

## 01 / THE OPERATIONAL PROBLEM

# When One Part of the Business Needs a Better Way to Operate

**A focused engagement with a professional service business**

Lead handling, client onboarding, and service handoff crossed multiple stages, documents, people, and decisions.

I helped connect this critical part of the business: clarifying ownership and handoffs, simplifying onboarding, and creating the rhythm to move the work forward.

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**A defined scope. A connected way of working.**

I designed and refined the structure with the team, consolidated their drafts, coordinated implementation, and facilitated practice and weekly reviews.

## WHERE EXECUTION NEEDED STRUCTURE

### 01 Overlapping materials

Parallel drafts repeated questions and split the onboarding process.

### 02 Unclear handoffs

Each transition needed an owner, a trigger, and a clear next step.

### 03 Coordination bottlenecks

Pending reviews and approvals could slow the next action.

### 04 Unnecessary steps

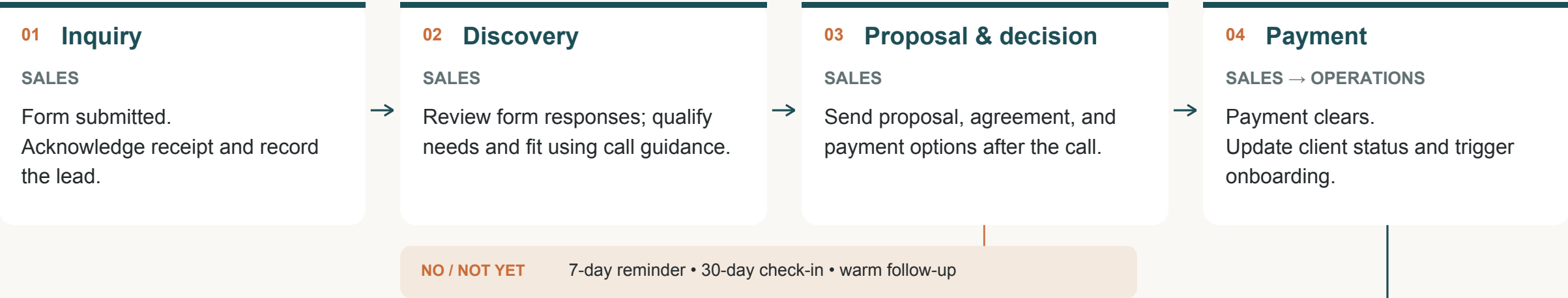
Duplicate intake and excess oversight complicated the VA handoff.

02 / THE OPERATING DESIGN

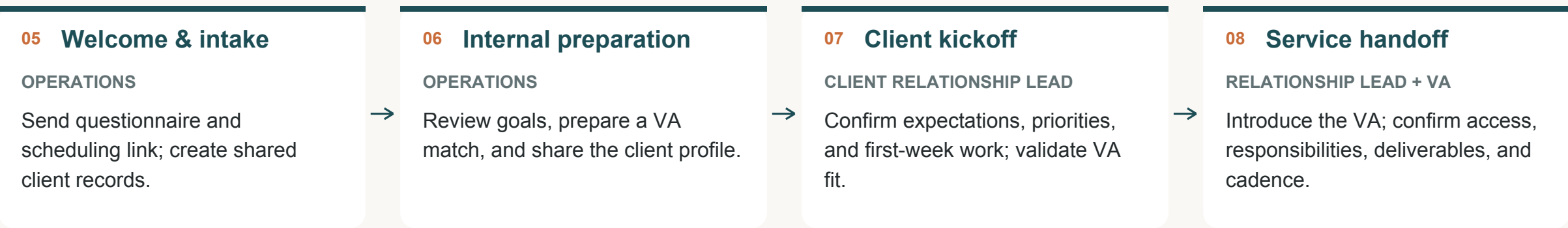
# Connect the journey from lead to delivery.

A reconstruction of the documented journeys. Role labels replace individual names.

LEAD JOURNEY



CLIENT JOURNEY / PAYMENT RECEIVED



DELIVERY & FOLLOW-UP    First-week guidance + check-in • Relationship lead: 30 / 60 / 90-day reviews

The goal wasn't to add more administration. It was to make the client journey easier for the team to execute consistently.

## 03 / FROM DESIGN TO EXECUTION

# Give the team enough structure to execute it.

I coordinated implementation and facilitated adoption with the team. Team members created some initial drafts and handled portions of the technical setup.

## THE SUPPORTING OPERATING SYSTEM

**01 Priorities into assigned work**

90 Day Target Tracker / Month 1 tasks: owners, status, and recurring check-ins.

**03 Roles & communication**

Functional ownership, response expectations, and urgent escalation paths.

**05 Weekly execution rhythm**

Progress → blockers → decisions → assignments, with shared meeting notes.

**02 Simpler intake & onboarding**

Consolidated questions and separated client kickoff from VA introduction.

**04 Scripts & call guidance**

Lead and client email sequences, discovery prompts, and onboarding agendas.

**06 Practice & first-week support**

Mock calls and a revised VA guide covering access, tasks, and a week-one check-in.

## DOCUMENTED CHANGE

- Overlapping drafts consolidated into a more streamlined process.
- Several journey, intake, welcome, and call materials completed or approved.
- Duplicate intake steps and unnecessary oversight removed.
- Ongoing responsibilities handed back to the team.

Operational consulting doesn't always mean rebuilding the entire company. Sometimes the highest-leverage work is fixing one critical part of the business that needs a better way to operate.