PRACTICAL WORKSHEET

The commercial maturity report card

For commercial leaders in technology services who need proposals, pricing, and delivery commitments to hold together.

Use this report card to identify where commercial risk enters the deal before delivery inherits it.

Technology service providers do not lose margin only in delivery. The leak usually starts earlier: when a proposal is copied from the last deal, scope changes without clear ownership, pricing moves without finance confidence, or delivery inherits a commitment it did not fully validate.

This report card scores the commercial workflow behind one representative proposal pattern: how work is defined, scoped, priced, planned, approved, handed over, and improved for the next deal.

Every deal is different. The commercial workflow still repeats.

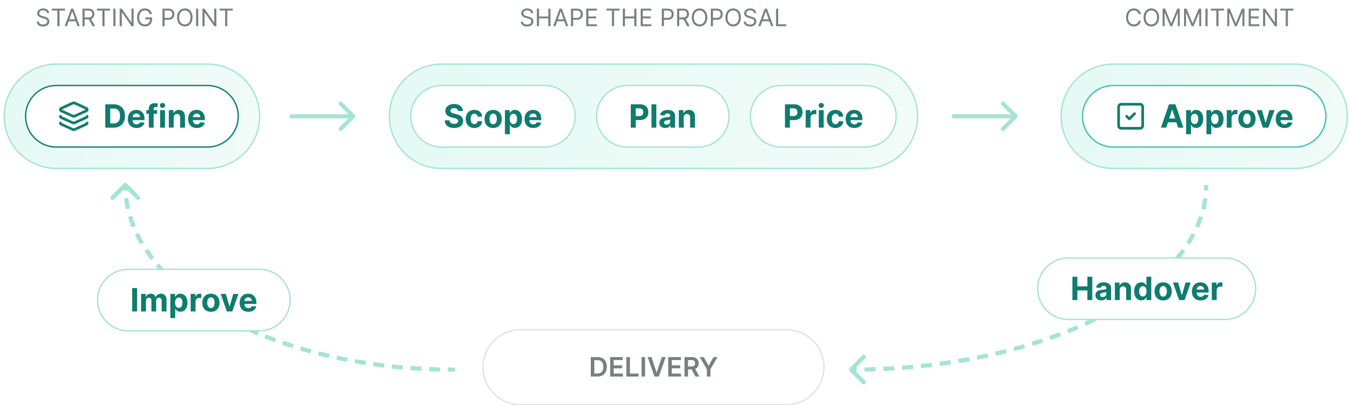
DEAL PATTERN BEING SCORED	SCORED BY	DATE

Use the language your team already uses: practice, service line, proposal type, offering, solution, package, or deal pattern.

The commercial commitment loop

A services proposal is more than a document. It is a commercial commitment that sales, delivery, finance, and leadership need to trust before delivery starts.

This report card scores the loop behind that commitment: the reusable starting point, the proposal being shaped, the commercial position being approved, the commitment being transferred into delivery, and the feedback that improves the next deal.



How to use this report card

1. Pick one representative proposal pattern. Do not try to score every service you sell.
2. Score each commercial control using evidence, not opinion.
3. Record who is involved today, who validates today, who is accountable, and what evidence supports the score.
4. Find the lowest-scoring control with the most functions involved.
5. Name one accountable owner and move that control up one level.

Useful evidence includes where the work happens, who uses it by default, who can change it, who validates it before it goes out, whether sales, delivery, and finance see the same version, and whether the result is reviewed after the deal moves forward.

If three or more functions are involved and nobody is accountable, the workflow is structurally unowned. The first action is a name, not a project.

THE MATURITY SPINE

Score each commercial control 1 to 5 based on evidence, not intent.

1. **Individual**
   Capability exists in particular people; outcomes depend on who shows up.
2. **Documented**
   Written down somewhere; use is optional and drifting.
3. **Standardised**
   One way of doing it, used by default across the team.
4. **Governed**
   Enforced with named accountability; exceptions are visible and signed off.
5. **Compounding**
   Performance data feeds back; the capability improves each quarter.

1. Define the offer

Definition is the standard starting point for the deal.

A defined offer has reusable scope, descriptions, assumptions, estimate ranges, commercial model, and proposal language. It is ready to be tailored, not blindly repeated.

SCORE ANCHORS

1 Each proposal is written from scratch, or copied from the last similar deal and edited by hand

2 A service list, practice page, or proposal template exists; what actually gets sold varies by author

3 The deal pattern has a standard starting point: scope, descriptions, assumptions, and indicative estimates

4 The starting point has an owner; changes are controlled and visible

5 Approved deal evidence feeds back into the standard starting point on a regular cadence

In Estii: Deal Composer can turn a won proposal, spreadsheet, or requirements document into a structured deal for review. Proven parts can then be promoted into the Library as reusable items, with evidence from approved deals.

SCORE, CIRCLE ONE

1	2	3	4	5
Individual	Documented	Standardised	Governed	Compounding

INVOLVED TODAY

- ☐ Sales
- ☐ Pre-sales
- ☐ Delivery
- ☐ Finance
- ☐ Leadership
- ☐ Other

VALIDATES TODAY

- ☐ Subject matter expert
- ☐ Delivery lead
- ☐ Finance
- ☐ Leadership
- ☐ Nobody

ACCOUNTABLE, ONE NAME

EVIDENCE

The artefact, meeting, system, file, or decision point you are scoring from.

2. Shape the scope

Scoping is where client requirements become a commercial delivery model.

Requirements arrive in the client's language. The profitable response maps those requirements onto work you already know how to deliver and price, then isolates the remainder. Mature scoping does not mean every deal is identical. It means variation is explicit.

SCORE ANCHORS

1 Requirements are scoped by hand, by whoever is available

2 Reference scopes exist; mapping requirements onto them is manual and drifts by author

3 Requirements are mapped to known work where possible; unfamiliar work is identified before the proposal goes out

4 Scope changes, exceptions, and assumptions are visible and validated by the right subject matter expert

5 Scope drift is reviewed by theme and used to improve the standard starting point over time

In Estii: Find in library matches plain-language requirements to reusable Library items. Library-sourced lines are marked, drift is visible when estimates move materially, and work written from scratch is easy to spot.

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3. Price the commitment

Pricing is where scope becomes a commercial commitment.

When price is calculated from scope, rates, cost, contingency, and margin, a concession becomes a scope conversation. When pricing is not connected to scope, margin is set by whoever blinked last.

SCORE ANCHORS

1 Pricing judgement is personal; margin is discovered later

2 Rates are documented; the pricing method varies by author or practice

3 One method and one rate card are used by default; estimates are reproducible

4 Discounts, charges, margin warnings, and approval expectations are visible and finance can validate the commercial shape before the proposal goes out

5 Pricing assumptions are reviewed using approved deal evidence and commercial outcomes

In Estii: Rate cards carry cost, price, and margin by role. Scope changes reprice the deal live. Adjustments record discounts and charges with buyer-facing reasons and margin impact; the commercial decision still belongs to the team.

SCORE, CIRCLE ONE

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4. Plan delivery capacity

Planning is where the proposal becomes a delivery commitment.

A deal can be well scoped and well priced but still commercially weak if the delivery organisation cannot absorb it. Mature planning connects scope, schedule, role demand, delivery feasibility, probability, and capacity visibility before the deal is signed.

SCORE ANCHORS

1 Schedule and delivery feasibility are checked informally, usually by asking delivery if the dates look possible

2 Delivery reviews major deals, but timing, role demand, and capacity impact are estimated outside the proposal workflow

3 Role demand and schedule are calculated from the scoped work, and delivery validates the plan before commitment

4 Delivery feasibility and capacity risk are visible before approval; schedule, scope, and price move together when the deal changes

5 Signed and pipeline work are reviewed together, so future capacity pressure informs commercial decisions

In Estii: Schedule and scope are connected. Scope changes update price and schedule, and forecasts can show confirmed work, probability-weighted pipeline, and exposure if open deals close.

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5. Approve the commercial position

Approval turns standards from advice into operating practice.

The basic bar is sign-off on price. The better bar is sign-off on the commercial shape of the deal: margin, scope composition, discounting, capacity risk, assumptions, and how much of the proposal is familiar, changed, or new.

SCORE ANCHORS

1 Deals go out on individual judgement; sign-off, when it happens, is a glance at the total

2 Sign-off is expected; the margin and assumptions reviewed are manually assembled, often from multiple files

3 Margin, scope, assumptions, and approval version are calculated and visible before approval

4 Approval reviews composition, exceptions, validation status, discounting, margin movement, and capacity risk

5 Stakeholders can read the live commercial position from their own lens, with the approved version and history visible

In Estii: Deals move through draft, pending approval, approved, in play, and closed states. Approvers can be named, redraft reasons are recorded, and approval shows a commercial assessment including gross margin, Library coverage, drift, and reuse grade.

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6. Hand over the commitment

Handover is where the proposal becomes delivery reality.

The question is simple: does delivery inherit the same commercial model that was approved, or do they reconstruct it after the deal is won? Handover should not depend on someone knowing that *Final_v7_sent_revised* is the real file.

SCORE ANCHORS

1 Handover is a meeting, a folder, or a message thread; delivery reconstructs what was sold

2 A handover checklist exists; quality depends on who prepares it

3 Scope, assumptions, price structure, milestones, and responsibilities are handed over consistently

4 Delivery receives the approved version, change history, exclusions, risks, validation notes, and commercial assumptions

5 Handover outcomes feed back into proposal standards, scoping rules, and governance

In Estii: The approved deal is locked as a source of truth. Versions, proposal and spreadsheet exports, payment milestones, and Jira and ClickUp exports carry structured scope and assumptions into delivery workflows.

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7. Improve the model

Improvement decides whether the other six commercial controls compound or decay.

Most teams want a feedback loop from proposal to delivery outcome. Few have one that works. Do not wait for the perfect actuals loop. Start with the signals you can capture reliably.

SCORE ANCHORS

1 Learning is anecdotal; only disasters get discussed

2 Wins get reviewed; losses and abandoned deals are filed

3 Every close is recorded with a reason, won or lost, and reviewed at a set cadence

4 Signals are split by stage: approved, redrafted, won, lost, handed over, and delivered each feed a different review

5 The commercial model improves each quarter using approved deal evidence, closed outcomes, handover friction, and delivery variance themes

In Estii: Closing a deal captures result, reason, and date. Redrafts capture reasons. Approved deals add evidence to matching Library items and propose updates for review rather than silently changing standards.

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Overall score

Transfer your score for each commercial control, then turn to the results page.

DEFINE / 5	SCOPE / 5	PRICE / 5	PLAN / 5
APPROVE / 5	HANDOVER / 5	IMPROVE / 5	TOTAL / 35

What this shows

One control is weak You have a capability gap. Look for the shared method, owner, or evidence that would improve it across future proposals.	**Low scores across the board** This deal pattern is not yet repeatable. Decide whether to make it more standard, or keep treating it as custom work.
Many people, no owner The workflow is structurally unowned. Name one accountable person before turning it into a project.	**High score, weak evidence** The maturity may be real, but it lives in people's heads. Capture where the work happens and how decisions are made.
Define is strong, Improve is weak Your standard may be getting stale. Add a regular review of what changed, what worked, and what should update the starting point.	**Approve is strong, Scope or Price is weak** The approval process may be stronger than the model underneath it. Tighten the scope or pricing method before adding more sign-off.

Four moves

Do not try to lift every score to five. Pick one or two commercial controls where the score is lowest and the number of involved functions is highest. Move one level.

1 TO 2	2 TO 3	3 TO 4	4 TO 5
Capture	**Standardise**	**Govern**	**Compound**
Get it out of heads into a document, however rough.	Collapse variants into one default. Exceptions need a reason.	Name the owner, set the approval point, and make exceptions visible.	Feed outcomes back into the standard on a cadence.
Cost: days	**Cost: weeks**	**Cost: a decision**	**Cost: a ritual**

Choose the next move

Choose the lowest-scoring commercial control with the most functions involved. Name one accountable owner. Move it up one level in the next 30 days.

MOVE	COMMERCIAL CONTROL	OWNER	REVIEW IN
1			
2			

This report card shows what your team claims.

A shared commercial system is where those claims become visible, governed, and easier to improve.

Run the same scorecard against a live proposal in Estii.

First moves for the named owner

Each move lifts a control to the level shown. Start with the control named in the commitment box.

1. Define the offer

- **2** Collect the last three proposals the team calls representative. Start from what is actually used, not the ideal template nobody opens.
- **3** Separate reusable work from precedent. Mark what becomes the default next time, and what was specific to that client.
- **4** Put your name on the starting point. When it changes, record what changed and why.

2. Shape the scope

- **3** Map requirements to known work before writing the response. Give unfamiliar work a name and estimate it separately.
- **4** Route exceptions to the right expert before they are promised to the client.
- **5** Review scope drift by theme across deals: integrations, migration, workshops, environments.

3. Price the commitment

- **2** Write down the pricing method, not just the rate card: contingency, margin expectation, discount logic.
- **4** Turn discounts into named decisions with a reason, a value, and a margin impact. Give finance something calculable, not a slide.
- **5** Track the gap between starting margin, approved margin, and closed outcome.

4. Plan delivery capacity

- **2** Name the constrained roles that limit what can be sold.
- **3** Model when those roles are needed, not only how many days they contribute.
- **5** Review signed and pipeline work together; capacity problems come from timing, not total effort.

5. Approve the commercial position

- **2** Put a gate between draft and client. It does not need to be complex. It needs to be real.
- **4** Approve the shape, not the total: what is included, what changed, what was discounted, what delivery is implicitly accepting. Record exceptions with reasons.
- **5** Give sales, delivery, and finance the same version, each through their own lens.

6. Hand over the commitment

- **3** Define the handover artefact: scope, assumptions, exclusions, risks, milestones, price structure, open decisions. Every time.
- **4** Hand over the approved version. Delivery should never infer which file was final.
- **5** After kickoff, ask delivery what they had to rediscover, reinterpret, or renegotiate.

7. Improve the model

- **2** Record every close with a result and a reason. Losses and abandonments teach more than wins.
- **4** Split signals by stage: approved, redrafted, won, lost, delivered each feed a different review.
- **5** Review by theme, not line item, on a fixed cadence. Improvement is a recurring decision, not a dashboard.