Business Rollout Catalog

Systems replacement and modernization for executive teams.

- Operating systems for: Operations, Accounting, Marketing, HR, Legal, Strategy, Product + IT

- End-to-end rollout: audit, architecture, build, launch, governance

- Designed to replace outdated workflows - not stack more tools

What This Catalog Covers

This catalog outlines how ControlPoint AI Firm rolls out modern operating and decision systems across core business functions. The objective is simple: replace outdated workflows with infrastructure that executives can trust - fast, auditable, and built to scale.

Outcomes You Can Expect

- A clear map of how work actually flows today - and where it breaks.
- A future-state operating system designed around decisions, execution, and accountability.
- Automations that remove manual reporting, handoffs, and spreadsheet dependency.
- Executive dashboards that surface risk early and make performance visible.
- Governance controls so the system runs reliably (and safely) without heroics.

Principles

- **Replace, don't patch.** We fix root systems issues instead of stacking more tools on top.
- **Executive-grade clarity.** The system is built around decisions leaders must make - not vanity metrics.
- **Owned by you.** Documentation, control logic, and operating playbooks are delivered so you can run it.
- **Secure by design.** Access, logging, and approvals are built in from day one.

Rollout Framework

Most failures happen at the handoff between 'strategy' and 'execution'. Our rollout model is designed to close that gap - from discovery through launch, with clear deliverables at every phase.

Phase	Goal	Key Deliverables
0. System Audit	Map reality and identify control points	Process map, data inventory, bottleneck analysis, risk register, modernization plan
1. Architecture	Design the replacement system	Future-state workflows, decision models, integration plan, KPI framework, governance design
2. Build + Integrate	Implement the system inside your environment	Automations, dashboards, integrations, role-based access, logging and controls
3. Launch + Train	Operationalize the system	Go-live plan, training, SOPs, escalation paths, cutover from legacy tools
4. Stabilize + Optimize	Measure, harden, and improve	Performance tuning, adoption tracking, monthly health checks, continuous improvement backlog

Go-Live Criteria

- Legacy process has a documented replacement path (no hidden dependencies).
- Roles and permissions are verified (least-privilege access).
- Dashboards and reports match executive definitions (single source of truth).
- Fallback plan exists for critical workflows during cutover.
- Training completed for owners and operators.

Domain Modules

Engagements are built from modular replacements. Teams can roll out one domain first or modernize multiple functions in parallel. Below are examples of systems we commonly deploy.

Domain	What We Replace	What We Deploy
Operations	Manual status meetings, scattered SOPs, reactive firefighting	Workflow automation, execution dashboards, KPI control system, incident/escalation playbooks
Accounting & Finance	Spreadsheet close, delayed reporting, manual reconciliations	Automated reporting, reconciliation workflows, forecasting models, financial governance dashboards
Marketing	Disjointed campaign tracking, unclear attribution, manual reporting	Performance intelligence, attribution clarity, automated reporting, lead routing and lifecycle systems
Human Resources & Recruiting	Email-based hiring, inconsistent scoring, manual onboarding	Recruiting pipeline system, structured evaluation, onboarding workflows, performance tracking
Legal & Compliance	Ad-hoc document control, policy sprawl, reactive compliance	Compliance workflows, documentation control, audit-ready logging, risk monitoring dashboards
Strategy & Executive Planning	Static decks, siloed metrics, slow planning cycles	Executive scorecards, scenario models, planning cadences, decision frameworks
Product Development & IT	Shadow tools, brittle integrations, unclear ownership	Integration architecture, internal tools, system modernization roadmap, technical governance

Common System Artifacts

- Operating playbooks (SOPs) and escalation paths
- KPI dictionary and metric governance (definitions, owners, refresh cadence)
- Data dictionary and integration map
- Dashboards for executives and operators (role-based)
- Audit logs, approval flows, and change control for critical decisions

Governance, Security, and Reliability

Replacing systems means replacing risk. Governance is built into every rollout so executive teams can trust the outputs and operators can trust the process.

Controls We Build In

- **Role-based access** with least-privilege permissions.
- **Approval workflows** for financial, legal, and operational control points.
- **Audit logging** so decisions and system changes are traceable.
- **Monitoring** for failures, latency, and data freshness.
- **Fallback paths** for mission-critical workflows during transitions.

Change Management

- Stakeholder alignment and ownership (who runs the system after launch).
- Training for executives (decision interpretation) and operators (daily execution).
- Cutover planning to retire legacy tools without interrupting delivery.
- Adoption tracking to ensure the system actually gets used.

What We Will Not Do

- We will not sell you another tool and call it transformation.
- We will not hide critical logic inside black boxes you cannot govern.
- We will not leave you with systems that require heroics to operate.

Readiness Checklist

To move quickly, we align on stakeholders, access, and definitions up front. This checklist keeps rollouts fast and clean.

What We Need From You

- Executive sponsor and domain owners for each function in scope.
- Access to current reports, dashboards, spreadsheets, and SOPs (even if messy).
- Tooling list (ERP, CRM, HRIS, ticketing, analytics, etc.) and where data lives.
- Definition of success (your top metrics and decisions that matter most).
- Security/compliance constraints we must operate inside.

Kickoff Deliverable

Executive Systems Review - a structured assessment that identifies what to replace first, what to keep, and how to sequence the rollout for maximum leverage.

Next Step
If you're ready to replace outdated systems and build infrastructure that scales, start with an Executive Systems Review.

Contact
Add your preferred contact link or email here.

Note: Scope and sequencing are tailored to each organization. This catalog describes a standard rollout model and the most common system modules.