



REVENUE LEAK AUDIT

SELF-AUDIT REPORT

PREPARED FOR

Sarah Chen

Senior Private Banker · Singapore · 12-year tenure

Find the Leak. Fix the Weakness. Rebuild the Revenue.

SPECIMEN · DEMONSTRATION OF THE SELF-AUDIT REPORT FORMAT

This is a worked example. The profile is illustrative; the methodology is canonical.

Executive Summary

CALIBRATION CONFIDENCE

MEDIUM

Two of four calibration items show drift against forward-scored questions.

Trust the strong scores below with calibrated caution.

HEADLINE NUMBERS

3.4 / 5.0

Weighted overall score

Functional band, with stage variance

\$340K – \$580K

Estimated annual revenue leakage

Across the seven HARVEST stages

MASTERY

Recommended pull-through

\$34,997 · 6-month container

WHAT THIS AUDIT SURFACED

Sarah self-rated at Score 4 across most of the forty-five HARVEST questions — a confident profile of a senior private banker operating well above functional. The calibration items tested four specific behavioural disciplines against that self-perception. Two of the four returned drift. The Audit's role is to name what the drift means and where the calibrated next steps lie.

ICP discipline (Hunt). Soft drift on C1. Sarah self-rates 4 on Q1 and Q6, but in the last 90 days has not declined a warm UHNW introduction on ICP grounds. The discipline is aspirational, not operational. Estimated leak contribution: \$60-90K.

Hidden-Influencer Mapping (Research). Hard drift on C2. Sarah self-rates 4 on Q14, but has produced one Hidden-Influencer Map in the last 30 days. Across her top-five active pursuits, four are running without structured Maps. Estimated leak contribution: \$140-220K.

Three-Meeting Rhythm (Engage). Aligned on C3. Sarah can name the commitment-architecture move on her last three deals. Score 4 self-rating is calibrated. No drift here.

Tend cadence (Tend). Soft drift on C4. Sarah has made substantive contact with three of her top-five existing clients in the last 90 days; two have not heard from her substantively in 4-6 months. Estimated leak contribution: \$140-270K, compounding into inheritance-moment exposure.

The Audit cannot eliminate aspirational answering — no self-administered instrument can. What it can do is detect drift reliably and report calibration confidence with honest specificity. The MEDIUM confidence band is itself the most useful output: it tells Sarah which scores to trust, which to interrogate, and where the next-step work begins.

Your Wrangler Read

The Side B Wrangler Read locates you in the WHALE Code v2 dual-sided architecture. Your animal classification shapes how the Audit's findings should be remediated — the goal is calibrated discipline in your natural register, not a foreign one.

YOUR CLASSIFICATION

PRIMARY LION <i>Polish, gravitas, calibrated authority.</i> Score 47/60 on the Lion items.	SECONDARY HORSE <i>Relational warmth, long-horizon loyalty.</i> Score 41/60 on the Horse items.
--	---

HUNTER / GATHERER FOUNDATION



Your Hunter / Gatherer foundation tilts moderately toward Gatherer — the relational long-horizon orientation that builds and tends rather than hunts and closes. This is the natural pairing for your Lion-Horse animal profile and consistent with your tenure pattern.

WHAT THIS MEANS FOR THE AUDIT'S FINDINGS

- Lion polish produces high self-perception on visible disciplines. Your Score 4 self-ratings on Q1, Q6, Q14 reflect the polish-confidence pattern common in senior Lion operators. The C1 and C2 calibration items are surfacing the gap between polish and operational discipline. This is structurally diagnostic, not personal.
- Horse warmth produces strong relationship depth at the top of the book. Your top-three clients almost certainly receive calibrated Tend cadence. The C4 drift is appearing at clients four and five — the Lion polish produces top-tier-only excellence that does not extend to the broader book. This is the most fixable pattern in the Audit.
- Lion-Horse together is one of the most commercially powerful pairings in UHNW practice — when calibrated. The remediation pathway is structural discipline that respects the polish and warmth rather than fighting them. Mastery is built for exactly this calibration work.

Lion-primary operators with C1 and C2 drift represent the most common MEDIUM-confidence profile in UHNW practice. The drift is fixable; the polish and warmth that produced your career are the foundation, not the obstacle.

HARVEST Stage-by-Stage Read

Your scores against the forty-five HARVEST questions and four calibration items, stage by stage. Calibration items are reverse-scored — the score column reads the calibration alignment, not the discipline level. (Page one of two.)

STAGE H · HUNT		Weight 1.4x	Stage average: 4.0
Q1	ICP Discipline		4
Q2	Pre-Approach Intelligence		4
Q3	Warm-Introduction Discipline		5
Q4	Trigger-Event Surveillance		3
Q5	Pursuit Volume Calibration		4
Q6	Decline Discipline		4
C1	<i>Calibration cross-check · SOFT DRIFT</i>		2
STAGE A · ATTRACT		Weight 1.3x	Stage average: 2.8
Q7	Digital Footprint Quality		3
Q8	Content Production Cadence		2
Q9	Thematic Identity		2
Q10	Inbound Architecture		3
Q11	Stage Visibility		3
Q12	Authority Signal Stack		4
STAGE R · RESEARCH		Weight 1.2x	Stage average: 3.6
Q13	Attack Sheet Discipline		4
Q14	Hidden-Influencer Mapping		4
Q15	Dream-Weave Pre-Identification		3
Q16	WHALE Code v2 Pre-Read		3
Q17	Anticipated Objection Map		4
Q18	Pre-Meeting Choreography		4
Q19	First-Meeting Hypothesis		3
C2	<i>Calibration cross-check · HARD DRIFT</i>		1
STAGE V · VALUE		Weight 1.1x	Stage average: 3.9
Q20	Value Articulation Without Hedging		4
Q21	Credentials Deployment		4
Q22	Pricing Conviction		4
Q23	Conviction Signal		4
Q24	Stakeholder Translation		4
Q25	Value Story Discipline		4
Q26	Value-Risk Symmetry		3

HARVEST Stage-by-Stage Read - Continued

Engage, Secure, and Tend stages. (Page two of two.)

STAGE E · ENGAGE		Weight 1.0x	Stage average: 3.9
Q27	Three-Meeting Rhythm		4
Q28	Cadence Discipline		4
Q29	Stakeholder Mapping		4
Q30	Premature-Close Avoidance		4
Q31	Multi-Channel Engagement		4
Q32	Internal-Selling Architecture		3
Q33	Commitment-Readiness Recognition		4
C3	<i>Calibration cross-check · ALIGNED</i>		4
STAGE S · SECURE		Weight 0.9x	Stage average: 3.7
Q34	Behavioural-Yes Recognition		4
Q35	Decision-Moment Objection Handling		4
Q36	Price Discipline at Close		4
Q37	Closing Ceremony		4
Q38	Post-Commitment Transition		3
Q39	Referral Architecture at Close		3
STAGE T · TEND		Weight 0.8x	Stage average: 3.3
Q40	Tend Cadence Discipline		4
Q41	Superhost Discipline		4
Q42	Relationship Deepening		4
Q43	Lifetime Value Architecture		3
Q44	Inheritance-Moment Discipline		2
Q45	Alumni Referral Generation		3
C4	<i>Calibration cross-check · SOFT DRIFT</i>		2
WEIGHTED OVERALL SCORE (Calibration-adjusted)			3.4 / 5.0

Calibration Analysis

The four calibration items test self-perception against behavioural evidence inside specific recent windows. Drift between the forward-scored question and the calibration item is the structural signal of aspirational answering.

C1 · HUNT

SOFT DRIFT

Cross-checks: Q1 (ICP Discipline) and Q6 (Decline Discipline)

FORWARD	CALIBRATION	GAP	ESTIMATED LEAK
4 / 4	2	-2	\$60K – \$90K annually

Sarah self-rated 4 on Q1 and Q6. The C1 item asked whether she had actively declined a warm UHNW introduction on ICP grounds in the last 90 days. She has not. This is the universal entry-level drift pattern — ICP is articulated, not yet operational. The remediation is calendared decline review and explicit ICP enforcement at the introduction-vetting moment.

C2 · RESEARCH

HARD DRIFT

Cross-checks: Q14 (Hidden-Influencer Mapping) and Q13 (Attack Sheet Discipline)

FORWARD	CALIBRATION	GAP	ESTIMATED LEAK
4 / 4	1	-3	\$140K – \$220K annually

This is the most consequential drift in your profile. Sarah self-rated 4 on Q14 — the Hidden-Influencer Map discipline. The C2 item asked about three completed Maps in the last 30 days before first meetings. She produced one. Across her top-five active pursuits, four are running without structured Maps. Hidden-Influencer drift compounds forward through every downstream stage — Engage and Secure inherit the gaps. This is where the largest leak in your practice currently sits.

C3 · ENGAGE

ALIGNED

Cross-checks: Q27 (Three-Meeting Rhythm) and Q33 (Commitment-Readiness)

FORWARD	CALIBRATION	GAP	ESTIMATED LEAK
4 / 4	4	0	Not contributing to leak — net positive

Sarah's self-rating on the Three-Meeting Rhythm is calibrated. She can name the specific commitment-architecture move on each of her last three deals. This is the anchor of her current commercial performance — the engagement choreography is the discipline she has actually built operationally. No drift here. This is the strength to build the remediation around.

C4 · TEND

SOFT DRIFT

Cross-checks: Q40 (Tend Cadence) and Q41 (Superhost Discipline)

FORWARD	CALIBRATION	GAP	ESTIMATED LEAK
4 / 4	2	-2	\$140K – \$270K annually · compounding

Sarah self-rated 4 on Q40 and Q41. The C4 item asked about substantive (non-transactional) contact with each of her top-five existing clients in the last 90 days. Three of five — yes. Two of five — no, with one client at six months since substantive contact. The Lion pattern: top-tier-only excellence. The compounding cost over years is inheritance-moment exposure.

Top Three Remediation Priorities

The Audit's role ends with diagnosis. Remediation requires structured work — the kind of work the Self-Audit cannot deliver but the higher-tier Vault programmes are designed for. These are the three highest-leverage priorities the calibrated read surfaces.

01

Hidden-Influencer Mapping

Research · C2 Hard Drift

Estimated leak: \$140K – \$220K annually

WHAT

Build the operational discipline of producing structured Hidden-Influencer Maps before every first substantive meeting. Currently you produce one Map per month against a Score 5 standard of three or more. Across your top-five active pursuits, four are running blind to the structural decision-shapers.

REMEDIATION PATHWAY

Calendared pre-meeting Map work. The discipline is templated; the practice is building the template against your actual pipeline and pressure-testing it against twenty-five years of UHNW pattern data. Mastery includes 1:1 work on your specific Map architecture; Atelier Day Two is the in-person Map masterclass.

Now: Score 1 (calibration evidence) — Critical. The Map discipline is not operational; it is aspirational.

Target: Score 5 — Hidden-Influencer Mapping is universal pre-meeting discipline across active pursuits.

02

Tend Cadence Discipline

Tend · C4 Soft Drift

Estimated leak: \$140K – \$270K annually · compounding

WHAT

Extend the calibrated Tend cadence from your top-three clients to your full top-five — and then beyond. The Lion top-tier-only pattern is the structural cost of polish without universal application. The compounding cost across years is inheritance-moment exposure when generational transitions arrive.

REMEDIATION PATHWAY

Documented client-context system maintained systematically rather than mentally. Calendared Tend rhythm calibrated by client preference, not by attention-budget default. Mastery 1:1 work develops the system against your specific book; Sanctum integrates it across the operation if scaling to multi-stakeholder Tend.

Now: Score 2 (calibration evidence) — Cadence calibrated for top-three clients only. Soft drift on top-four and top-five.

Target: Score 5 — Universal Tend cadence across the broader book; Superhost discipline operational at every relationship.

03

ICP Decline Discipline

Hunt · C1 Soft Drift

Estimated leak: \$60K – \$90K annually

WHAT

Operationalise the ICP discipline by exercising the decline. An ICP that is never used to decline is not operationally a constraint. The 90-day window without an ICP-grounded decline tells the introducer network that the stated ICP is aspirational rather than real, which weakens future introduction quality.

REMEDIATION PATHWAY

Quarterly decline review surfaces the past 90 days' pursuits with explicit identification of ones that should have been declined. Calibrated decline language that respects the introducer and protects the relationship. Mastery 1:1 work refines the decline architecture; Accelerator Session 1 includes hot-seat decline practice.

Now: Score 2 (calibration evidence) — Decline rare; ICP not operationally enforced.

Target: Score 5 — Decline operational and visible; 15-30% of presented pursuits declined; introducer network knows the discipline is real.

What Comes Next

The Self-Audit has surfaced what it can surface. Forty-five HARVEST diagnostic questions and four calibration items have produced a calibrated read of where your practice is operating, where it is leaking, and where the highest-leverage remediation lies. This is the floor of what the Audit can deliver self-administered.

The next layer of work — the layer that converts diagnosis into operational change — requires structured remediation against your specific commercial reality. The instrument is the same; the depth of read and the discipline of remediation work are different.

RECOMMENDED NEXT STEP

THE MASTERY

\$34,997 · Six-month container · Application-based

WHY MASTERY FITS YOUR CALIBRATED PROFILE

Mastery is the tier built for senior practitioners with C1, C2, and C4 drift patterns and aligned C3 — the calibration profile that says: the engagement discipline is real, the surrounding disciplines are aspirational, the polish is doing the work the operational system should be doing. Mastery's 1:1 architecture surfaces the specific drift patterns against your specific book of business and remediates them through structured discipline that respects your Lion-Horse register rather than fighting it.

WHAT MASTERY INCLUDES

- Personal 1:1 work on your specific calibration drift patterns
- WHALE Code Practitioner certification (full Side A + Side B)
- Vault Alumni Network access — quarterly Singapore convenings
- Six-month container with structured 90-day remediation cycles
- Hidden-Influencer Map architecture against your top-ten pursuits
- Tend cadence system extending from top-three to full book

The Self-Audit is built to be honest about what it surfaces and what it does not. What it surfaces: the calibrated read above. What it does not: the structured remediation work that converts diagnosis into changed practice. That work is yours to take if and when you choose. The Audit produces the floor; the next step is the operator's decision.

OTHER PATHWAYS

Assisted Audit \$1,997

60-minute Zoom debrief with a Vault facilitator. The full anchors and the calibrated read of your scores. The next step if you want clarity on the Audit before committing to remediation.

Accelerator \$11,997

Eight-session group cohort over six weeks. Hot-seat work on your live pipeline. The next step if peer pressure-testing fits your remediation register better than 1:1 depth.

Atelier \$39,997 – \$44,997

Four-day in-person Singapore intensive after Mastery. The Cultural Atlas, the Roleplay Heat, the medallion. The compounding tier above Mastery for the operator going to scale.

Closing

Sarah, this report is your map of the leaks. The calibration discipline behind it is the structural commitment Vault makes to every Audit deliverable: we tell the operator the truth, we tell it kindly, and we tell it with calibrated specificity rather than generic flattery. The MEDIUM Calibration Confidence band on the cover is not a critique — it is the most useful diagnostic the Audit produces. It tells you which of your scores to trust, which to interrogate, and where the remediation work begins.

The drift patterns surfaced here are common — they are the universal entry-level patterns in senior UHNW practice. They are not personal; they are structural. The polish and warmth that produced your career are the foundation of the remediation, not the obstacle. Mastery, if you choose it, builds the operational discipline that converts your existing Lion-Horse register into compounding outcomes across the next decade of your practice.

Thank you for taking the Audit. Whatever you choose next, the work it surfaces is yours.

Marcus Lim

*Founder & Chief Executive, Vault Corporation
Singapore, May 2026*

Find the Leak. Fix the Weakness. Rebuild the Revenue.

VAULT CORPORATION

Singapore · vault-corporation.com · marcus-lim.com