exec\_defined={{ executive\_summary is defined }} len={{ executive\_summary|default('', true)|length }}

**Consulting Business**

**Operational Performance Assessment**

A structured review of your firm’s positioning, sales, delivery,  
and client growth potential

Prepared for: [Client Firm Name]  
Date: [Month Day, Year]

****

[Your Personalized Assessment Results 3](#_Toc207028517)

# Your Personalized Assessment Results

.

BUSINESS MATURITY ASSESSMENT REPORT

{{ user\_information.first\_name }} {{ user\_information.last\_name }}

{{ user\_information.company }}

{{ assessment\_date }}

Assessment Overview

===================

Participant Information:

• Name: {{ user\_information.first\_name }} {{ user\_information.last\_name }}

• Company: {{ user\_information.company }}

• Role: {{ user\_information.role }}

• Industry: {{ user\_information.industry }}

• Email: {{ user\_information.email }}

Assessment Completion:

• Date Completed: {{ assessment\_date }}

• Total Questions Answered: {{ questions\_count }}

• Pain Points Identified: {{ selected\_pain\_points\_count }}

Selected Business Challenges:

{% if selected\_pain\_points\_details and selected\_pain\_points\_details|length > 0 %}

{% for pain\_point in selected\_pain\_points\_details %}

• {{ pain\_point['title'] }}: {{ pain\_point['description'] }}

{% endfor %}

{% endif %}

{% if custom\_challenges\_text and custom\_challenges\_text.strip() %}

Additional Custom Challenges:

{{ custom\_challenges\_text }}

{% endif %}

Overall Performance Summary

===========================

OVERALL MATURITY SCORE: {{ "{:.1f}".format(overall\_score) }}/4.0

Industry Benchmark: {{ "{:.1f}".format(industry\_average) }}/4.0

Performance Gap: {% if overall\_score > industry\_average %}+{{ "{:.1f}".format(overall\_score - industry\_average) }} (Above Industry Average){% elif overall\_score == industry\_average %}0.0 (At Industry Average){% else %}{{ "{:.1f}".format(overall\_score - industry\_average) }} (Below Industry Average){% endif %}

Category Performance Breakdown:

{% for category, score in category\_scores.items() %}

• {{ category }}: {{ "{:.1f}".format(score) }}/4.0

{% endfor %}

📊 VISUALIZATIONS

=================

{% if radar\_plot %}

Radar Chart - Overall Performance Overview:

{{ radar\_plot.show(width="5in") }}

{% else %}

Radar Chart: Data not available

{% endif %}

{% if lollipop\_plot %}

Detailed Question-by-Question Comparison:

{{ lollipop\_plot.show(width="6in") }}

{% else %}

Lollipop Plot: Data not available

{% endif %}

{% if executive\_summary is defined and executive\_summary %}

Executive Summary

=================

{{ executive\_summary }}

Strategic Insights & Analysis

=============================

{{ contradictions\_insights }}

Strategic Challenge Questions

============================

{{ challenge\_questions }}

Service Recommendations

======================

{{ recommended\_services }}

{% else %}

Executive Summary

=================

This comprehensive business maturity assessment evaluated {{ user\_information.company }} across multiple critical dimensions. Your organization achieved an overall maturity score of {{ "{:.1f}".format(overall\_score) }}/4.0, compared to an industry average of {{ "{:.1f}".format(industry\_average) }}/4.0.

{% endif %}

**Recommended Service Offerings**

**{# ===========================**

**Dynamic Inserts for Top 3 and Other Services (no hardcoded filenames)**

**Requires:**

**- top\_three\_template\_paths: ordered list of 3 template paths (preferred)**

**- top\_three\_offerings: list of 3 offering names (fallback)**

**- offering\_document\_files\_list: list of doc objects with .name / .filename / .template\_path**

**=========================== #}**

**{% if offering\_document\_files\_list %}**

**{# --- helpers (for fallback) --- #}**

**{% macro norm(s) -%}**

**{{- (s or '')|lower|replace('&','and')|replace('—','-')|replace('–','-')|replace(' ',' ')|trim -}}**

**{%- endmacro %}**

**{# robust match: does this doc correspond to a specific offering name (fallback) #}**

**{% macro strong\_match(off\_name, doc\_name) -%}**

**{%- set o = norm(off\_name) -%}**

**{%- set d = norm(doc\_name) -%}**

**{%- set toks = o.split()[:3] -%} {# first 2–3 words as signal #}**

**{%- set toks\_all\_in = (toks|length > 0) and (toks | select('in', d) | list | length == toks|length) -%}**

**{{- (o and (o in d or d in o)) or toks\_all\_in -}}**

**{%- endmacro %}**

**{# track which doc template\_paths were selected for top 3 to exclude from others #}**

**{% set ns = namespace(selected\_paths=[]) %}**

**{# ===================== TOP 3 (ORDER GUARANTEED) ===================== #}**

**{% if top\_three\_template\_paths and top\_three\_template\_paths|length == 3 %}**

**Recommended Service Proposal Inserts**

**===================================**

**{% for tpl in top\_three\_template\_paths %}**

**{{p include\_docx\_template(tpl) }}**

**{% set ns.selected\_paths = ns.selected\_paths + [tpl] %}**

**{% endfor %}**

**{# ===================== FALLBACK (NAME MATCHING) ===================== #}**

**{% elif top\_three\_offerings and top\_three\_offerings|length > 0 %}**

**Recommended Service Proposal Inserts**

**===================================**

**{% for off in top\_three\_offerings %}**

**{% set off\_included = false %}**

**{% for doc in offering\_document\_files\_list %}**

**{% if not off\_included %}**

**{% set doc\_name = doc.name or doc.filename or doc.template\_path %}**

**{% if strong\_match(off, doc\_name) and (doc.template\_path not in ns.selected\_paths) %}**

**{{p include\_docx\_template(doc.template\_path) }}**

**{% set ns.selected\_paths = ns.selected\_paths + [doc.template\_path] %}**

**{% set off\_included = true %}**

**{% endif %}**

**{% endif %}**

**{% endfor %}**

**{% endfor %}**

**{% endif %}**

**{# ===================== OTHER SERVICES ===================== #}**

**Other Available Services**

**========================**

**{% for doc in offering\_document\_files\_list %}**

**{% if doc.template\_path not in ns.selected\_paths %}**

**{{p include\_docx\_template(doc.template\_path) }}**

**{% endif %}**

**{% endfor %}**

**{% endif %}**

**RESPONSE ANALYSIS AND RECOMMENDED ACTIONS**

{%p for i in range(question\_prompts|length) %}

**Question / Assessment Statement {{ i + 1 }}:**

{{ question\_prompts[i] }}

**Your response:**

{{ answers[i] if i < answers|length else 'No answer' }}

{% set lvl = (answer\_levels[i] if i < answer\_levels|length else -1) -%}

{% if lvl == 4 -%}

*You've reached the highest maturity level in this area. Focus on maintaining excellence.*

{% else %} **Recommended ‘Next Best Action’:**

{{ improvement\_matrix[i][lvl] if 0 <= lvl < (improvement\_matrix[i]|length) else '' }}

{% endif %}

{%p endfor %}

Assessment Methodology

======================

This assessment utilized a comprehensive {{ questions\_count }}-question evaluation framework covering:

{% for category in category\_scores.keys() %}

• {{ category }}

{% endfor %}

Technical Implementation Notes:

• Document Generation: {{ document\_merger\_status }}

• AI Processing: {% if ai\_processing\_complete %}✅ AI Insights Generated{% else %}❌ AI Processing Failed{% endif %}

Report Generation Date: {{ assessment\_date }}

openAI token usage

{{ total\_prompt\_tokens }}

{{ total\_completion\_tokens }}

{{ total\_tokens }}

* Main report:
* {{ total\_prompt\_tokens }}
* {{ total\_completion\_tokens }}
* {{ total\_tokens }}
* Help function (preferred totals):
* {{ help\_prompt\_tokens\_total }}
* {{ help\_completion\_tokens\_total }}
* {{ help\_total\_tokens\_total }}
* Help function (fallbacks if totals missing):
* {{ help\_prompt\_tokens }}
* {{ help\_completion\_tokens }}
* {{ help\_total\_tokens }}

{{ help\_tokens\_debug }} (expected like “3620 | 636 | 4298”)

{{ main\_tokens\_debug }} (expected like “3348 | 2337 | 5685”)