> Ready for reporting. Client report eligible; evidence still requires consultant review.

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Client growth opportunity report

Evergreen Wellness Studio | November 2, 2026

Executive summary

FICTIONAL DEMONSTRATION DATA. Wellness · fictional demonstration. Selected scenario: Moderate. All amounts in USD.

At full implementation, the selected assumptions illustrate $39,085 in additional annual revenue and $16,542 in annual operating profit improvement after entered recurring costs. Actual results may be lower, negative or materially different.

> Illustrative scenarios, not forecasts, industry benchmarks or guaranteed outcomes. Conservative, Moderate and Optimistic are editable labels describing assumptions, not probabilities.

Financial baseline	Current annual position
Revenue	$1,000,000
Gross profit / margin	$600,000 / 60.0%
Operating profit / margin	$150,000 / 15.0%
Operating expenses	$450,000
Selected scenario result	**Annual full implementation**
Revenue	$1,039,085
Additional revenue	$39,085
Gross profit / margin	$623,451 / 60.0%
Operating profit / margin	$166,542 / 16.0%
Operating profit improvement	$16,542

Baseline operating profit **$150,000**



Annual operating profit potential **$166,542**



Prepared by IMS Consultant | hello@imsol.io.

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Opportunities and delivery capacity

Only selected, applicable levers appear below. Contribution is before shared recurring implementation and setup costs. Acquisition spend is deducted in its lever once.

Applicable opportunity	Annual revenue	Operating contribution
Sales conversion	$3,708	$1,854
Customer retention	$3,090	$1,545
Customer reactivation	$1,545	$773
Transaction value / upselling	$30,000	$15,000
Operating cost reduction	$0	$3,000
Qualified customer acquisition	$742	-$2,629

Capacity assumption	Value
Current annual / total capacity	10000 / 10200 appointment units
Raw added / served added units	88.20 / 88.20
Fulfillment factor	100.0%

> Capacity is allocated in proportion to modeled added units, not to maximize profit. This is not financial optimization. Committed costs stay payable.

Separate customer pools are confirmed by the consultant. Active, lapsed, existing-new-lead and additional-acquisition pools must not overlap. No identity-level deduplication is performed; unconfirmed pools are withheld.

Priorities to investigate

1. Transaction value / upselling: $15,000 contribution before shared costs. Increase the value of each service or transaction.

2. Operating cost reduction: $3,000 contribution before shared costs. Reduce a defined pool of addressable overhead.

3. Sales conversion: $1,854 contribution before shared costs. Convert more of the opportunities already entering the funnel.

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First-year timing and implementation costs

> Annual full-implementation potential and estimated first-year impact are different. First-year estimates apply the entered timing to incremental benefits only. They are hypothetical estimates, not actual results.

Implementation assumption	Selected value
Start month (1 = beginning of modeled year)	3
Linear benefit ramp in months	3
First-year share of annual benefits	75.0%
Committed annual acquisition spend	$3,000
Committed annual recurring implementation cost	$3,000
One-time setup cost	$2,000

Before the start month benefits are zero. From the start month, a nonzero ramp increases monthly benefits by 1 / ramp-months until full benefit is reached. A zero-month ramp starts at full benefit immediately. Capacity is allocated annually before applying timing; unused capacity is not moved between months.

Conservative cost convention: the entire entered annual acquisition and recurring implementation spend is deducted in the first year, plus setup costs. Costs are not automatically prorated for a late start or reduced for constrained delivery. Baseline operations are held constant; no seasonality, tax, financing, price elasticity or cash-flow model.

Estimated first year	Timing-adjusted illustration
Revenue	$1,029,313
Operating profit	$158,907
Operating profit change vs baseline	$8,907
Annual potential less setup only (not timed)	$164,542

The setup-only adjustment is shown for reconciliation; use the timing-adjusted estimate when discussing the first year.

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Three-scenario comparison

These are the first three scenarios in this assessment. All are editable illustrations and share the same baseline. A renamed or edited scenario is still an assumption, never a forecast.

Measure	Conservative	Moderate	Optimistic
Annual revenue potential	$1,012,969	$1,039,085	$1,078,698
Annual added revenue	$12,969	$39,085	$78,698
Annual operating profit potential	$154,285	$166,542	$185,349
Annual operating profit change	$4,285	$16,542	$35,349
Estimated first-year revenue	$1,009,727	$1,029,313	$1,059,024
Estimated first-year operating profit	$151,414	$158,907	$171,012
Estimated first-year operating profit change	$1,414	$8,907	$21,012

Conservative: Ready for reporting. Timing applies; start month 3, ramp 3 months; benefit factor 75.0%; within entered capacity.

Moderate: Ready for reporting. Timing applies; start month 3, ramp 3 months; benefit factor 75.0%; within entered capacity.

Optimistic: Ready for reporting. Timing applies; start month 3, ramp 3 months; benefit factor 75.0%; within entered capacity.

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Assumptions, evidence and next steps

Selected lever assumption	Value
Sales conversion	3 points
Customer retention	3 points
Customer reactivation	3 %
Transaction value / upselling	3 %
Operating cost reduction	3 %
Qualified customer acquisition	3 leads / month
Financial / customer assumption	**Value**
Annual units / derived unit value	10000 / $100
Existing leads per month / conversion	100 / 20%
Active pool / baseline retention	1000 / 80%
Lapsed pool / units per new, retained, reactivated customer	500 / 1, 1, 1
Additional-lead conversion	20%
Volume gross / contribution margin	60% / 50%
Value gross / contribution margin	60% / 50%
Eligible operating-cost pool	$100,000

Evidence is supplied by the consultant, not independently verified. Unspecified evidence is an unverified assumption. 0 input records are marked verified with source and date; this is not a probability score.

Recommended next steps

Confirm the input data, test one improvement, measure the outcome, then revisit the assumptions.

Annual revenue excludes sales tax and lifetime value. Value/volume interaction is counted once. Savings exclude direct costs. These illustrations are decision support, not accounting, tax or investment advice.

Model 1.2-stage3.1. IMS: hello@imsol.io. Grow Relationships. Scale Revenue.