



Before you start the Signal Diagnostic intake

The intake takes about five minutes and opens after payment. Everything it asks is listed here so you can gather what you need first. The five-business-day clock starts once we have both the intake and your financial documents.

GATHER FIRST

Profit & loss and balance sheet, most recent full year plus year-to-date. If you have them, an A/R aging summary and revenue by customer make the diagnostic sharper — but don't hold up submitting to hunt for them. Up to 4 files, 8 MB total, as PDF, Excel or CSV. Your documents go directly to the firm's senior reviewer and are never stored on this website's servers.

STEP 1 — ABOUT YOU

- Your name
- Company
- Work email
- Your role (optional)

STEP 2 — ABOUT THE BUSINESS

- What does the business do?
- Approximate annual revenue
Under \$3M · \$3M-\$10M · \$10M-\$25M · \$25M+
- Team size
Just me · 2-10 · 11-50 · 50+
- Where does it feel most broken right now?
Financial reporting / visibility · Workflows, SOPs & manual data entry · Client intake & onboarding · Roles, handoffs & who owns what · Pricing & job profitability · Too much runs through me · Something else

STEP 3 — ABOUT THE BOTTLENECK

- Describe the bottleneck in your own words.
- What tools or systems are involved? (optional)
- How urgent is this?
Costing us now — need this fixed fast · Important but not on fire · Exploring options
- How did you find Signal Strategy? (optional)
Referral · LinkedIn · Search · Other

STEP 4 — YOUR FINANCIALS

- Does your business handle protected health information (patient or medical data)?
Healthcare businesses are welcome. The diagnostic works entirely from financial statements — it never needs patient-level data, and documents containing patient information can't be accepted.
- Attach your financials (optional)
See "Gather first" above.
- Are your books kept on a cash or accrual basis?
Accrual · Cash · Not sure

What happens next. Within minutes — You get a confirmation email from advisory@signalstrategy.ai. If you didn't attach your financials, it tells you where to send them. **Within two business days** — We read your numbers and, if anything is missing, send one short round of questions by email. Reply when you can — the confidence of the findings depends on your answers. **Within five business days** — A PDF from advisory@signalstrategy.ai — read, edited and signed by Ryan Funke, CFA. Findings with confidence labels, a scorecard, and up to three fixes ranked by effort against return. **Around day 10** — A short email asking whether the findings raised questions. If you want help acting on them, it includes a written retainer offer. **14 and 60 days** — If we found nothing material and you're not satisfied, tell us within 14 days and the fee is refunded. If you start a Strategic Retainer within 60 days, your diagnostic fee is credited in full across your first two months.