

Meridian Agency

Operational Intelligence Briefing

APRIL 1, 2026 · GT · OB · Q12026 · V7 · 9CABD2

Meridian Agency's growth is currently constrained by activation drag in the client onboarding funnel.

The account reads as constrained at the activation step. New client volume entering the top of the funnel remains sufficient — the bottleneck sits between proposal acceptance and first billable engagement. Clients are signing but not activating at the rate the revenue model requires.

The most likely driver is the onboarding sequence introduced in January. Time-to-first-deliverable extended from 4 days to 11 days following the process change. Activation has not recovered. The constraint is operational, not demand-side.

Resolving this constraint is presently projected to add +\$28K per month, roughly +\$336K per year if conditions persist, with a break-even window of 18 days.

— *The forecast reflects this condition directly.*

Resolves toward +\$28K per month under the present constraint.

Range: conservative +\$14K · aggressive +\$44K · per month

Under the current constraint, the next 90 days resolve toward this trajectory as a base-case interpretation of the next ninety days. It is not a guarantee, and the moves below are how the interpretation becomes operational.

COUNTERFACTUAL READING

Base case. The base reading currently resolves toward +\$28K per month of incremental revenue under the constraint as diagnosed.

If conditions soften. The conservative counterfactual reads as +\$14K per month — operational uptake slower than presently observed.

If conditions accelerate. The aggressive counterfactual reads as +\$44K per month — uptake faster than presently observed.

Range reflects observed week-over-week activation variance over the trailing eight weeks.

If the constraint is left in place: Continued degradation of client lifetime value as early-engagement churn compounds through Q2.

— *The evidence underlying this interpretation:*

SECTION III — Evidence & Calibration

The data substrate reads as high — all five revenue integration points active and current.

Activation is the binding constraint. The funnel narrows here before any pricing or service-fit signal is tested — every downstream metric carries this drag.

ACTIVATION RATE · 38%

Time-to-first-deliverable has nearly tripled since January. Clients who activate slowly churn at 2.4x the rate of clients who activate within 5 days.

PROPOSAL-TO-ACTIVATION TIME · 11 DAYS

Retention is holding but showing early deterioration. The cohort onboarded under the new process has a 90-day retention rate 14 points below the prior cohort.

CLIENT RETENTION RATE · 71%

Revenue has plateaued for three consecutive months despite consistent new client volume. The plateau is activation-driven, not demand-driven.

MONTHLY RECURRING REVENUE · \$83,400

— *These conditions carry operational implications.*

SECTION IV — Strategic Moves

The following are the operational consequences of the interpretation above. They are sequenced by leverage against the diagnosed constraint, not by ease of execution.

MOVE 01 **Revert the onboarding sequence to the pre-January process**

OPERATIONS · WEEK 1

The January process change is the single most likely driver of activation drag. Reverting is low-risk, immediately reversible, and concentrates the lift in the first 30 days where client churn risk is highest.

Operational lift: +\$18K/mo.

MOVE 02 **Instrument time-to-first-deliverable as a primary operational metric**

OPERATIONS · WEEK 2

This metric does not currently exist in the operational dashboard. Without it, the next process change will carry the same blind spot. Instrument it before making any further onboarding modifications.

Operational lift: +\$6K/mo.

MOVE 03 **Assign a dedicated activation owner to every new client for the first 14 days**

CLIENT SERVICES · WEEK 3

Early-engagement churn is concentrated in clients who do not receive a structured touchpoint in the first week. A named activation owner reduces this risk without requiring a process overhaul.

Operational lift: +\$4K/mo.

— *What we track against this interpretation:*

SECTION V — Verification & Calibration

FORECAST ACCURACY

78 / 100

PERIOD REVIEWED

Feb 2026

FORECAST

\$100,000

ACTUAL OUTCOME

\$92,000

VARIANCE

-\$8,000 (-8%)

CALIBRATION READING

Supportive of the operational interpretation above. The forecast landed within observable range. This calibration record informs the confidence basis for the current briefing.

SECTION VI — Operational Continuity

DATA SOURCES

Stripe — fresh as of 2026-03-01. HubSpot CRM — fresh as of 2026-03-01. Google Analytics 4 — fresh as of 2026-02-28. Zapier Ops Log — fresh as of 2026-02-27. Internal Project Tracker — fresh as of 2026-02-26. All 5 revenue integration points active and current.

OPERATING ASSUMPTIONS

Pricing remains flat through Q1. New client volume holds at current rate.

RISK FLAGS

Onboarding regression unresolved — constraint will compound if not addressed within 30 days.

WHAT THIS BRIEFING DOES NOT CLAIM

This is a fictional demonstration briefing. All business names, figures, and operational data are illustrative. Growth Terminal LLC.

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