

Your business shouldn't depend on any one person.

I turn the way your best people work into clear, repeatable systems the rest of your team can follow.

WHAT CHANGES



TRAIN PEOPLE FASTER

Give new hires something better than “follow Joe around for two weeks.”



GET CONSISTENT RESULTS

Give your team one clear, shared way to handle the work that matters.



STOP REPEATING YOURSELF

Give employees somewhere to look before they ask the same question again.



KEEP WORK MOVING

Make it easier for someone else to step in when a key person is out or leaves.

FOUNDING CLIENT PILOT

\$2,000 fixed fee • Up to 5 processes • One operational area

3 founding-client spots at this price. After that, the price changes.

Built for owner-led companies where important know-how still depends on a few key people.

From what's in their heads to a page they can follow.

WHAT YOUR TEAM SAYS

A "Calls usually go to Susan, unless a salesperson gets one directly."

B "Emergencies go to Mike. Regular jobs go into the CRM."

C "Don't schedule until we get approval. Some customers need a PO."

The finished SOP is built from what your team already knows.

THE FINISHED SOP

New Job Intake

Owner: Office Manager

PURPOSE

Every new job is captured, routed and approved before it reaches the schedule.

STEPS

- ☐ 1. Susan takes the call and logs name, address, phone and job description in the CRM. **A**
- ☐ 2. Emergency? Call Mike right away. Otherwise, the job goes into the CRM queue. **B**
- ☐ 3. Confirm the customer has approved the work. **C**
- ☐ 4. Does this customer require a PO? Get it before scheduling. **C**
- ☐ 5. Done when: the job record is complete. Then send it to dispatch.

EXCEPTION **A**

Salesperson took the call? They enter the job; Susan reviews it.

IF SOMETHING'S MISSING

No approval or PO after two business days? Tell the Office Manager.

Illustrative example. Real documentation uses your team's own steps, names and terminology.

Next: how the pilot works, and what it costs



Start with the part of your business causing the most headaches.

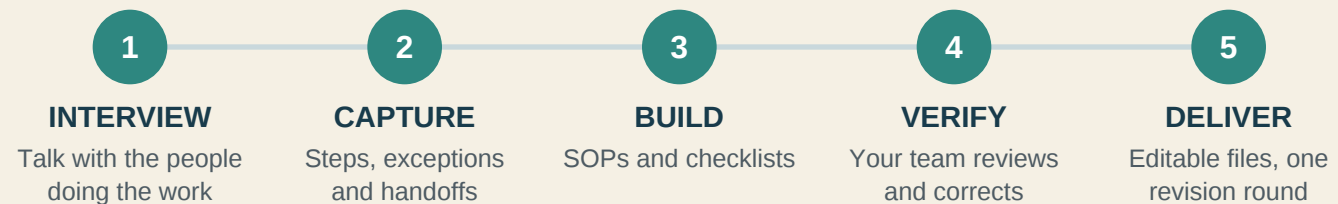
\$2,000 fixed fee

Up to 5 processes in one operational area

Each delivered as a concise SOP and/or checklist.

Process maps and onboarding guides can follow.

HOW IT WORKS



LOW BURDEN

Typical turnaround: about 2 weeks
after your team's interviews

Your team's time: just a few short interviews

LOW RISK

You review and approve the first process before I build the rest.

Want to get one part of your business out of people's heads?

Start with a 20-minute conversation.
Email or call me.

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Client subject-matter experts remain responsible for technical, legal, safety, regulatory, accounting, medical, and compliance accuracy.