

Gross Margin Reality Check

Pairs with: Gross margin is a day-one habit

Understand the real cost of delivering early customers.

Founder / team	Account / market / topic	Date
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When to use it

Use after each early customer or pilot to see whether revenue is hiding manual effort.

What this worksheet covers

Setup effort	Support effort
Founder time	Technical effort
Gross margin estimate	Scale risk

Questions to answer before you start

How much time did delivery really take? _____ _____ _____	Which effort was one-off and which repeats? _____ _____ _____
What should be automated, documented, removed, or priced higher? _____ _____ _____	Is this customer type worth repeating? _____ _____ _____

Delivery effort log

Activity	Hours	Cost rate	Cost	Repeat or one-off
Sales handover	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
Setup/onboarding	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
Data or integration work	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
Founder calls	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
Support	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
Customer success	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
Technical fixes	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
Custom reporting	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>
Admin/procurement	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>	<hr/> <hr/>

Margin reality check

Metric	Amount or answer
Revenue from customer/pilot	_____ _____
Total delivery cost	_____ _____
Estimated gross margin	_____ _____
Hidden founder time	_____ _____
Tasks to automate	_____ _____
Tasks to document	_____ _____
Scale risk rating	_____ _____
Repeat this customer type?	_____ _____

Risks, gaps, and evidence needed

Risk or gap	Why it matters	Evidence or action needed	Owner/date
_____ _____	_____ _____	_____ _____	_____ _____
_____ _____	_____ _____	_____ _____	_____ _____
_____ _____	_____ _____	_____ _____	_____ _____
_____ _____	_____ _____	_____ _____	_____ _____
_____ _____	_____ _____	_____ _____	_____ _____

Decision card

What this now tells me

Decision

Choose one.

- Continue
- Adapt
- Pause
- Exit

Next action

Owner

Date to review
