Summit Residential Management | Fictional company | 850 units | 4 properties | 90-day evidence window

DEMONSTRATION ONLY: All records, observations, ratings and financial values below are invented for presentation. They are not a validated OHS v1.0 run, an official scoring crosswalk, or a client outcome.

# Executive Operations Report (EOR)

Executive decision brief | Sample assessment | November 2026

## Executive summary

In this fictional example, Summit Residential Management's maintenance workflow shows avoidable rework, unclear approval escalation, incomplete vendor follow-up and an aging exception backlog. The demonstration score is 58/100, calculated using a simplified, non-production illustration. Leadership should prioritize ownership, records integrity and exception closure before automating the workflow.

## Key findings and management implications

| Finding | Operational consequence | Recommended decision |
|---|---|---|
| Duplicate ticket handling | Repeat effort and reporting uncertainty | Designate a system of record and standard ticket ID |
| Inconsistent approvals | Unnecessary waiting and unclear accountability | Approve escalation rules and accountable owners |
| Vendor evidence gaps | Limited ability to verify service performance | Require response timestamps and exception follow-up |
| Aged exceptions | Open issues persist despite apparently closed tasks | Introduce weekly aged-backlog review |

## Illustrative annual cost leakage: $85,000

| Cost component | Illustrative annual amount | Basis / limitation |
|---|---|---|
| Repeated administrative handling | $42,000 | Assumed staff hours × loaded hourly cost |
| Approval and escalation delays | $25,000 | Assumed delay volume × estimated incremental cost |
| Vendor rework and exception follow-up | $18,000 | Assumed repeat visits and coordination effort |
| TOTAL | $85,000 | Scenario estimate; not audited savings or proven loss |

Important: these estimates are hypotheses, not confirmed cash losses. Categories would require transaction-level testing for duplication and overlap before inclusion in a client-facing financial claim.

## Priority decisions

| Priority | Action | Accountable role | Timing |
|---|---|---|---|
| P1 | Name maintenance workflow owner and escalation backup | COO / Operations Lead | 0–30 days |
| P1 | Adopt single ticket reference and exception status definitions | Operations + Systems | 0–30 days |
| P2 | Require vendor acknowledgement and overdue tracking | Vendor Manager | 31–60 days |
| P2 | Review backlog aging and closure evidence weekly | Regional Managers | 31–60 days |
| P3 | Evaluate automated routing only after controls are stable | Operations + IT | 61–90 days |

## Automation readiness judgment

Conditional / not yet ready for unattended automation. Automating poorly governed approvals would amplify exceptions. First establish ownership, fallback procedures, vendor-evidence requirements, and monitoring of exception closure.

## Management decisions requested

Approve an accountable maintenance process owner; authorize a 30-day data-quality and approval-control improvement sprint; require a monthly validated leakage baseline; defer automation deployment pending evidence of stable manual controls.

## Scope, independence and limitations

This sample covers only one hypothetical workflow. The source records, score, estimated costs, and management observations are fabricated for demonstration. No independent review, client attestation, compliance assurance, or measurable savings claim is implied.