

STRATEGIC DISCOVERY ADVISORY™

Sample Report

Indicative structure of every Transera Strategic Discovery Advisory engagement

Every Strategic Discovery Advisory engagement produces a written Advisory Summary Report tailored to the client's industry vertical, site landscape, capital scale, and program scope. This document indicates the structure and depth of every report — the actual content is bespoke.

Engagement	Strategic Discovery Advisory™
Duration	2 hours of live engagement (2 x 60-min)
Format	Microsoft Teams · 1 Discovery Call + 1 Strategy Call
Deliverable	Written Advisory Summary Report (PDF)
Submission	Within 7 business days of receiving all required information

Delivery commitment: The written Advisory Summary Report is submitted within **7 business days of receiving all required information** from the client. To meet this timeline, please review the prep checklist on Page 2 and share materials at least 48 hours before the Discovery Call.

Sample Report Index

Eight standard sections delivered in every Strategic Discovery Advisory engagement.

1. Executive Summary	One-page synthesis of program context, key findings, top-three risks, and recommended next steps.
2. Program Context & Objectives	Documented understanding of the client's electrification program, business drivers, capital envelope, timeline, and stakeholder landscape.
3. Infrastructure Readiness Assessment	Structured evaluation across 8 readiness dimensions: site, electrical capacity, regulatory, vendor, financial, operational, organizational, reporting.
4. Risks, Constraints & Dependencies	Risks ranked by likelihood and impact, key constraints (utility, AHJ, permitting), and critical workstream dependencies.
5. Recommended Next Steps	Structured roadmap across pre-engineering, governance, procurement, stakeholder alignment, and capital phasing — aligned to the Transera 8P Framework™.
6. Engagement Path Forward	Options for continuing engagement with Transera or proceeding independently with documented handoff materials.
7. Appendices	Reference materials including site context summary, stakeholder map, capital phasing diagram, and supplementary research.
8. Engagement Terms & Policy	Reference to Transera's Cancellation, Refund & Rescheduling Policy and engagement letter terms.

Required Information from Client

To deliver the Advisory Summary Report within 7 business days, please share the following at least **48 hours before the Discovery Call**. Partial information is more useful than complete information arriving late.

1. Program summary: state, objectives, drivers	5. Capital & timeline: budget ranges, milestones
2. Site list: locations, count, studies completed	6. Stakeholders: decision-makers and influencers
3. Fleet inventory: count, type, duty cycle	7. Sustainability obligations: ESG, disclosure, compliance
4. Utility & regulatory: correspondence, ECRA/ESA, AHJ	8. Existing engagements: incumbents, OEMs, partners

This sample document indicates structure only. Actual reports are confidential, tailored to each engagement, and contain client-specific findings, recommendations, and risk analysis. Strategic Discovery Advisory™ is a service mark of Transera Group Ltd.