, and 7 where partners review before proceeding. Phase 7's draft cleanup list requires partner approval before any files are removed.

Day 14 Executive Debrief. Not a prompt — it's a live 90-minute meeting. George leads narrative, Alfonso handles financial deep-dives. Phase 5 deliverables are the meeting materials. Phase 6 QC ensures they're ready.

Clean archive = legal protection. Phase 7 creates Archive/[Client]_[Year]_[ID]/, copies all engagement files in, removes approved drafts from the archive copy, verifies the citation chain, then deletes the active engagement folder. Active_Engagements/ stays clean for current work. The archive is the permanent record.

Template paths. If templates are reorganized, update paths in each prompt. The Document Inventory (Standards/Document_Inventory.md) is the master reference.

Hours budget from Pivot Plan. Total 30–41 human hours across both partners for Phases 1–6. Phase 0 adds ~2–3 hours. Phase 7 adds ~1–2 hours. AI handles the mechanical work. Partners handle judgment, client interaction, and quality sign-off.

Engagement Folder Structure

Folder	Contents	Access
00_Engagement_Info/	Proposal, agreement, data request, client profile, SOW	Read/Write (Phase 0)
01_Inbox/	Raw client files (P&L, balance sheet, payroll, vendors)	Read-only
02_Interviews/	Transcripts and recordings	Read-only
03_Working_Papers/	Analysis files, workbook, internal memos, retainer proposal	Read/Write
04_Deliverables/	Final client-facing documents only	Write (finished only)
05_QC/	QC checklists, citation audit reports, completion manifest	Write
Archive/[Client]_[Year]_[ID]/	Complete archived engagement (mirrors active structure)	Write (Phase 7)

Version History

Version	Date	Changes
2.0	Feb 20, 2026	Initial 6-phase system with workspace safety guardrails
3.0	Feb 21, 2026	Added Phase 0 (Proposal & Setup), Phase 7 (Close & Archive). Updated Phase 5 with retainer proposal (OUTPUT 5). Updated Phase 6 with retainer QC (Step 6). Expanded usage notes for full lifecycle.