

FICTIONAL SAMPLE DELIVERABLE

Advisory Clinic - Monthly Decision Note

A concise record of the questions raised, advice given, actions agreed and follow-up expected from one monthly clinic.

PACKAGE	Advisory Clinic
PREPARED FOR	Pandan Commerce Sdn. Bhd. (fictional)
SAMPLE PERIOD	July 2026
REFERENCE	MA-SAMPLE-AC-001
CLASSIFICATION	Sample - Public

This sample is fictional. It shows the type of written advisory output a client may receive; the actual contents depend on the agreed scope, information supplied and time used.

DOCUMENT CONTROL

How to read this sample

This is a worked example, not a promise that every month will produce every page shown here. Advisory effort follows the live decisions and artefacts that need attention.

CONTROL	SAMPLE DETAIL
Document reference	MA-SAMPLE-AC-001
Prepared for	Pandan Commerce Sdn. Bhd. (fictional)
Scenario	Founder-led B2B ordering platform preparing an enterprise pilot
Package allocation	Up to 4 advisory hours per month
Working rhythm	One scheduled clinic each month
Response target	Initial response within 3 business days
Classification	Sample - Public

What the fee buys

Reserved access to senior technical judgement, preparation, review time and concise written follow-through. Meetings, research, document review, notes and between-session replies all use the monthly allocation.

Consultant provides

- Advice based on the agreed systems and information made available.
- Clear recommendations, assumptions and points requiring a client decision.
- A practical record of priorities, owners and follow-up where the work warrants it.

Client remains responsible for

- Supplying accurate context, access and relevant technical artefacts.
- Business decisions, implementation, change approval and production testing.
- Escalating material changes, incidents or deadlines that affect the advice.

MONTHLY CLINIC

What needed a decision this month

The founder supplied one architecture sketch, a short client questionnaire and three findings from the same web application. The clinic concentrated on decisions that could block the enterprise pilot.

3 questions worked through	3 findings triaged	5 actions recorded
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Consultant's overall view

Proceed with the pilot only after administrator MFA and tenant export controls are confirmed in the staging environment. The remaining items can follow the normal release cycle if their owners and dates are kept visible.

Material supplied - One-page deployment diagram - Client questionnaire sections 4 and 7 - Three findings from the June application review	Clinic boundaries - Advice and triage only - No penetration testing or production changes - No full questionnaire completion on the client's behalf
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ADVICE RECORD

Three questions, three clear positions

The note records the context considered and the position agreed in the room. Where evidence was incomplete, the advice is marked as conditional rather than dressed up as certainty.

01 / Should the pilot wait for single sign-on?

Context

The enterprise client prefers SAML, but only eight named pilot users will be onboarded.

Consultant's advice

SAML is not a release blocker for the pilot. Enforce MFA, restrict pilot accounts and record SAML as a condition before wider rollout.

Agreed action

Founder to obtain written pilot acceptance of this temporary position.

02 / Can support staff export tenant data?

Context

The current support role can generate CSV exports for any tenant after selecting an account in the admin portal.

Consultant's advice

Do not rely on staff procedure alone. Limit export permission, require a case reference and log the operator, tenant and row count.

Agreed action

Technical lead to demonstrate the revised control in staging before pilot data is loaded.

03 / How should the questionnaire be answered?

Context

The client asks whether all privileged access is protected by MFA and reviewed quarterly.

Consultant's advice

Answer 'partially implemented' until the service account exception is resolved. Describe the exception and target date plainly.

Agreed action

Founder to submit the qualified answer; consultant to review the final two paragraphs by email.

FINDING TRIAGE

One report, three findings put into delivery order

Severity labels were treated as input, not the decision. Priority reflects exposure, business timing and the practical dependency between fixes.

What was not done

The clinic did not validate the findings, retest fixes or rewrite the pentest report. Those activities need a separate scope if required.

ID	ISSUE	PRIORITY	REASON	NEXT MOVE
F-01	Cross-tenant export permission	P0	Pilot data could be exposed through an over-broad support role.	Restrict and verify before pilot
F-02	MFA optional for administrators	P0	Privileged access and questionnaire commitment are both affected.	Enforce for human admin accounts
F-03	Verbose API errors	P2	Useful to an attacker but no direct compromise shown in the report.	Reduce detail in normal sprint

ACTION NOTE

Agreed actions and owners

Short advice is only useful when somebody owns the next move. Dates below are fictional and show the level of specificity expected from the clinic note.

Escalate before next clinic if - A pilot deadline moves earlier - The export control cannot be implemented - A suspected incident or new critical finding appears	Bring to the next clinic - Closure evidence for F-01 and F-02 - The final client questionnaire response - Any decision needed for the wider rollout
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ACTION	OWNER	TARGET	EVIDENCE FOR CLOSURE	STATUS
Limit tenant export to approved support cases	Technical lead	22 Jul	Role test and audit event screenshot	OPEN
Enforce MFA for named administrators	Platform owner	22 Jul	Identity policy export	OPEN
Record the temporary SAML position	Founder	19 Jul	Client acceptance email	IN PROGRESS
Qualify questionnaire response	Founder	19 Jul	Submitted response copy	IN REVIEW
Reduce production API error detail	Backend lead	05 Aug	Response samples and test result	PLANNED

TIME AND FOLLOW-UP

How the month's allocation was used

The retainer pays for thinking time around the meeting as well as the meeting itself. This sample keeps that usage visible.

Availability and scope

Subject to consultants' availability. Extra work begins only after the scope, schedule and fee are agreed in writing. Unused monthly hours do not roll over.

End-of-month position

- The consultant will review the two agreed questionnaire paragraphs if received by 25 July.
- Implementation and production approval remain with the client.
- A new system or unrelated report would need to be scheduled separately.

ACTIVITY	TIME	OUTPUT
Pre-read and preparation	0.75 h	Questions grouped; missing evidence identified
Monthly clinic	1.00 h	Three decisions and finding priorities agreed
Written decision note	1.00 h	This sample deliverable
Email review allowance	0.50 h	Final questionnaire wording review
Remaining allocation	0.75 h	Held for agreed follow-up within July