

Document one process

One process, written down well enough that someone else could run it. This example follows a lead from first contact to a closed or lost deal, and shows the four things that make a process runnable: a map, an ownership matrix, an exceptions list, and a 30-day plan.

About this example. The business is illustrative: a 12-person home services company with an owner, an office manager, two estimators and a crew. It is not a Revuity client, and none of the figures describe a real company. Use it as a pattern, then replace every row with what is true in your business.

1 Name the process

Start and end points first. If you can't say where the process starts and stops, you can't tell who owns it.

FIELD	THIS EXAMPLE
Process	Lead to close
Starts when	A request comes in by phone, web form, or email
Ends when	The job is booked with a deposit, or the lead is marked lost with a reason
Exists to produce	Booked jobs, and a reason on file for every lead that didn't book
What goes wrong today	Web leads sit unanswered over weekends. Estimates go out, and nobody follows up. Nobody can say how many leads came in last month.

2 Process map

Every step in order. Mark each handoff between people, because that is where work goes missing.

STEP	WHO DOES IT	STARTS WHEN	PRODUCES	GOES TO	SYSTEM
1. Capture	Office manager	Request arrives	Lead record with contact, job type, address	Step 2	CRM

2. Qualify	Office manager	Lead record exists	Fit or no fit, and a site-visit slot	Handoff to estimator	CRM, shared calendar
3. Site visit	Estimator	Visit is booked	Measurements, photos, scope notes	Step 4	Phone, CRM
4. Estimate	Estimator	Scope notes are complete	Written estimate	Handoff to owner if over \$15,000	Estimating tool
5. Send	Estimator	Estimate approved	Estimate sent, follow-up date set	Step 6	Email, CRM
6. Follow up	Estimator	Follow-up date arrives	Answer, question, or next date	Step 7	Phone, CRM
7. Close	Office manager	Customer accepts or declines	Deposit and booked job, or lost reason	Handoff to crew schedule	Payments, CRM

3 Ownership matrix

One owner per step. A step with no owner, or with several, is flagged, not guessed.

STEP	DOES THE WORK	APPROVES	ASKED FIRST	TOLD AFTER
1. Capture	Office manager	None needed	None	Owner (weekly count)
2. Qualify	Office manager	None needed	Estimator (for odd job types)	Estimator
3. Site visit	Estimator	None needed	None	Office manager
4. Estimate	Estimator	Owner if over \$15,000	Crew lead (on materials)	Office manager
5. Send	Estimator	None needed	None	Office manager
6. Follow up	Unclear today	None needed	None	Office manager
7. Close	Office manager	Owner for any discount	Crew lead (on start date)	Crew, owner

Step 6 is the real finding. Estimators assume the office follows up, and the office assumes the estimators do. The fix is a decision, not software: in this example, the estimator who sent the estimate owns the follow-up.

4 Exceptions

The cases that break the normal path, how each is handled, and who it goes to when it can't be.

WHAT GOES WRONG	HOW TO HANDLE IT	WHO IT GOES TO
Lead arrives after hours or on a weekend	Auto-reply with a callback window. First call the next business morning.	Office manager
Customer goes quiet after the estimate	Three touches over 14 days, then mark lost with the reason "no response."	Estimator

Scope changes during the site visit	Re-estimate before sending. Note the change in the lead record.	Estimator
Customer asks for a discount	No discount at the visit. The request goes to the owner with the job value.	Owner
Job type the company doesn't do	Decline politely within one business day and mark lost with the reason "not a fit."	Office manager

5 30-day plan

Three changes, in order, each with an owner, a date, and a way to tell whether it worked.

CHANGE	OWNER	DUE	HOW YOU'LL KNOW IT WORKED
The estimator who sends an estimate owns its follow-up, with a date set in the CRM	Owner decides, estimators run it	Week 1	Every open estimate has a follow-up date and an owner
Weekend web leads get an auto-reply and a Monday-morning call list	Office manager	Week 2	No web lead waits more than one business day for a call
Every closed lead carries a reason: booked, not a fit, price, no response, or chose someone else	Office manager	Week 4	A monthly count of leads by reason, readable in five minutes

6 Open questions

What the map couldn't confirm. These go back to the people who run the process, never filled in with a guess.

- Is \$15,000 the right threshold for owner approval, or is it a habit nobody chose?
- Which system is the record for a lead's status: the CRM or the estimator's phone?
- Who covers follow-ups when an estimator is out for a week?

WHEN YOU WANT HELP WITH THE NEXT ONE

Two ways Revuity picks this up

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- **Operations Systems Design.** When you want Revuity to study the operation, price the cost of the friction, and design the fix with you.

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