Approach Business Performance Review What we do Accountancy About

Guide to the Business Performance Review

What you receive, in detail.

This is the comprehensive client reference for the Business Performance Review — exactly what is included, what is delivered, how long it takes, and answers to the questions people most often ask before they book.

Download as PDF Book a Review

A fixed-scope engagement. Introductory launch price £500. See whether the BPR is the right fit before you send an enquiry.

What's included

The fixed scope, in detail

The scope is published so you know what you are buying before you commit. It is fixed because the £500 introductory launch price assumes a fixed scope; if your engagement needs more, that is the BPR Plus tier and is discussed after the Launch review.

Business profile

- One legal entity
- One primary business unit or site
- Up to 50 employees (full-time equivalent)
- One leadership team

People — up to 4 interviews

- Managing Director or Owner
- Operations Manager or Operations Lead
- Finance or Admin Lead
- One operational team member

If only 2–3 of these people exist in your business, that is fine. We work with whoever is appropriate.

Processes — up to 5

- You choose the 5 processes in advance
- Common examples: client onboarding, document collection, bookkeeping workflow, period-end close, client communication
- Each is walked through in a 60–90 minute session

We focus on the work that matters, not every task the business performs.

Systems — up to 8

- Your existing tools — practice management, accounting, document management, communication, infrastructure
- We review how they fit together, what is duplicated, where data is re-keyed
- Hardware, networks and physical security are outside this scope

The review starts with what you already use; change is recommended only where the change pays for itself.

Deliverables

The eight reports and decision artefacts you receive

- **Business Performance Index.** A 0–100 headline score for the business, plus six sub-scores: Operational Efficiency, Automation Readiness, Governance, Data Maturity, Operational Resilience, and Insight & Reporting. The score is comparable over time, so the next quarter's BPI tells you whether the change worked.
- **Maturity Profile.** Your business's level (1–5) across eight operational dimensions, with what "next level" practically requires. Honest about where the business is doing well, not only where it isn't.
- **Operational Waste Analysis.** Hours lost and cost-of-current-state, broken down by process and by category (rework, delay, error, duplication). Numbers come from the interviews and walkthroughs, not from assumptions.
- **Governance Review.** Your data flows, permissions, integrations and decision rights against the seven Failsafe operating principles. Honest about gaps, with prioritised remediation.
- **AI Readiness.** Where AI would genuinely help in your business, where it wouldn't, and what must be true first (data, governance, human oversight). Deliberately understated. Where the answer is "not yet," the report says so.
- **Top 10 Opportunities.** Ranked by impact and effort using a transparent score. Each entry is one sentence on what to do and why; together they form a one-page executive brief.
- **Prioritised Roadmap.** Quick wins and initiatives on a quarterly timeline. Sequencing notes the dependencies — what has to happen before what, and what can run in parallel.
- **Executive Presentation.** Delivered to your leadership team in person or via video. Same content as the Executive Summary, with images designed to be discussed in the meeting.

The report's shape

What the written report looks like

The report is a structured business document, not a graphics-heavy deck. It reads in plain English, is sized to be printed and kept, and includes the figures a Managing Partner will refer back to when reviewing quarterly. Each section below corresponds to a chapter.

- **Executive Summary.** Two pages. The BPI score, the maturity snapshot, the top three opportunities and the recommended next move.
- **Current-State Map.** How the business runs today, in plain language. Each of the five processes you chose is described end-to-end with the systems touched, who is involved, where delay and error occur.
- **Scores in detail.** The Business Performance Index, the six sub-scores and the Maturity Profile, with the underlying evidence behind each.
- **Operational Waste Register.** Quantified hours, errors and risk exposure, broken down by category.
- **Opportunity Register.** Numbered Top 10 opportunities with the impact, complexity and risk score for each; a build/buy/keep recommendation; and an indicative payback window.
- **Roadmap.** Quarterly sequencing, with dependencies shown.

- **Governance Section.** Permissions, data flows, integrations and decision rights, against the seven Failsafe operating principles.
- **AI Section.** Honest assessment of where AI helps and where it doesn't, with the conditions that would have to be true before it did.
- **Appendix.** Source attribution for the discovery notes, evidence list and any sector research cited.

How it works

The engagement, week by week

1. 1

   ### Week 0 · Discovery call

   A 30-minute video call to confirm the BPR is the right shape for you. We agree the five processes to look at, the four interviewees and the kickoff date. Engagement terms are signed; the kickoff note is sent.

2. 2

   ### Weeks 1–2 · Fieldwork

   Interviews run as 45-minute sessions, scheduled to suit each interviewee's diary. Process walkthroughs are 60–90 minutes, ideally observed alongside the work rather than described from memory. We accommodate the business; the engagement does not disrupt operations.

3. 3

   ### Week 2 · Mid-engagement checkpoint

   A 30-minute call to confirm direction. Any obvious course corrections are noted. You see early signals on where the scores are likely to land, with the caveat that the draft is still in flight.

4. 4

   ### Weeks 3–4 · Analysis and report drafting

   We transform what we heard into scores, opportunities and a roadmap. Time invested here is where the methodology matters; the writing is iterative, not a template filled in.

5. 5

   ### Week 5–6 · Executive Presentation

   The presentation is delivered to your leadership team in a 60–90 minute session, with room for discussion. The written report and the Executive Summary are handed over at the same time.

What to prepare

A short checklist before fieldwork begins

Nothing exotic. Most of this you already have.

- Names and contact details for the four interviewees (or fewer, where applicable).
- The five processes you would like the review to focus on. If you are unsure, we help you choose on the discovery call.
- List of the systems the business uses — names are enough; sign-in access is not required at this stage.
- Any KPIs or numbers you track today, even approximate, for the Operational Waste Analysis baseline.
- Your appetite for change (a short paragraph). Helps scope what the Roadmap recommends.
- Time on calendars for the four 45-minute interviews and five 60–90-minute walkthroughs, scheduled across a 10–14 day window.

Typical outcomes

What changes after a Business Performance Review

We do not promise specific commercial results; outcomes depend on the priorities a business chooses to act on. What the engagement reliably produces is the following.

- **Clarity.** A shared, evidence-led understanding of how the business actually runs today — including the work that costs time without anyone noticing. The kinds of conversations that drift without the review are anchored to facts and observed patterns.
- **Prioritisation.** A short, ranked list of improvements with the impact, complexity and risk scored transparently. The leadership team can act on it without further analysis; the order of work is settled.
- **Better decision-making.** The same baseline measured in the months ahead, so the next quarter's decisions sit on evidence rather than anecdote.

Beyond the diagnostic fee itself, ROI is measured where a quick win is identified and acted on: the report establishes the baseline before the change, and you can re-measure against it when the change is in place. That re-measurement is what we call evidence, and it is what the methodology exists to produce.

Frequently asked questions

The questions people most often ask before they book

What is the difference between a Business Performance Review and a tech audit?

The BPR is broader than a tech audit. We look at the whole operating system of the business — practices, processes and people — and we recommend technology only where the broader system shows technology is the right answer. A tech audit starts with the systems and works outward; a BPR starts with the business and works inward toward technology.

Will I have to share confidential client data?

No. The BPR works from anonymised process information, role descriptions, and the systems in use. We do not need access to your client records, customer data, or anything subject to professional confidentiality. Where a walkthrough would benefit from seeing how data actually flows through a system, we observe with anonymised or test data where possible.

We are still running on paper for some workflows. Is this scope?

Yes. Paper-led workflows are some of the highest-yield opportunities because the gap between current and improved state is largest. Walkthroughs of paper processes work the same as for digital ones, and the recommendations often favour digitisation only at the points where it pays for itself.

How long before I see results?

The review itself takes 4–6 weeks. The recommendations begin paying back once you act on a quick win — typically within the first quarter after the Executive Presentation. Some recommendations take longer; the Roadmap distinguishes them. Six to twelve months after the review, you can run a re-score to see what the change has actually delivered.

Is this a sales call for Failsafe to do the implementation?

No. The BPR is a paid diagnostic. You receive a written report and an Executive Presentation. Whether you implement with Failsafe, with your existing suppliers, or with someone else is entirely up to you. The introduction or statement that we never find Failsafe as the right supplier for some parts of the recommendation is consistent with how we work and how we stay vendor-neutral.

What happens to my data after the engagement?

Your raw interview notes and any data captured during the engagement are kept for the duration of the engagement plus 24 months as described in our Privacy Policy, then deleted. The anonymised findings, with your consent, contribute to our methodology and, in time, to a sector benchmark — but no identifying detail about your business is shared or published.

What if my team finds the engagement disruptive?

The fieldwork is designed not to disrupt operations. Each interview is 45 minutes; each walkthrough is 60–90 minutes. Interviews are scheduled around diaries, not the other way round, and we accommodate remote or hybrid working. If something genuinely cannot be scheduled, we re-sequence; we do not push.

Do you replace our existing accountant or technology supplier?

No. Our role is to help you see clearly. Your existing suppliers remain your existing suppliers unless a recommendation specifically calls for change, and where change is recommended, the choice of who delivers it remains yours.

What if we go ahead with the implementation?

If you choose to proceed with implementation, the £500 spent on the BPR is credited against the broader engagement. Managed Services, ongoing Quarterly Business Reviews and the Executive Dashboard are discussed after the report is delivered, not at the BPR booking stage.

Is £500 the right price for what we get?

£500 is the introductory launch price for the fixed Launch scope. The work is priced low because the first reviews are also contributing to the methodology. Once the benchmark dataset is established and the methodology matures, the price will rise to reflect the depth of the engagement; we will publish that change in advance. The current price is honest about its purpose.

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Ready to engage?

If, having read this guide, you think the BPR is the right next step, the booking enquiry is one page.

Book a Business Performance Review Re-read the methodology

Business first. Technology second.

Explore

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Failsafe Solutions

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