

How the Operational Flow Audit works

Before we recommend anything, we learn how work really moves through your business, shortcuts and workarounds included. Then we price the fixes and rank them by payback, so you know what to do first.

You contract by workflow. A workflow is one process, start to finish, such as scheduling, callbacks or order entry. Start with one and add more whenever it makes sense. If one turns out to be two processes, we'll tell you before starting the second.

1

Listen

Interviews with leaders and the people who do the work

2

Measure

Your own records: call logs, schedules, orders

3

Compare

Providers demoed on your workflow, or a custom build

4

Roadmap

Now, next and future fixes, with payback

INCLUDED IN EACH WORKFLOW

- Leadership interviews on your goals, key processes and team roles.
- Frontline interviews on the real workday: shortcuts, workarounds and repeated steps.
- Analysis of your own records, such as call logs and orders.
- An opportunity map of recurring bottlenecks, mistakes that cost time or trust, and effort out of proportion to its payoff.

- Fixes designed around your team's concerns.
- Provider research and live demos, with a recommendation to buy or build.
- A roadmap in three stages, now, next and future, with the cost and payback of each fix.
- Detailed flow maps for the top two or three opportunities.
- A report-out meeting and a round of follow-up questions.

NOT INCLUDED

- Software and subscription costs.
- Custom builds and setup, quoted after the roadmap.

AFTER THE AUDIT

We deliver a roadmap you can execute on your own. Clients often ask us to help put it in place, such as building custom tools, setting up phones and software, or managing the recommended vendors. We're happy to quote that work as a separate contract.

Ready to find what's costing you?

Contact us now