bevel & sloane

FIRM OVERVIEW
B&S-C01

UNSTUCK

L&D + OPS

OPERATIONS ARCHITECTURE & WORKFORCE ENABLEMENT

SYSTEMS THAT RUN *Without* THEIR BUILDER

Fractional operations and learning advisory for growing companies of 10 to 250+ people. We document how your work runs, build the training around it, and hand it to someone on your team.

1 Founder story

2 Philosophy and the four pillars

3 Apprentice Succession Model

4 Tiers, pricing and how to start

DOCUMENT	VERSION	ISSUED	PREPARED BY
B&S-C01	1.0	November 2026	Bevel & Sloane

FOUNDER STORY

FROM ENTERPRISE INFRASTRUCTURE TO MID-MARKET SCALE

"Most organizations do not struggle to scale due to a lack of talent or ambition. They stall when informal communication reaches its structural limit."

Our founder's career has centered on how teams learn, align and execute at scale. It started in enterprise customer operations, auditing user journeys and codifying frontline knowledge. Later, as a Former Learning Operations Specialist at Uber, the work covered operational readiness, partner governance and international site launches. Supporting large, distributed teams at that speed made one thing obvious: when fast moving teams rely on memory and informal shadowing, drag is inevitable.

The catalyst for Bevel & Sloane was closer to home. A close friend was growing a sales driven business faster than its operations could keep up. Senior closers were being pulled off the field to shadow new hires, new reps lacked technical fluency, and early turnover was climbing.

What was meant to be a quick fix became more. We mapped the full customer lifecycle, wrote modular field SOPs, replaced ad hoc shadowing with targeted digital learning modules, and shifted hiring toward quality over volume. Ramp cycles shortened and senior sellers went back to closing.

That one project showed a gap. Mid-market companies have outgrown 1:1 shadowing, but they do not need an enterprise consultancy or a premature six figure executive hire. They need precise operational architecture, built by someone who understands the floor.

FOUNDER

Founder led

You work with the founder directly

Former Learning Operations Specialist at Uber. Operational readiness, partner governance, international site launches.

Enterprise customer operations. User journey audits and frontline knowledge architecture.

The founder's former team received the Full Sail Team Award through Uber's 2026 Global L&D Recognition Program.

A FOUNDING ENGAGEMENT

70% drop in attrition

30% monthly increase in sales

Results from one engagement. Every business is different.

OUR PHILOSOPHY

HOW WE APPROACH WORK

i.

Systems Over Band-Aids

Training alone rarely fixes an operational breakdown. The mechanics usually need fixing first. We build clean, modular workflows and documentation that make everyday execution straightforward.

ii.

Protecting Bandwidth

Your most experienced people should be driving growth and revenue, not stuck in endless 1:1 onboarding. Every process we streamline gives high value hours back.

iii.

Built for Independence

A good operational system should run without its builder. Every engagement ends with clear documentation and a full handoff, so your team owns it with confidence.

THE GAP WE FILL

TOO BIG TO WING IT. TOO EARLY FOR A FULL TIME COO OR CHIEF LEARNING OFFICER.

80%

of workers say they lack the time or energy to do their work.

Microsoft Work Trend Index, 2025

49%

of L&D leaders say executives worry employees lack the skills to execute strategy.

LinkedIn Workplace Learning Report, 2025

1 in 10

small business workers were offered formal AI training, while half use AI.

US Chamber of Commerce Foundation and Ipsos, June 2026

SELF CHECK · SIGNS YOU HAVE OUTGROWN INFORMAL OPERATIONS

- ○ New hires learn by shadowing whoever has time.
- ○ Key processes live in one or two people's heads.
- ○ SOPs are missing, outdated, or nobody opens them.
- ○ You pay for an LMS that few people use well.
- ○ Handoffs between sales, operations and delivery break.
- ○ Nobody can show what training does for the business.

WHAT WE DO

FOUR PILLARS, BUILT AS ONE SYSTEM

Training alone rarely fixes an operational breakdown. The mechanics usually need fixing first. So we work on workflows, documentation, learning and measurement together.

01

Operational Diagnostic & Friction Triage

Before anything gets written, we find out how the work really moves. We interview the people who carry the operation, shadow the roles that matter and audit what is already documented.

- Stakeholder interviews across leadership and the front line
- Shadowing of key roles and handoffs
- A friction triage audit, ranked by cost and effort
- A recommended build plan you can act on

What you keep. A ranked friction map and a build plan, in plain language, owned by you.

02

SOP & Knowledge Architecture

We extract the tribal knowledge and write it down in a structure people can find, follow and keep current. Modular SOPs, one source of truth, a named owner and a version on every page.

- Core SOP drafting with the people who do the work
- A documentation architecture: where things live and who owns them
- Workflow and handoff redesign between teams
- Version control and a review cadence

What you keep. A living SOP library with owners, versions and a review rhythm your successor runs.

03

Onboarding Academy & L&D Systems

We replace ad hoc shadowing with a structured onboarding academy. Short modules, clear sign offs and a tool stack calibrated to how your people actually learn.

- An L&D onboarding framework and a pilot cohort
- A full onboarding academy with interactive modules
- Tool stack calibration: LMS, workflow tracking, automated handoffs
- Upskilling tracks and role certification paths (later tiers)

What you keep. An onboarding academy your managers can run without pulling a top performer off the floor.

04

KPI, Governance & Handover

Systems drift unless someone measures them. We set the KPIs, cadences and governance that keep the operation honest, then hand the whole thing to the successor we trained alongside you.

- KPI dashboards tied to ramp time, quality and retention
- Cross department governance and meeting cadences
- Vendor management frameworks
- Phased handover to your internal successor

What you keep. Dashboards, cadences and a successor who already runs them before we step back.

HOW HANDOVER WORKS

THE APPRENTICE SUCCESSION MODEL

Every engagement is designed to end. By Day 30 you name an internal operational successor who co-pilots every build with us. By the time we step back, the person running your systems is someone on your payroll who helped build them.

DAY 1	BY DAY 30	BUILD PHASE	HANDOVER PHASE	CLOSE
Kickoff	**Successor named**	**Co-pilot**	**Successor leads**	**Full handover**
Diagnostic, interviews and shadowing begin.	Your internal lead joins every build.	Weekly shadowing and live execution reviews.	They run day to day; we review.	Your team owns and runs the system.

THE LOW RISK WAY TO START

THE OPERATIONAL DIAGNOSTIC

A focused two week engagement to find where your operation is leaking time, quality and people. You get a clear read on what is broken, what to fix first, and which advisory tier, if any, fits your stage.

- ○ Stakeholder interviews across leadership and the front line
- ○ Workflow shadowing and friction triage
- ○ Review of SOPs, onboarding and learning tools
- ○ Written findings and a prioritized fix list

INVESTMENT

$5,000

Two weeks. 100% of the fee is credited toward a 3 or 6 month advisory commitment if you continue.

"A well designed operational system should thrive without its builder."

From our philosophy, Built for Independence. The successor model is how we make that true in practice.

ADVISORY TIERS

FOUR COMPOUNDING TIERS

Each tier includes everything in the one before it. All tiers run at 10 to 12 dedicated advisory hours per week. Your monthly retainer within each range is set by headcount.

TIER 01 · 3 MONTHS

The Prelude

$4,500 to $6,000 / month · $13,500 to $18,000 total

- **The foundation, phased by month:**
- Month 1: operational diagnostic, stakeholder interviews and friction triage audit
- Month 2: core SOP drafting, documentation architecture and workflow handoff redesign
- Month 3: L&D onboarding framework, pilot cohort and a 90 day stabilization plan

TIER 02 · 6 MONTHS

MOST POPULAR

The Blueprint

$5,000 to $6,650 / month · $30,000 to $40,000 total

- **Includes everything in The Prelude, plus:**
- Department workflow mapping, redesign and cross functional friction triage
- Full new hire onboarding academy with interactive learning modules
- Tool stack calibration: LMS, workflow tracking, automated handoffs
- Weekly 1:1 successor shadowing and live execution reviews

TIER 03 · 9 MONTHS

The Ensemble

$5,300 to $6,650 / month · $48,000 to $60,000 total

- **Includes everything in The Blueprint, plus:**
- Cross department handoff protocols and governance: Sales to Ops to Delivery
- Upskilling tracks and custom team curricula
- Phased leadership handover: your successor leads day to day under review
- KPI dashboards, vendor management frameworks and meeting cadences

TIER 04 · 12 MONTHS

The Residency

$5,800 to $7,500 / month · $70,000 to $90,000 total

- **Includes everything in The Ensemble, plus:**
- Infrastructure overhaul for high scale or M&A readiness
- Automated L&D ecosystem with role certification tracks
- Full operational handover to your internal successor
- Board reporting frameworks, annual systems health audit and a multi year roadmap

RETAINER CALIBRATION

HEADCOUNT BANDS

Monthly retainers by tier and company size. Larger teams have more departments, more tools and more handoffs to govern.

HEADCOUNT BAND	TYPICAL STAGE	PRELUDE	BLUEPRINT	ENSEMBLE	RESIDENCY	TOTAL CONTRACT RANGE
Boutique / Seed 10 to 35 FTEs · low end	Flat hierarchy, founder led operations. Workflows are quick to audit and SOPs are adopted fast.	$4,500	$5,000	$5,300	$5,800	**$13,500 to $70,000**
Emerging Mid-Tier 36 to 85 FTEs · mid point	First layer of middle management. Onboarding friction surges, handoffs start breaking, tribal knowledge scatters.	$5,200	$5,800	$6,000	$6,600	**$15,600 to $79,200**
Established Mid-Market 86 to 250+ FTEs · top end	Multiple department heads, complex tech stack (LMS, HRIS, CRM, ERP), cross department governance needed.	$6,000	$6,650	$6,650	$7,500	**$18,000 to $90,000**

WORKING STANDARD

WHAT EVERY ENGAGEMENT INCLUDES

01 **10 to 12 dedicated hours a week**
Fractional executive advisory and hands on delivery.

02 **Weekly executive calibration**
One 60 minute alignment session by video, every week.

03 **Dedicated Slack channel**
Asynchronous access with triage within 24 business hours.

04 **An internal successor**
Named by Day 30 and trained through every build.

05 **Clear contracts**
A Master Services Agreement and a phased Statement of Work.

06 **Simple billing**
Billed monthly in advance on the 1st. Either side may end with 30 days written notice.

07 **You own the work product**
Custom SOPs, curricula and playbooks become yours on full payment.

08 **Founder led delivery**
You work directly with our founder, start to finish.

NEXT STEPS

WHAT TO DO WITH YOUR *results*

If you checked three or more of the signs on page 03, your operation has likely outgrown informal knowledge sharing. Here is how to start.

01 **Book a Discovery Session**

A conversation about where your operation is today, what is breaking, and what you have already tried. No preparation needed.

02 **Start with the Operational Diagnostic, or go straight to a tier**

Two weeks and $5,000, credited in full toward a 3 or 6 month commitment. If the fit is already clear, we scope a tier directly.

03 **Sign the MSA and phased SOW**

One agreement governs the relationship. The SOW sets the tier, duration, deliverables by month and your retainer.

04 **Kick off and name your successor**

Work begins on the 1st of the month. Your internal successor is named by Day 30 and co-pilots everything after.

FREE CALL

BOOK A DISCOVERY SESSION

START WITH A DISCOVERY SESSION.

Tell us where the friction is. We will tell you honestly whether a diagnostic, a tier, or neither is the right next step.

BOOK ONLINE
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Bevel & Sloane
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