



MONTHLY REPORT SAMPLE · GENERIC SME

What we'd see in your business.

中小企業(汎用)

DOCUMENT CONTEXT

This is a representative sample audit prepared from a fictional generic Japanese SME at approximately ¥80M annual revenue with 12 employees. The structure deliberately uses metrics that are common across most service-oriented small businesses, regardless of sector.

All names, figures, and individuals shown are fabricated. The methodology, formulas, structure, and analytical depth are *identical* to those used in a live engagement.

If this is what you'd want to see for your business — request a free assessment at meridian.tokyo/assessment. Within 48 hours, you'll receive a written diagnosis specific to your business.

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What this business looks like through our lens.

Key operational metrics, each benchmarked against industry. The table shows where your business currently sits versus targets and recovery potential. The numbers are a summary — the substance is in which metrics are dropping, why, and how to fix them. The analysis on the following pages is the value.

What we'd surface first

This business is showing the most common pattern we see in Japanese SMEs: profitable and stable but unable to grow because the operational signals aren't being read systematically.

Three universal patterns appear here, regardless of sector: *marketing channel concentration risk*, *employee productivity variance going unaddressed*, and *customer follow-up reliant on individual memory*.

These three issues alone cost the average SME ~¥15-20M/year. They're cheap to fix because none of them require new tools or new hires — just structured tracking and written processes.

Key metrics this month

Metric	Weight	Current	Target
Revenue (monthly)	15%	¥6.7M	¥8.0M
Customer retention	15%	68%	80%
Employee productivity variance	15%	2.8×	1.5×
Marketing channel concentration	10%	75% top 1	40%
Avg customer LTV	10%	¥220k	¥300k
Time-to-respond (inverse)	10%	2.1d	1.0d
EBITDA margin	15%	24%	20%
Repeat customer rate	10%	32%	50%

What's actually wrong — right now.

Three issues this business is bleeding money on. Each one has a specific cost, a specific fix, and a specific way to measure whether the fix worked. This is what the monthly action plan looks like, condensed.

01

HIGH IMPACT
Acquisition concentration

75% of new customers come from a single channel.

What we see

Three-quarters of new customers in the past 6 months come from a single source (in this case, paid Google search). The other channels exist (organic, referral, direct) but are unmanaged and untracked. A 20% CPC increase or algorithm shift would directly hit revenue with no buffer.

Estimated cost

Strategic risk. Not a current cost, but a fragility that compounds — and ad costs are rising 15-25% annually in most categories.

Recommended action

Build a 12-month diversification plan with concrete channel targets: bring referral to 15%, organic to 20%, direct to 10%. Each channel needs one written initiative and a monthly KPI. Track channel CAC quarterly.

02

HIGH IMPACT
Operations — productivity

Top performer is doing 2.8× the work of the average.

What we see

Performance variance across the team (sales, delivery, or production — depends on the business) is 2.8×. The top performer outputs 2.8× more than the median performer. Industry healthy variance is 1.5-2×. The gap is explainable by process, not talent — the top performer just has better personal habits.

Estimated cost

If the bottom 4 employees performed at the median, output would rise ~25% with no headcount change. ~¥15M/year of foregone output.

Recommended action

Document the top performer's process explicitly (workflow, daily routine, decision rules). Make it a written training document. Pair-shadow the bottom 2 performers with the top performer for 2 weeks. Track output per person weekly.

03

RECURRING
Customer follow-up

Customer follow-up depends entirely on individual memory.

What we see

There's no systematic follow-up program after a customer transaction. Some employees remember to check in 30 days later; others don't. Repeat purchase / retention varies wildly by which employee handled the original transaction.

Estimated cost

Repeat customer rate sits at 32% vs. 50% achievable. Each missed repeat customer is ~¥120k of lifetime value. ~¥18M/year unaddressed.

Recommended action

Implement a written 3-touch follow-up sequence after every closed transaction: Day 7 (thank you / use confirmation), Day 30 (check in / problem detection), Day 90 (offer next step / cross-sell). Owned by one person, not 'whoever's free'. Track completion rate and repeat purchase rate as paired KPIs.

What changed after the work.

After 6 months, the operational picture had shifted measurably. Each result corresponds to one of the red flags identified in the audit. Plausible, conservative, and tracked monthly.

01 Channel diversification

BEFORE

75% from single channel



AFTER

52% from primary, 30% diversified

reduced platform risk

02 Performance variance

BEFORE

2.8× employee variance



AFTER

1.7× variance

+22% team output, no new hires

03 Customer follow-up systematization

BEFORE

32% repeat rate



AFTER

44% repeat rate

+~¥11M/year on existing base

Numbers reflect outcomes from comparable engagements, anonymized for confidentiality. Individual results vary; benchmarks are realistic averages, not best-case scenarios.

How an engagement actually runs.

A live engagement is structured. Not consulting hours, not “we’ll figure it out as we go”. Four phases of setup, then monthly delivery on a calendar.

WEEK 1

Discovery & data audit

We examine your existing data — CRM exports, finance sheets, ad reports, sales records. Format and condition don’t matter. We identify the highest-leverage gaps.

WEEKS 2-3

Sector calibration

We configure benchmarks, metrics, and red-flag thresholds against your industry and your prior periods. Custom-fit, not template.

WEEK 4

First diagnosis

First written diagnosis delivered. Three priorities to act on this month, with the cost of inaction quantified for each.

MONTH 2+

Monthly action plans

Each month, a written action plan. What’s broken, where the leaks are, and the prioritized playbook for next month. Asynchronous — reply by email when convenient.

Engagement tiers

Foundation

¥90k + ¥90k/mo

Single business, simple structure

Standard **RECOMMENDED**

¥130k + ¥130k/mo

Multi-channel, growing business

Extended

from ¥200k + ¥220k/mo

Multi-business-unit, group structure

Setup guarantee: if within 3 months the improvement opportunities we identify total less than what you’ve paid us in retainers, we refund the entire setup fee. The retainer is cancellable monthly — the guarantee covers identification of opportunities, not implementation.

NEXT STEP

Request a free assessment.

Visit meridian.tokyo/assessment and tell us briefly about your business. Within 48 hours you’ll receive a written initial diagnosis: typical leakage patterns in your industry, three likely problems specific to your situation, and the hardest questions you should be answering.

No commitment, no sales call. If after the diagnosis we both agree it’s a fit, we propose terms. If not, you keep the diagnosis and this sample.