Map Your Business Process Before You Automate It

BUSINESS SYSTEMS & OPERATIONAL EFFICIENCY • Issue 2 learning theme: Process Before Technology

Illustrative figures are not actual client results.

The business problem

A contractor sends quotes promptly but loses work because no one owns follow-up after the estimate is sent.

What business owners need to understand

The problem is not automatically a missing AI tool. Map the entire journey from customer inquiry to completed work and payment. Find duplicated entry, unclear ownership and waiting time.

How to apply it

1. Write the trigger and the desired outcome.
2. List each step, responsible person, software system, decision and exception.
3. Measure the current time and error rate for a representative sample.
4. Remove unnecessary steps and clarify ownership before testing automation.

Work through the numbers

Suppose 80 estimates are sent monthly and 20% become jobs. Improving the close rate to 25% produces four additional jobs. At $800 per job and $500 variable cost, incremental contribution is $1,200. If follow-up software and extra effort cost $250/month, potential EBITDA improvement is $950, assuming all four jobs are delivered and costs are recognized as modeled.

Incremental EBITDA = additional completed jobs × contribution per job − additional operating expenses.

What the financial statements reveal

Income statement: check recognized sales, direct costs, operating expenses and EBITDA. Balance sheet: check cash, receivables, payables and obligations created by the decision. Cash flow: verify when money actually arrives or leaves. A positive EBITDA change does not guarantee positive cash flow.

The CEO decision

Are the four jobs truly incremental? Can the crew deliver them? Are receivables collected? Are follow-up results consistent across several weeks?

Apply it to your business

Draw your estimate-to-payment process. Circle three delays. Fix one ownership problem without purchasing software.

Your quick review

☐ What is the baseline measure?

☐ What will change and who owns it?

☐ What is the monthly cost?

☐ What is the expected EBITDA effect?

☐ What happens to cash, customer experience and risk?

Continue learning

Explore The Scaling Edge and the Across the Table Business Learning Center for more practical lessons on strategy, financial decisions, AI and business systems.

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