GROWTH SUITE
CONSULTING

SCOPED PROJECT

Process & Automation

Take the one workflow that eats your week and fix it end to end.

Every business has a process that runs on one person's memory, sticky notes, and a lot of copying and pasting. This project picks that workflow, maps how it really works, redesigns it, and automates the parts that should never have been manual. Then your team gets trained on it.

Signs you need this

- One process falls apart when a particular person is out.
- The same information gets typed into two or three systems.
- Clients slip through the cracks between steps, like a missed follow-up or a reminder that never went out.
- Training a new hire on it takes weeks because nothing is written down.

How it works

WEEK 1	Discovery. We map the workflow as it actually runs, not as it looks on paper.
WEEK 2	Redesign. You approve the new process, the handoffs, and who owns each step.
WEEKS 3–5	Build and test the automations in the tools you already use.
WEEK 6	Team training, written procedures, and handoff.

Most projects run four to six weeks, depending on the workflow.

INVESTMENT

From $4,500 per workflow

The final fixed price is set after a 20-minute scoping call, before any work begins. Half at kickoff, half at handoff.

What you walk away with

- **A current-state map** of the workflow, including the workarounds.
- **A redesigned process** with clear handoffs and an owner for every step.
- **Working automations** built in your existing tools where they pay off.
- **Written procedures** your team can follow without calling you.
- **A training session** for everyone who touches the workflow.
- **A before-and-after time estimate** so you can see what you got back.

Good to know

Good first workflows: client intake and onboarding, quotes and invoicing, scheduling, document preparation, and employee onboarding. If there's more than one, we start with the one that costs you the most time.

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