

EXPERT INTERVIEW — DANA WHITFIELD, PARTNER (TRANSCRIPT EXTRACT)

Interview 1 of 3 · Recorded 14 August 2026 · Subject: how Dana runs a profitability review

Interviewer: Marcus Ellery, Practice Development

Q: Walk me through what happens in the first week.

DANA: Before I look at a single number I write down the decision the client has to make at the end. If I cannot name that decision in one sentence, the engagement is not scoped yet.

DANA: The data request goes out in week one and it never changes: three years of revenue by client and by service, staff cost by person with utilisation, and the last eight proposals they won and lost.

DANA: I will not start the diagnostic until the finance lead has signed the data request as complete. Starting on partial data is how these engagements run long.

Q: How do you actually build the diagnostic?

DANA: I rebuild margin from the bottom up, engagement by engagement, rather than accepting the client's own reported margin.

DANA: Every number in the model has to trace to a client file, and I note the file name in the cell comment so the team can defend it in the room.

DANA: I look for three patterns every time: work sold below the cost of delivering it, clients who consume partner time without paying for it, and service lines that only look profitable because overhead is spread evenly.

Q: What happens when the numbers are ready?

DANA: I never send the findings. We run a two hour validation workshop with the owner and the finance lead and we argue with the numbers together.

DANA: The test for leaving that workshop is simple. The client can restate the three biggest margin leaks in their own words without looking at my slides.

DANA: If they cannot, the finding is not landed and I rework it before it goes into the report.

Q: And the recommendations?

DANA: Every recommendation carries a dollar value, an owner inside the client, and a date. A recommendation without those three things is an opinion.

DANA: I sequence them so the first thing they do pays for the engagement inside ninety days.

DANA: Then I hand it over. I book a thirty and a ninety day review at the time we present, not afterwards, because afterwards never happens.

Q: What goes wrong when someone else runs this?

DANA: They present the client's own reported margin back to them, which the client already knew, and nothing changes.

DANA: The other failure is a forty page report. The deliverable is a decision document, not a record of our work.