



PCW-CASE-001 · PAPERCHASE CONSULTING · PAPERCHASEWEBB, INC.

From Tool Sprawl to a Governed Operating Layer

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entity: PaperChaseWebb, Inc. surface: PaperChase Consulting

Case study · PCW-CASE-001 · August 2026 PaperChase Consulting · PaperChaseWebb, Inc. · Honolulu

Method: PSOF v1.0 (PCW-PSOF-001) Path: T0 → A1 → B1 → C1 Status: Representative engagement pattern (anonymized).
Figures are method-shaped targets, not a named client's audited financials. Real commercial offers match the live package ladder on paperchaseconsulting.com.

SNAPSHOT

FIELD	VALUE
Profile	Multi-location service operator (clinical / professional services pattern)
Pain	SaaS sprawl, no service owners, reactive incidents, AI pilots without authority
Entry	Free scorecard (T0) → Systems Ops Audit (A1 · \$1,000)
Build	14-Day Controlled Automation Sprint (B1 · from \$5,000)
Continuity	Managed Systems Operations (C1 · from \$1,500/mo) or Operator Retainer A2 (\$100/hr)
Method	PSOF eight domains · maturity 0–5 · production gates · AI authority ladder

1. SITUATION

A multi-location operator had grown by adding tools: CRM, scheduling, billing, messaging, a dashboard no one trusted, and two AI “assistants” that could draft messages but had no defined authority class.

What leadership could not answer cleanly:

- Which systems are critical services, and who owns each?
- What fails first when staff call out or a vendor has an outage?
- Have restore tests proven recovery — or only backup checkmarks?
- Which automations are allowed to write to production, under what policy?

Founder time was the control plane. That does not scale.

2. APPROACH (PSOF)

PaperChase Consulting did not start with “more AI.” We applied the PaperChase Systems Operations Framework (PSOF v1.0):

1. ■ **Business service first** — map tools to services, owners, and user impact.
2. ■ **Evidence over assertion** — score maturity only where evidence exists.
3. ■ **Observability before autonomy** — no new production write paths until visibility and rollback exist.
4. ■ **Paid structure** — diagnose, stand up, maintain — no free multi-thread labor.

Public method: <https://paperchaseconsulting.com/whitepaper>

3. ENGAGEMENT PATH

PHASE 0 · QUALIFIER (T0)

Free Systems Operations Scorecard across eight domains (0–5). Leadership self-scored honesty, not optimism.

Typical composite result for this pattern:

DOMAIN CLUSTER	SCORE BAND	SIGNAL
Governance & assets	1–2	Owners incomplete; inventory tribal
Observability & incident	1–2	Customer-reported failures common
Security & identity	2	Access reviews irregular
Automation & AI	1	Tools without system cards or eval
Continuity	1	Backups present; restore unproven
Cost & suppliers	2	Renewals reactive

Overall maturity: ~1.5–2.0 / 5 (Visible–Controlled gap).

PHASE 1 · SYSTEMS OPS AUDIT (A1 · \$1,000)

Fixed SMB audit under PaperChaseWebb, Inc.:

- Eight-domain maturity scores with evidence notes
- Top three operational risks (example pattern: no service catalog; untested restore; agent write access without least privilege)
- Current / target profile for 90 days
- Control-and-value roadmap (what to build first, what not to automate yet)
- Credit path: 100% of A1 fee toward B1/B2 if contracted within 14 days of findings

PHASE 2 · CONTROLLED SPRINT (B1 · FROM \$5,000)

One bounded workflow — not a wishlist:

Example scope (pattern): Lead intake → qualified follow-up queue → owner assignment → evidence receipt in CRM, with monitoring and rollback.

Gates applied (lite G0–G5):

- Design approved before production write access
- Monitoring and runbook before go-live
- Acceptance with named owner and support boundary
- Optional maintain sold separately

PHASE 3 · CONTINUITY (A2 OR C1)

OPTION	WHEN	ECONOMICS
A2 Operator Retainer (Lite)	Light hours, founder still close	\$100/hr · \$500 per 5 hours · \$500–\$1,000/mo · first of month
C1 Managed Systems Operations	After build acceptance	From \$1,500/mo · windowed support · monthly evidence pack

No managed ops without current docs, access, and billing authorization (PSOF hard rule).

4. OUTCOMES (METHOD TARGETS)

These are the outcomes PSOF is designed to produce. Named client metrics are published only with written approval.

OUTCOME	BEFORE (PATTERN)	AFTER TARGET (90 DAYS)
Service ownership	Tribal / founder	Named owner per critical service
Maturity band	~1.5 Unknown–Visible	≥2.5 Controlled on priority domains
Automation	Ad hoc scripts / AI drafts	One production workflow with authority class + eval
Continuity	Backup checkbox	Restore exercise scheduled and logged
Commercial	Free favors / unclear hours	Written package + first-of-month retain

Commercial integrity for PaperChaseWebb, Inc.:

- Contracting entity explicit on invoice
- Net 15 standard
- Credit of A1 into B1/B2 within 14 days when applicable

5. WHAT WE DID NOT DO

- Sell certification stamps without control work
- Grant agents production authority without A0–A4 classification
- Absorb unpaid multi-thread “piece of the pie” work
- Promise 24/7 response without a staffed C2/D plan

6. LESSONS (OPERATOR)

1. ■ **Score before sell automation.** T0 and A1 prevent building the wrong workflow.
2. ■ **One workflow beats three half-wired tools.** B1 scope discipline protects both parties.
3. ■ **Maintain is a product.** A2 at \$100/hr and C1 retainers replace free friendship labor.
4. ■ **Public method builds trust.** White paper (PCW-WP-001) and package ladder reduce sales ambiguity.

7. HOW TO RUN THIS PATH YOURSELF

STEP	OFFER	LINK
1	Free scorecard	https://paperchaseconsulting.com/scorecard
2	Fit call (optional)	https://paperchaseconsulting.com/contact#book
3	Systems Ops Audit · \$1,000	https://paperchaseconsulting.com/contact
4	Sprint / Deploy / Retain	https://paperchaseconsulting.com/packages
Method	White paper	https://paperchaseconsulting.com/whitepaper
Tiers pitch	Pitch deck	https://paperchaseconsulting.com/pitch

DOCUMENT CONTROL

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