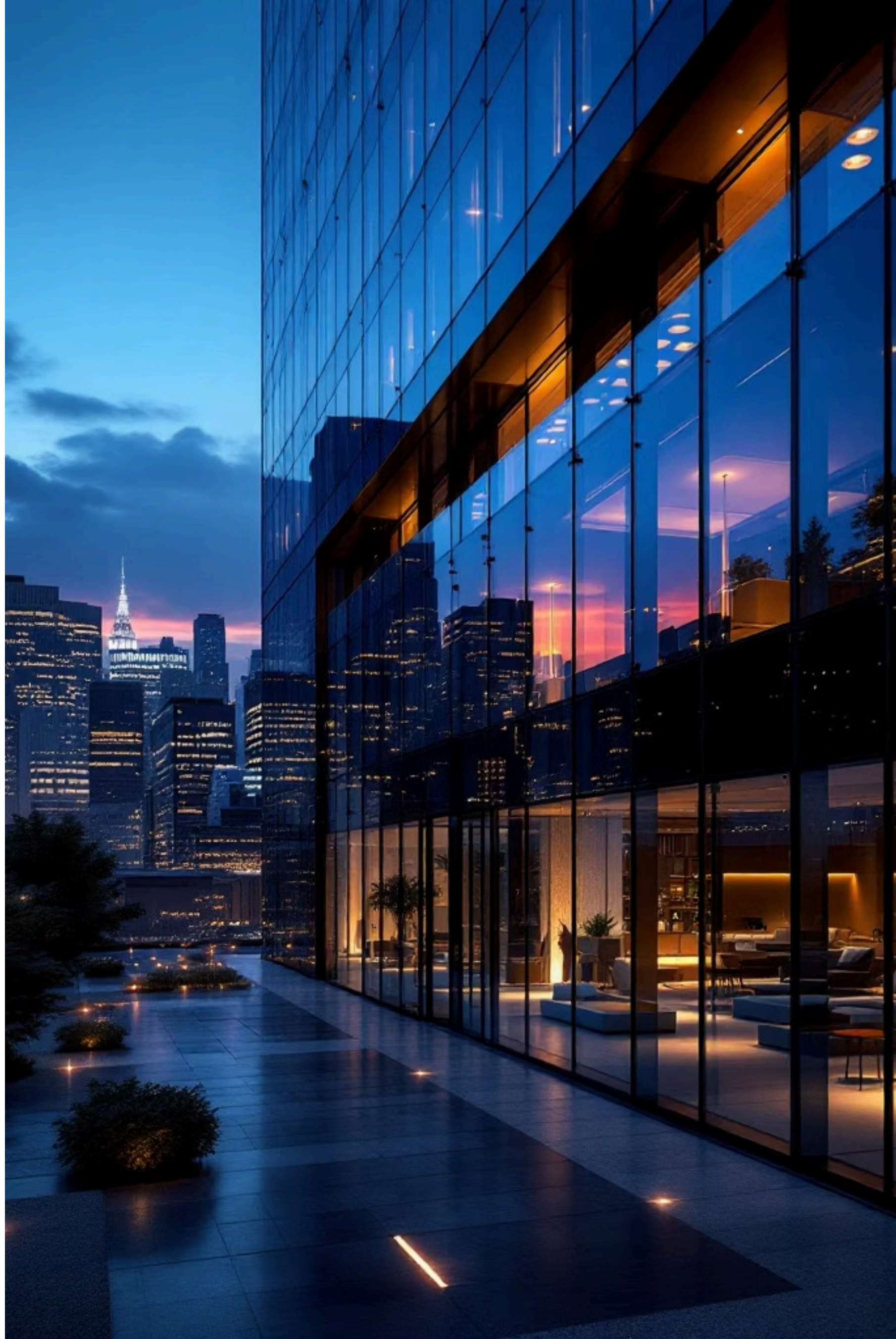
Sample Operating System Roadmap

A structured, phase-by-phase plan for sequencing systems improvements, reporting infrastructure, and automation work — built for leadership teams ready to scale with clarity.

MVP.DEV

EXECUTIVE ARTIFACT



Where Friction Lives Today

Before building forward, it's critical to name what's slowing the organization down. Three structural blockers are limiting throughput and decision quality across the operation.

Fragmented Reporting

KPIs live in four or more disconnected tools. Leaders are reconciling numbers manually before every review — creating lag, inconsistency, and misaligned priorities.

Manual Approvals

Vendor approvals, budget exceptions, and headcount requests route through email chains with no audit trail. Decisions are slow, inconsistent, and impossible to track at scale.

Unclear Ownership

Cross-functional work stalls because accountability is assumed, not assigned. No single owner exists for critical operating processes, creating recurring gaps in execution.

Roadmap: Phase 1 & Phase 2

The first two phases focus on establishing a clean data foundation and automating the highest-friction approval workflows — creating visible wins within 60 days.

PHASE 1 — DAYS 1–30

Reporting Consolidation

- **Action:** Audit all active dashboards and designate a single source of truth per business unit
- **Owner:** COO + Head of Analytics
- **Action:** Deprecate redundant reports; migrate to one BI layer
- **Owner:** Operations Lead

Outcome: Leadership reviews from a single, reconciled view within 30 days.

PHASE 2 — DAYS 31–60

Approval Workflow Automation

- **Action:** Map all manual approval flows; identify top 5 by volume and delay
- **Owner:** Head of Finance + Ops
- **Action:** Implement structured approval routing in existing tools (e.g., Slack, Linear, or dedicated workflow software)
- **Owner:** Systems Lead

Outcome: Audit-ready approval trails and 40–60% reduction in approval cycle time.

Phase 3 & Governance Model

PHASE 3 — DAYS 61–90

Ownership Architecture & AI Rollout

01

Assign Process Owners

Every critical operating workflow gets a named DRI (Directly Responsible Individual) with documented scope.

02

Vendor Controls

Establish a vendor registry with renewal dates, spend thresholds, and owner sign-off requirements. Eliminate shadow procurement.

03

AI Tooling Rollout

Pilot AI-assisted summarization and routing in 2–3 high-volume workflows. Measure time-to-decision before and after. Expand based on ROI evidence, not preference.

GOVERNANCE MODEL

Decision Cadence

- **Weekly:** Ops standup — blockers, metrics delta, escalations
- **Bi-weekly:** Cross-functional leads sync — ownership review
- **Monthly:** Leadership operating review — roadmap progress, vendor spend, AI performance

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AI rollout is gated by governance readiness. No automation layer should run ahead of clear ownership and clean data inputs.

What Changes in the First 30–60 Days

This is not a long-horizon transformation — it is a disciplined sequence with measurable outputs. Leadership should expect the following concrete changes by Day 60.

One Source of Truth

All leadership reviews run from a single, reconciled reporting layer. No more pre-meeting number alignment.

Approvals Have a Trail

Every budget exception and vendor request routes through a documented, time-stamped process. Accountability is structural, not cultural.

Ownership Is Explicit

A named DRI exists for every critical workflow. "Who owns this?" is no longer a meeting question — it's a reference lookup.

AI Enters Responsibly

Automation is layered onto clean, governed processes — not used as a substitute for missing structure. Early pilots produce measurable ROI data.

> The goal is an operating system that scales with the company — not one that requires heroics to maintain it.