THE GAP REPORT

ONE PAGE. YOUR BIGGEST PROBLEM, CLEARLY STATED.

This template surfaces the most significant current gap between what your business delivers and what your customer expected to receive. Complete it for one specific gap — not all gaps at once. Pick the one that is costing you the most right now and be precise. Vague answers here produce vague strategy.

01 — WHAT WE CURRENTLY OFFER

Describe what your business provides — what you sell, deliver, or do. Write it plainly, the way you would explain it to a stranger in two minutes. Not aspirationally — describe what is actually delivered.

02 — WHAT OUR CUSTOMER EXPECTS

Describe what a first-time customer expects to receive — based on your marketing, your category reputation, what you say in sales conversations, and what your competitors promise. Write what they actually expect, not what is reasonable for them to expect.

03 — WHERE THESE EXPECTATIONS WERE FORMED

Understanding how the expectation was created tells you where the fix needs to happen. Check all that apply.

- ☐ Our advertising or marketing materials
- ☐ What we say in sales conversations
- ☐ Industry norms (what the category usually delivers)
- ☐ Prior experience with a similar product or service
- ☐ Our website content and copy
- ☐ Competitor promises and positioning
- ☐ Word of mouth or referral from existing clients
- ☐ Other: _____

Notes on how the expectation was formed:

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04 — THE SPECIFIC GAPS

List each point where what you deliver diverges from what the customer expected. Be precise — "they expected faster delivery" is more useful than "they expected better service."

The gap — what specifically differs?	How often does this occur?	Impact 1–5

05 — IMPACT OF THIS GAP

Rate the impact across five dimensions. 1 = minimal impact. 5 = severe, measurable impact.

Revenue — Are you losing sales, or charging less than you should, because of this gap?

○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ____ / 5

Retention — Are customers not coming back because their expectations were not fully met?

○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ____ / 5

Referral — Are satisfied customers choosing not to refer others because the experience was not remarkable?

○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ____ / 5

Reputation — Is this gap shaping how the market talks about or perceives your business?

○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ____ / 5

Operations — Is this gap creating internal friction — complaints, rework, or team morale issues?

○ 1 ○ 2 ○ 3 ○ 4 ○ 5 ____ / 5

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06 — WHY DOES THIS GAP EXIST?

Root cause. Check all that apply, then explain below.

- [ ] Our marketing over-promises what we deliver
- [ ] We have not defined what is and is not included
- [ ] We are attracting the wrong customer profile
- [ ] Other: _____
- [ ] The industry sets expectations we do not meet
- [ ] Our delivery process has communication gaps
- [ ] The expectation is reasonable but we have deprioritized fixing it

Explain the root cause more specifically:

07 — THE SINGLE HIGHEST-LEVERAGE FIX

If you could change one thing that would most close this gap — what would it be? Not a list. One specific, nameable thing.

08 — WHAT THAT CHANGE REQUIRES

Check all that apply to the fix you identified above.

- [ ] A change to our messaging and how we describe what we do
- [ ] A change to our delivery or fulfillment process
- [ ] A change to who we accept as clients or customers
- [ ] A change to the offer itself — what is included or excluded
- [ ] A change to how we set expectations before the sale
- [ ] A change to how we communicate during an engagement

Other requirements:

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09 — ACTION PLAN

First action step — what specifically will you do? Be precise enough that someone else could verify whether it was completed.

Deadline:

Owner:

How will you know the fix is working? Name a specific metric and target value — something measurable, not a feeling.

NOTES

If completing this surfaced more than one gap — that is normal. Prioritize by impact and start with the highest-leverage one.

The full Port Delta engagement maps every gap across your entire business systematically.

Start a conversation at portdelta.com