

PROCESS MODERNIZATION MAP

Identify the Outdated Processes Costing You Time, Money, and Momentum



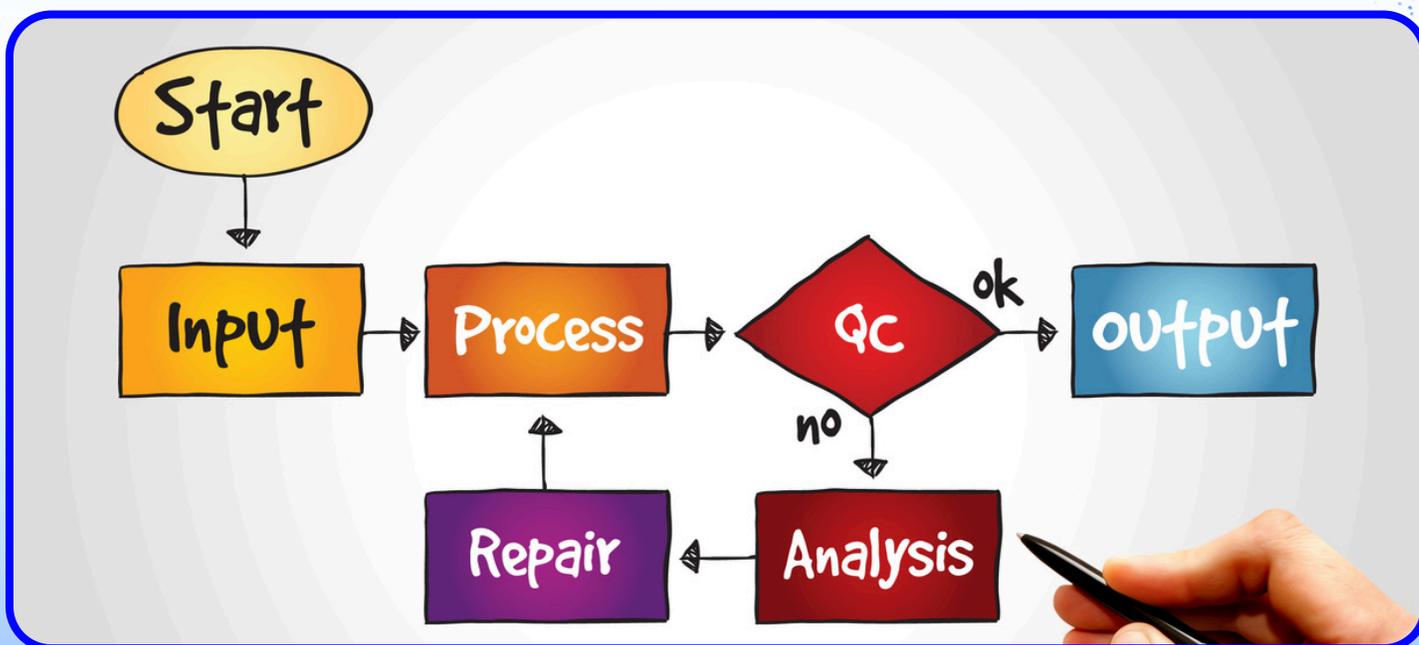
1. PROCESS INVENTORY

List your top recurring workflows:

- Lead intake _____
- Scheduling _____
- Job execution _____
- Client communication _____
- Billing & follow-up _____

For each, note:

- Who touches it _____
- How many steps _____
- Where delays occur _____



3. MODERNIZATION DECISION GRID

For each high-friction process:

- What can be eliminated? _____
- What can be standardized? _____
- What can be automated? _____
- What needs clearer ownership? _____

Rule:

Automate repetition.

Document judgment.

Assign accountability.



4. SAFE MODERNIZATION PLAN

Choose ONE process to modernize this quarter:

- Define the “current state”
- Design the “future state”
- Test with one role or team
- Adjust, then expand



CONCLUSION

You don't need to overhaul everything.

You need to modernize intentionally — starting with what hurts most

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