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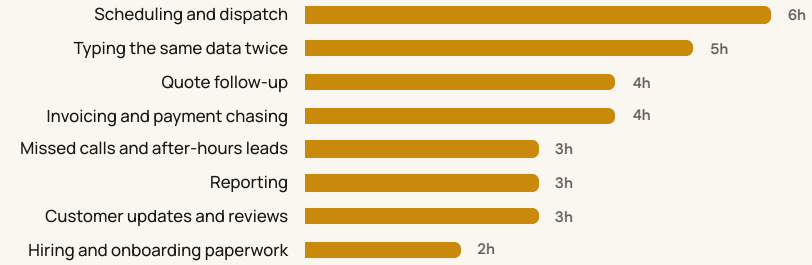
DIGITAL TRANSFORMATION · A ONE-PAGE GUIDE

The 8 processes quietly costing your business *thousands* a month

Most growing companies have a few processes that eat more staff time than they should. Here's how to spot them, and what they add up to.

EXAMPLE · 25-PERSON SERVICE COMPANY

Hours lost per week, by process



Illustrative example, not client data.

HOURS A WEEK

30

across the eight processes in the example

WHAT THAT COSTS

$3,900/mo

$46,800 a year at $30 an hour

EXAMPLE · ONE OFFICE COORDINATOR'S 40-HOUR WEEK

29 of 40 hours are repetitive work a system could do



Could be automated · Needs a person

How to spot each one, and what *fixing it* looks like

01

Scheduling and dispatch

HOW YOU'D KNOW

Mornings go to phone tag and rebooking, and jobs get typed into two systems.

THE FIX

Online booking, automatic confirmations and reminders, one calendar that feeds dispatch.

02

Typing the same data twice

HOW YOU'D KNOW

One customer gets entered into the CRM, the accounting system and a spreadsheet.

THE FIX

Connected systems: data is entered once and flows everywhere it is needed.

03

Quote follow-up

HOW YOU'D KNOW

Estimates go out and nobody chases them. A yes depends on the customer remembering.

THE FIX

Automatic follow-ups on every open quote until it is accepted or declined.

04

Invoicing and payment chasing

HOW YOU'D KNOW

Invoices are typed up after the job, and overdue reminders go out when someone gets to them.

THE FIX

The invoice goes out when the job closes, with a payment link and automatic reminders.

05

Missed calls and after-hours leads

HOW YOU'D KNOW

Calls go to voicemail, web forms wait until morning, and some never get a callback.

THE FIX

An instant text-back on missed calls, and every inquiry routed to someone until it is answered.

06

Reporting

HOW YOU'D KNOW

Someone spends Monday morning pulling numbers into a spreadsheet for the weekly meeting.

THE FIX

A dashboard that updates itself.

07

Customer updates and reviews

HOW YOU'D KNOW

Customers call to ask when the tech is coming. Review requests go out when someone remembers.

THE FIX

Automatic status texts, and a review request after every completed job.

08

Hiring and onboarding paperwork

HOW YOU'D KNOW

Managers screen every application by hand and chase new hires for forms.

THE FIX

Automatic first-pass screening and an onboarding checklist that runs itself.

THE QUICK MATH

Hours lost a week × hourly cost × 52

Two office staff each losing 5 hours a week at $30 an hour comes to **$15,600 a year**, from one process. Most businesses have three or four of these.

01

15-minute call

We go through which of these apply to you.

02

Rough numbers

What they cost you now, in hours and dollars.

03

You decide

If something's worth fixing, we scope it. If not, you've lost 15 minutes.

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