



U.S. COMMERCIAL HVAC / ILLUSTRATIVE SAMPLE

Quarterly Intelligence Update

Ongoing monitoring, score movement, and next-quarter priorities

SAMPLE PROFILE

ILLUSTRATIVE COMPANY Meridian Commercial Mechanical

MONITORING PERIOD Q2 2026

PREPARED BY WealthOps Engine LLC

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Better Businesses.

EXECUTIVE
DECISION INDEX

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Quarterly Executive Update

During the illustrative quarter, Meridian Commercial Mechanical improved management reporting cadence and service-agreement visibility while working-capital pressure remained elevated. The Executive Decision Index increased from 64 to 68, reflecting evidence of better financial discipline and recurring-revenue measurement rather than a change in underlying market demand.

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CURRENT EDI

+4 THIS QUARTER

QUARTERLY POSTURE

IMPROVING

Controls and visibility strengthened;
cash conversion remains the primary
management watch item.

What changed

Monthly margin reporting was introduced, service agreements were segmented for renewal and profitability review, and leadership established a recurring operating cadence. Receivables aging and capacity pressure continue to limit the strength of the overall improvement.

VERIFIABLE EDI MOVEMENT

Prior: $(6 + 7 + 6 + 7 + 6) / 50 \times 100 = 64$

Current: $(6 + 8 + 7 + 7 + 6) / 50 \times 100 = 68$ | Change: +4

Score Movement and New Signals

Dimension	Prior	Current	Movement	Quarterly interpretation
Growth	6	6	-	Demand remains favorable; capacity is unchanged.
Financial maturity	7	8	+1	Monthly margin reporting improves visibility.
Operational maturity	6	7	+1	Operating cadence and owners are clearer.
Market position	7	7	-	No material change in observed positioning.
Enterprise value readiness	6	6	-	Recurrence improved; cash conversion remains a constraint.

New monitored signals

Positive: Service-agreement reporting is now segmented by renewal and contribution margin.

Watch: Receivables over 60 days remain above the illustrative management threshold.

Unknown: Backlog conversion and technician productivity need another quarter of consistent data.

Progress, Exceptions, and Next-Quarter Priorities

Prior-quarter priority	Status	Evidence
Launch monthly margin pack	Complete	Three consecutive monthly reviews held.
Segment service agreements	In progress	Installed base segmented; renewal economics incomplete.
Implement 13-week cash forecast	At risk	Model exists; owner inputs and AR cadence are inconsistent.

Next-quarter executive priorities

1	Stabilize cash forecasting	Assign weekly inputs, aging actions, and variance review.
2	Complete agreement economics	Measure renewal, churn, and contribution margin.
3	Define capacity thresholds	Link hiring and field leadership to service demand.

Monitoring Methodology and Membership Scope

Quarterly Intelligence Membership begins after a company baseline has been established. Each update reviews material company and market signals, refreshes relevant scores, distinguishes new evidence from prior assumptions, tracks progress against earlier priorities, and identifies next-quarter executive actions.

What a quarterly update includes

Executive Decision Index movement, dimension score changes, new and resolved signals, priority status, material exceptions, evidence-confidence commentary, and a concise next-quarter agenda.

Important limitations

This sample is illustrative and does not describe a real company. Monitoring depends on available public and company-provided information and is not continuous real-time surveillance. The membership is decision support, not an audit, valuation, legal opinion, investment recommendation, or guarantee.

Continue with Quarterly Intelligence Membership

\$499/month after a company baseline has been established

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