Coverage Report

Lakeshore Cold Systems, Inc. · results against Critical Procedure List v1.0

Business	**Lakeshore Cold Systems, Inc.**	Report date	**Jun 12, 2026**
Owner	**Gary Lindqvist**	Capture window	**Apr 6 – Jun 12, 2026**
Coordinating advisor	**Karen Brandt, Brandt Exit Advisory**	Measured against	**Critical Procedure List v1.0 + 2 logged changes**

RESULT

27 / 36 critical procedures are written down and confirmed accurate by the person who knows them. 9 of those have also been performed by a second person using only the procedure. 3 more are captured and waiting on review. 6 are not captured yet — 3 of them because they only happen at another time of year.

9
Proven — a second person did it from the procedure

18
Validated — source confirmed it's accurate

3
Captured — recorded, review pending

6
Not captured — still in one head

BY TIER

TIER	ON LIST	PROVEN	VALID.	CAPT.	NOT	DONE
P1	13	6	4	1	2	**10 of 13**
P2	18	3	10	2	3	**13 of 18**
P3	5	0	4	0	1	**4 of 5**
All	**36**	**9**	**18**	**3**	**6**	**27 of 36**

ONE-PERSON PROCEDURES, BY HOLDER

HELD BY	AT START	STILL UNDOC.	CAPTURED	VALIDATED	PROVEN
Gary Lindqvist · Owner	**9**	**4**	1	3	1
Tom Haugen · Senior technician	**4**	**1**	0	3	0
Deb Kowalski · Office manager	**3**	**0**	1	2	0
Ana Ruiz · Lead technician	**1**	**0**	0	0	1
All	**17**	**5**	**2**	**8**	**2**

A validated procedure means the knowledge is no longer only in that person's head. Only a proven one shows someone else can actually do the work.

What this report says

- Which procedures exist in a usable form, who confirmed them, and when.
- Which have been carried out by a second person using only the procedure.
- What still depends on one person, by name, and when it can be captured.

What it doesn't say

- What the business is worth, or how a buyer or appraiser will treat owner dependence.
- That the business is compliant with any regulation. LCS-17 and LCS-19 describe how the work is done, not whether it meets the rule.
- That relationships have transferred. Account knowledge supports a handover; it isn't one.

CHANGES TO THE LIST

DATE	CHANGE	REASON	AGREED BY
Apr 17	Removed LCS-25 Fleet GPS & telematics setup (P3)	Vendor-managed; vendor documentation is adequate	G. Lindqvist · K. Brandt
Apr 24	Added LCS-37 Manufacturer warranty claims (P2)	Surfaced while capturing parts ordering; only Deb files them	G. Lindqvist · K. Brandt

Net list size unchanged at 36. No other changes.

PROCEDURE BY PROCEDURE

REF	PROCEDURE	TIER	STATUS	VALIDATED BY · DATE	SECOND PERFORMER
FIELD SERVICE & REPAIR					
LCS-01	Walk-in cooler "no-cool" diagnosis	P1	Proven	Tom Haugen · Apr 21	Marco Silva
LCS-02	Reach-in & prep-table compressor replacement	P1	Proven	Ana Ruiz · Apr 22	Marco Silva
LCS-03	Evaporator defrost-cycle troubleshooting	P2	Validated	Tom Haugen · Apr 29	—
LCS-04	Ice machine descale, sanitize & PM	P2	Proven	Ana Ruiz · Apr 20	Jess Lin
LCS-05	Refrigerant leak search & repair	P1	Validated	Ana Ruiz · May 1	—
LCS-06	Controller & thermostat programming (3 brands)	P2	Proven	Ana Ruiz · Apr 30	Marco Silva
LCS-07	After-hours emergency triage by phone	P1	Proven	Tom Haugen · Apr 16	Luis Ortega
LCS-08	PM visit checklist — grocery accounts	P2	Proven	Tom Haugen · Apr 17	Jess Lin
INSTALL & REPLACEMENT					
LCS-09	Walk-in box assembly & panel sealing	P2	Validated	Tom Haugen · May 8	—
LCS-10	Condensing unit set & line-set brazing	P1	Validated	Tom Haugen · May 7	—
LCS-11	Rack system startup & commissioning	P1	Not captured	—	—
LCS-12	Equipment sizing for new installs	P2	Validated	Gary Lindqvist · May 13	—
SEASONAL & ONCE-A-YEAR WORK					
LCS-13	Spring condenser-cleaning program — route build & scheduling	P2	Validated	Deb Kowalski · Apr 24	—
LCS-14	Rooftop unit spring startup & fall shutdown	P2	Validated	Tom Haugen · Apr 23	—
LCS-15	Summer ice-machine surge staffing plan	P3	Validated	Gary Lindqvist · May 22	—
LCS-16	Year-end parts & refrigerant inventory count	P2	Not captured	—	—
LCS-17	Annual refrigerant compliance records	P1	Not captured	—	—
LCS-18	Insurance renewal & customer certificates	P3	Validated	Deb Kowalski · Jun 3	—
SAFETY & COMPLIANCE					
LCS-19	Refrigerant recovery, cylinder handling & logs	P1	Proven	Ana Ruiz · Apr 28	Marco Silva
LCS-20	Roof access & fall protection	P1	Validated	Tom Haugen · Apr 10	—
LCS-21	Hot-work permits at customer sites	P2	Validated	Ana Ruiz · Apr 30	—
LCS-22	Customer product-loss response (temperature excursion)	P1	Captured	Captured · awaiting Tom Haugen	—
OFFICE, DISPATCH & BILLING					
LCS-23	Dispatch priority rules — who gets a truck first	P1	Proven	Luis Ortega · Apr 14	Deb Kowalski
LCS-24	Service-agreement billing & renewals	P2	Validated	Deb Kowalski · Apr 22	—
LCS-25	~~Fleet GPS & telematics setup~~	P3	Removed	Removed Apr 17 — see change log	
LCS-26	Parts ordering & supplier substitutions	P2	Validated	Luis Ortega · Apr 21	—
LCS-27	Job costing & invoice review	P2	Validated	Deb Kowalski · May 6	—
LCS-28	New-technician onboarding & ride-along sequence	P3	Validated	Tom Haugen · May 14	—
LCS-37	Manufacturer warranty claims (added)	P2	Captured	Captured · awaiting Deb Kowalski	—
MANAGEMENT, PRICING & ACCOUNTS					
LCS-29	Repair-vs-replace quoting	P1	Proven	Gary Lindqvist · Apr 20	Ana Ruiz
LCS-30	Pricing national-account work orders	P2	Captured	Captured · awaiting Gary Lindqvist	—
LCS-31	Key account protocol — Bluewater Foods (6 stores)	P1	Validated	Gary Lindqvist · May 5	—
LCS-32	Equipment distributor terms & credit escalation	P2	Not captured	—	—
LCS-33	School-district & municipal kitchen bids	P2	Not captured	—	—

REF	PROCEDURE	TIER	STATUS	VALIDATED BY · DATE	SECOND PERFORMER
LCS-34	Technician hiring screen	P3	Not captured	—	—
LCS-35	Collections escalation for slow-pay accounts	P3	Validated	Gary Lindqvist · May 15	—
LCS-36	Weekly cash & backlog review	P2	Validated	Gary Lindqvist · May 12	—

STILL OPEN

REF	PROCEDURE	TIER	HELD BY	WHY IT'S OPEN	NEXT CHANCE	PLAN
LCS-11	Rack system startup & commissioning	P1	Tom Haugen	Bluewater store 4 project moved from May 18 to Aug 3	Aug 3	Capture on site during startup; Marco assists
LCS-16	Year-end parts & refrigerant inventory count	P2	Deb Kowalski, Gary Lindqvist	Only happens in December	Dec 28	Capture the count as it runs; 2025 count sheets filed as interim reference
LCS-17	Annual refrigerant compliance records	P1	Gary Lindqvist	Prepared each January	Jan 2027	Recorded walkthrough of the 2025 file Jun 24; full capture during January prep
LCS-32	Equipment distributor terms & credit escalation	P2	Gary Lindqvist	Terms under renegotiation; Gary asked to wait	Jul	Capture after new terms are signed
LCS-33	School-district & municipal kitchen bids	P2	Gary Lindqvist	Bid cycle runs Feb–Mar, before the window opened	Feb 2027	Annotated copy of the 2026 bid package now; capture the 2027 cycle
LCS-34	Technician hiring screen	P3	Gary Lindqvist	No technician hire during the window	Next hire	Capture at next hire; Tom sits in
LCS-22	Customer product-loss response (temperature excursion)	P1	Tom Haugen	Captured; waiting on review by the source	Jun 26	Review session booked
LCS-30	Pricing national-account work orders	P2	Gary Lindqvist	Captured; waiting on review by the source	Jun 26	Review session booked
LCS-37	Manufacturer warranty claims	P2	Deb Kowalski	Captured; waiting on review by the source	Jun 26	Review session booked

WHERE IT LIVES

Every procedure is in Lakeshore's own QuicklyDoc library, owned by the business, with the source recording, revision history and validation record attached to each one. The owner can grant read access to an advisor or, later, a buyer's diligence team, and can export everything. This report can be re-run at any time against the same list.

QuicklyDoc — J. Park
Prepared Jun 12, 2026

Owner — Gary Lindqvist
Reviewed / date _____

Advisor — Karen Brandt
Copy received / date _____

Illustrative sample with fictional data. Lakeshore Cold Systems, Bluewater Foods, Brandt Exit Advisory and all people, dates and figures are invented for demonstration. Prepared by QuicklyDoc for the business named above, which owns this document and the procedure library it describes.