AUTOMATION SPRINTS

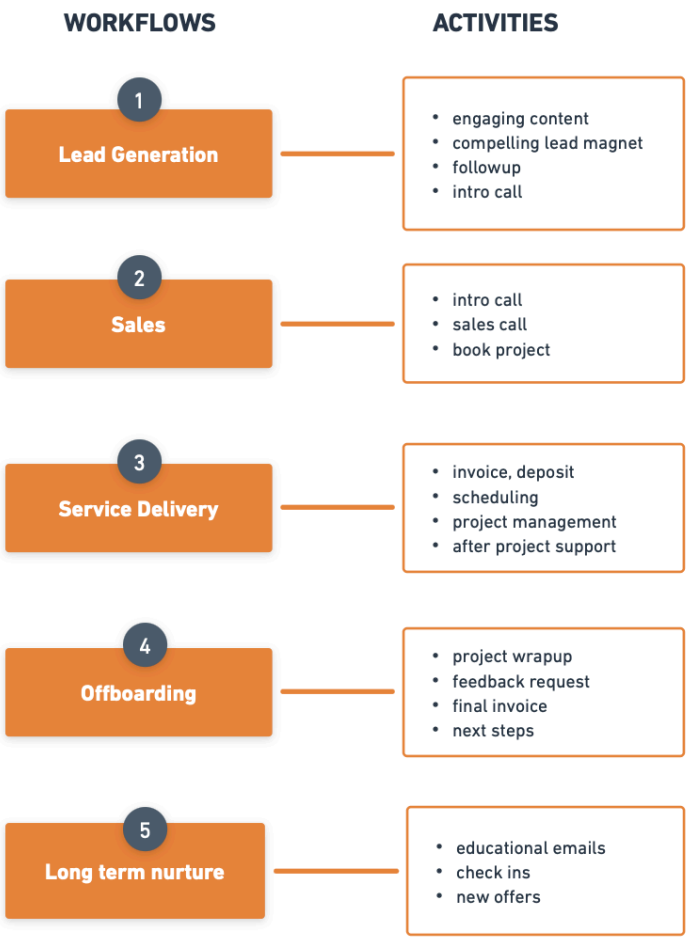
The 5 core workflows to simplify and automate your service-based business

So you can cut admin time and increase your profits

By breaking down your operations into defined workflows, you are able to look at each one separately and then figure out how each one can be streamlined and automated. This reduces the overwhelm of looking at everything at once, and allows you to work on one workflow at a time.

Each workflow has a job to do. And it has a start and an end, with some activities/actions in between. Each of your clients will move through each workflow, usually one at a time. When they have reached the end of one workflow, they can move onto the next, and work their way through all of them until their journey is complete.

There are 5 core workflows that most client service businesses have. Once you understand what they are, you can map yours out and find ways to automate them.



Within each workflow, there are various activities that have to take place before the workflow is complete. You might find yourself in a situation where some of them are automated, but a lot of them are done manually (if you're doing them at all).

By breaking down your workflows, and defining each activity within it, you'll be able to start to streamline and then automate parts of it (or all of it).

Once your workflows are automated, you and your team can focus on winning more clients and delivering more projects. That means more time on billable work, less on tedious admin, and ultimately, more revenue for your business.

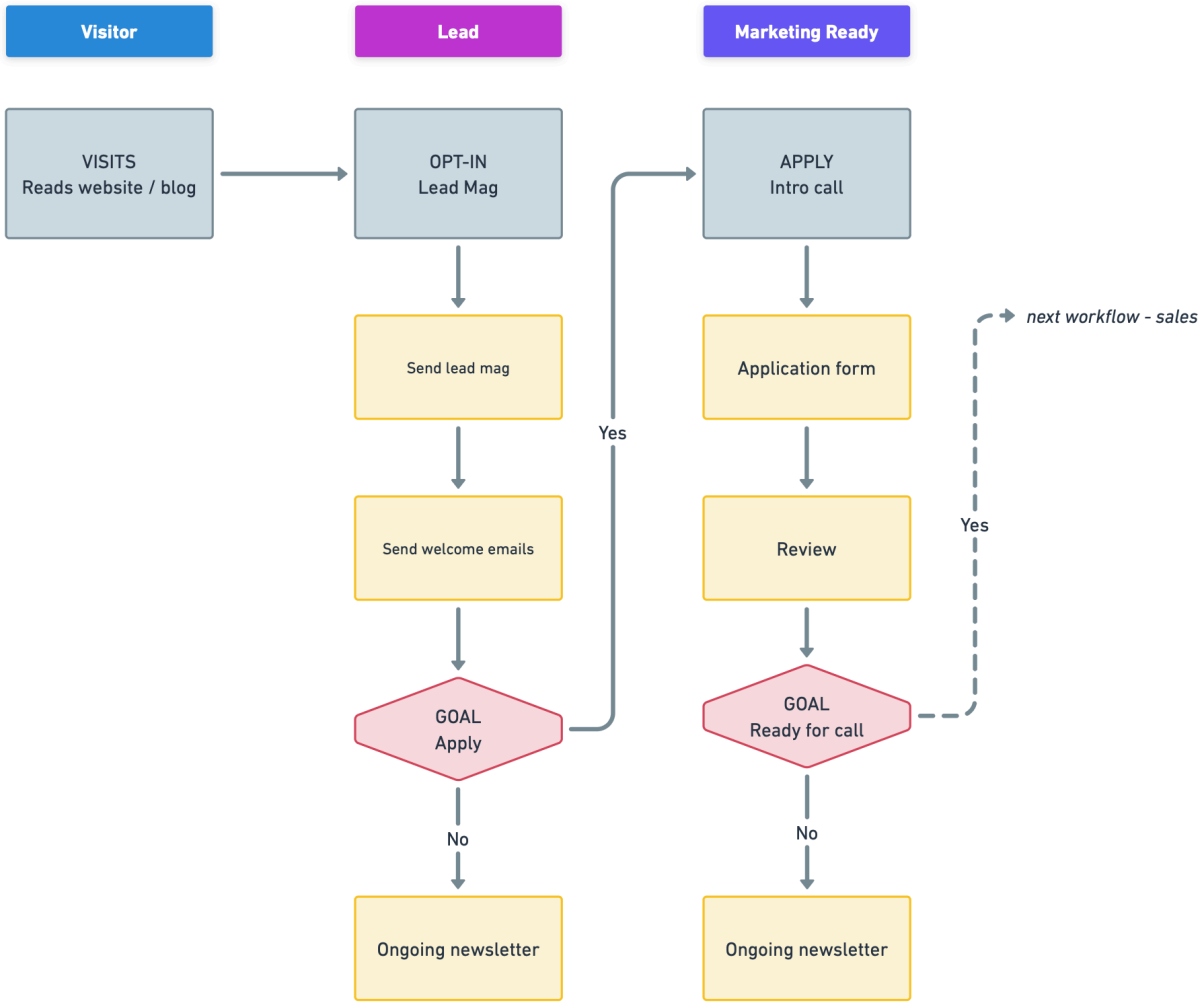
The Core Workflows

Let's look at each of the 5 core workflows for a client services business in more detail.

Lead Generation

Lead generation is all of the activities that happen in order to take someone from being totally anonymous to a known, qualified, lead and ready for a sales conversation.

As with all of these workflows, the exact steps will vary depending on your business and service offering, but this is an example lead generation process.



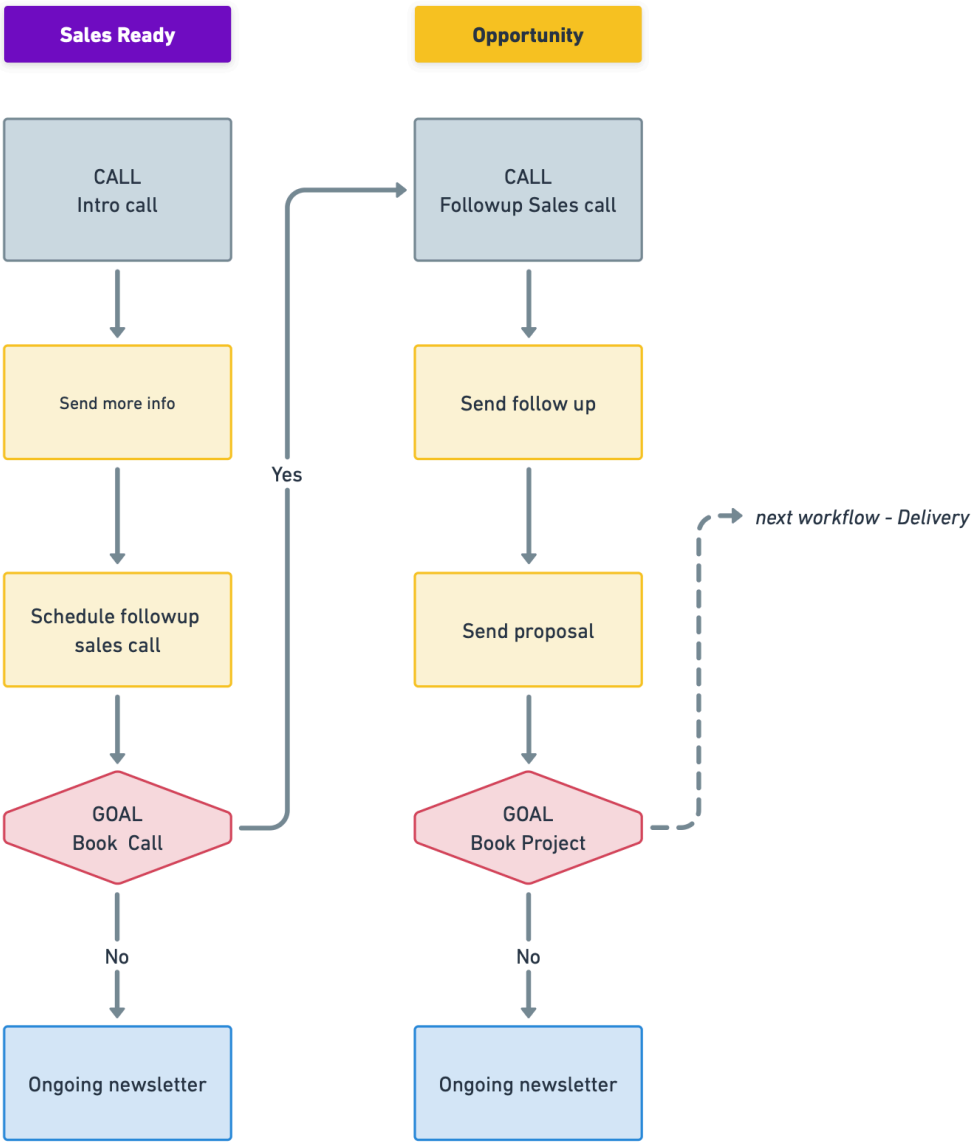
The goal of this workflow is to maximise the number of qualified leads to the next workflow: sales.

Each step in this workflow can be automated. Therefore, once it is built and live, it can be generating qualified leads for your business 24/7.

Sales

The next workflow is responsible for taking the qualified leads from the previous one, and converting as many of them as possible into clients.

This is what a sales process for a client service firm could look like.

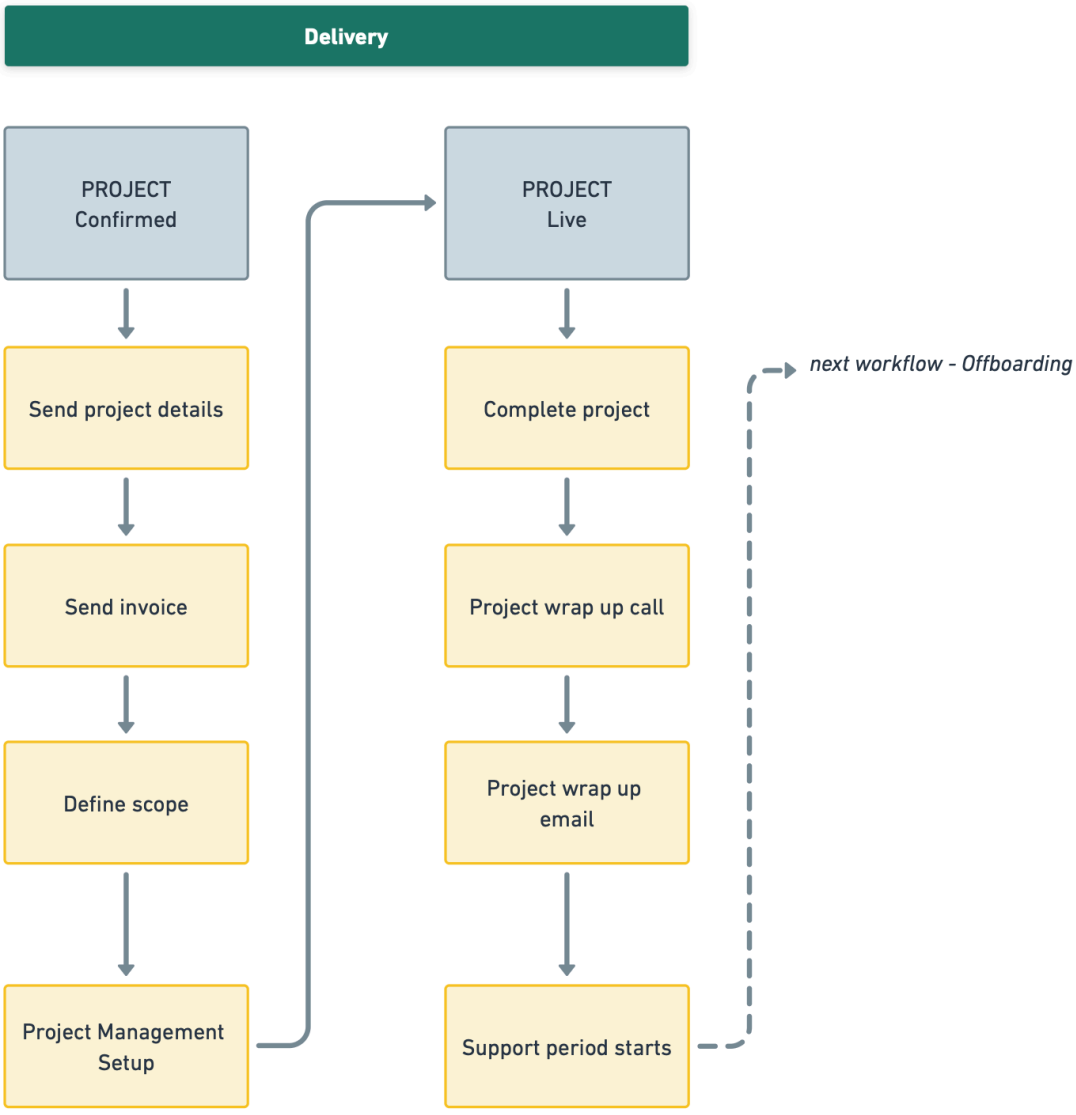


The goal of this workflow is to maximise the number of leads that are converted into paying clients.

Service Delivery

The next workflow is responsible for delivering the project for the client.

There isn't really a typical process here, as it will vary wildly depending on the type of service you deliver. I'll include the process for my sprint-based service business, just to provide an example.

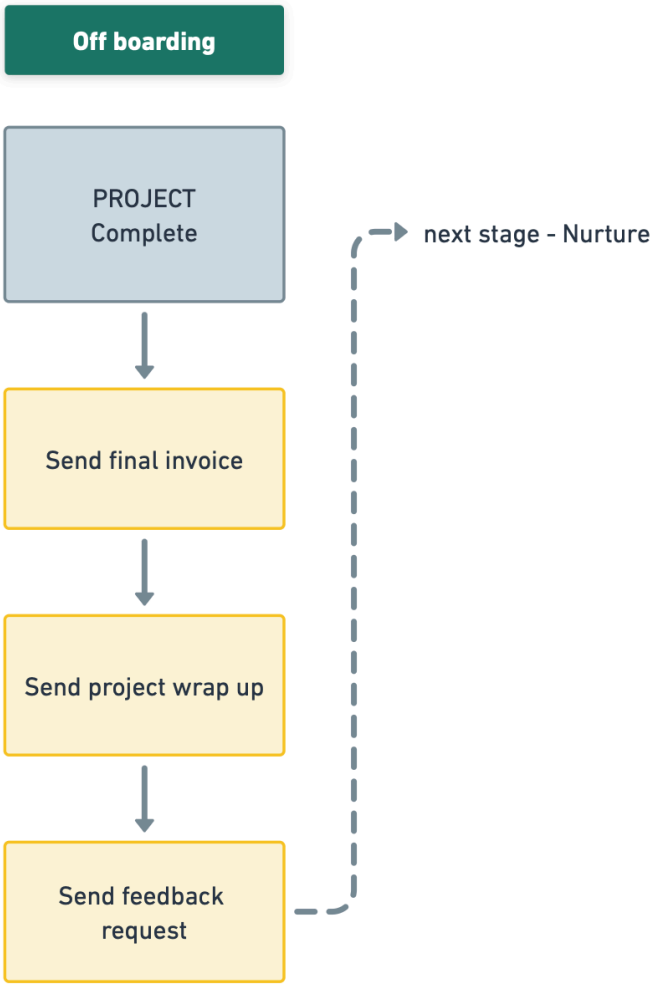


The goal of this workflow is to not only complete the project, but to do it in a way that keeps the client happy and satisfied. This involves effective project management, communication, collaboration and support.

Automation not only helps to save time here, but also to ensure that each client gets a consistent, high quality experience.

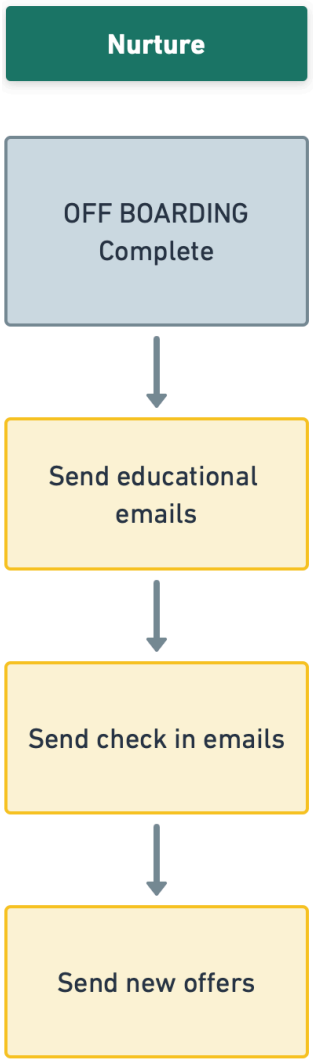
Offboarding

The next workflow is responsible for successfully offboarding the client once the project is complete. The goal here is to give them everything they need, get feedback and ensure they are satisfied with the service.



Long term nurture

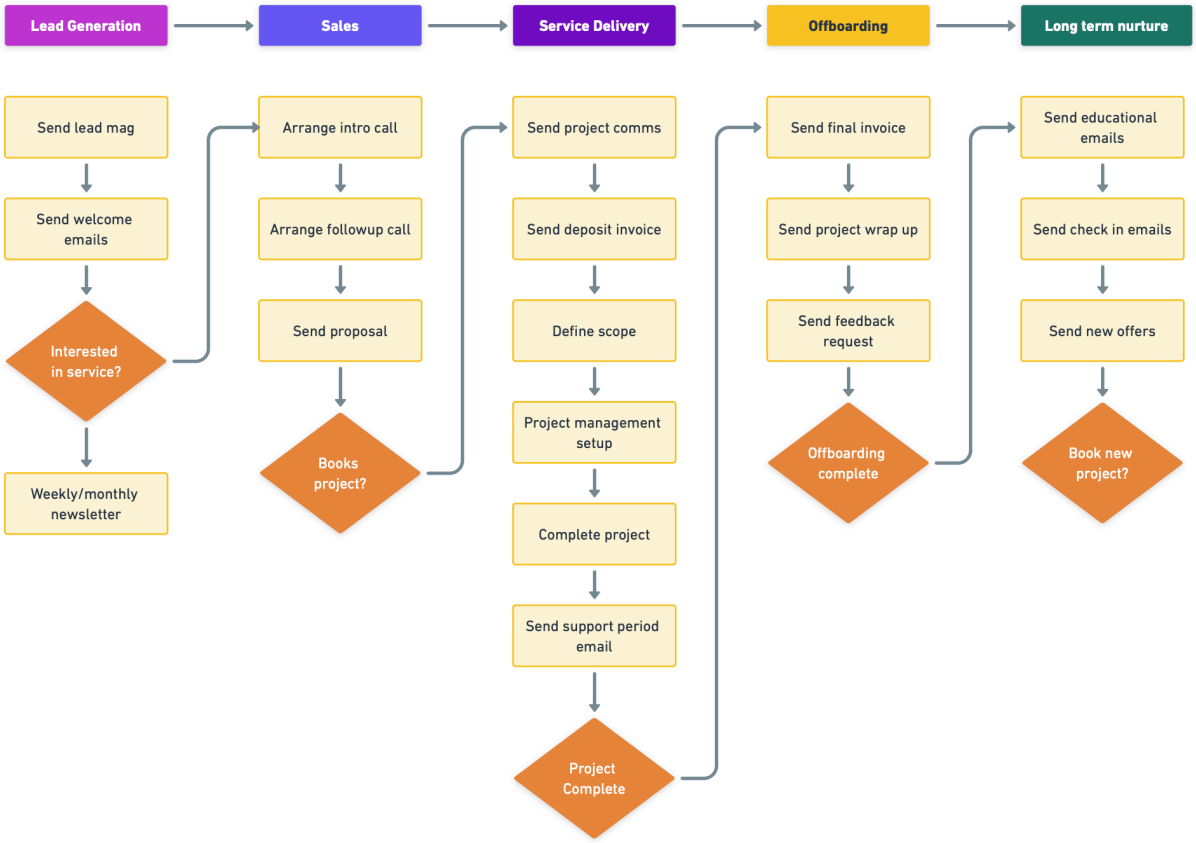
The next workflow is responsible for nurturing the client long term and encouraging them to book more projects and recommend you to other potential clients.



The goal with this workflow is to remain fresh in the mind of your past client, encourage them to book another project in the future and recommend you to people in their network.

Full process map

This is what the full process map looks like with all 5 workflows. As you can see, this is more overwhelming than looking at each workflow individually. But it can still be helpful to get an overview.



What to do next

I hope you enjoyed this guide on the 5 core workflows to simplify and automate your service-based business. When you map out your workflows, you can identify which parts can be automated. And then you'll be able to spend more time on billable work, rather than tedious admin, and therefore generate more revenue for your business.

If you are really serious about mapping out and automating your workflows and ready to take action, I have a new special offer for you - a free 20 min blueprint call to talk about how one of the core workflows can be defined and automated for your business.

Here's what we are going to do on the blueprint call:

1. **Review:** We'll review existing processes you have in place for one of your core workflows
2. **Highlight:** I'll highlight 3 to 5 key areas where you can improve the process and where you can automate it
3. **Flow:** We'll map out the workflow specially for your business

If you are ready to take action, click on the link below.

Book your blueprint call

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