

Diagnosis kit

Prepare the first meeting *in half an hour.*

Everything worth having at hand so the diagnosis gets straight to the point: what to bring, what we will ask, and a template to draw your own map before talking to anyone.

What comes out of the diagnosis

- A map of your operation: which tasks a system can take over, which stay with a person, and where to start.
- What each repetitive task costs today, worked out with your own numbers.
- A report that is yours even if you do not continue with us.

What to have at hand

- ☐ Three or four real documents of each kind: an invoice, an order, a delivery note or a job sheet.
- ☐ The list of software you use: management, invoicing, email, spreadsheets.
- ☐ Who does each task today, even from memory.
- ☐ The three moments of the month when work piles up the most.
- ☐ A rough idea of the hourly cost of whoever does those tasks.

There is no need to send anything beforehand. Having it in front of you during the meeting is enough.

Your map, drawn by you

Mark each task in a single column. «I don't know» is a valid answer, and it is exactly what the diagnosis answers.

Task	A system can do it	Stays with a person	I don't know
Invoices and payments			
Orders and quotes			
Bookings and calendar			
Email and customer queries			
Purchasing and suppliers			
Reports and data			

What we will ask you

- 01 Which task do you repeat most times a day?
- 02 Where is time lost waiting for someone or something?
- 03 Which mistakes keep coming back, and what does fixing them cost?
- 04 What information do you type twice in different places?
- 05 Which decisions really need a person's judgement?
- 06 What happens when the person who knows everything goes on holiday?
- 07 Which software can you not change, and why?
- 08 If one task disappeared tomorrow, which would you choose?

What it costs today, in one line

Documents per month $\times$ *minutes per document* $\div$ 60 $\times$ *hourly cost*

Example: 400 documents at 6 minutes each are 40 hours a month. At EUR 28 an hour, EUR 13,440 a year.

What now?

Ask for your diagnosis. The first conversation lasts half an hour, and if it is not a fit, we tell you on that same call.

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