

Business Process Discovery

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| Why complete this exercise? |

You’re here to improve how you manage company information and that directly impacts operational costs, process efficiency, data accuracy, security risks, and employee and client experiences.

This worksheet jumpstarts our conversation around your business and the “core processes” that make it unique! You may not have all the answers today, and that’s ok. This sheet gives you a format to engage with your team members to create a complete picture of your company.

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| Instructions |

* Complete this worksheet and share it with [allie.brittain@docuxplorer.com](mailto:allie.brittain@docuxplorer.com) before your Alignment Meeting.
* [Schedule your Alignment Meeting](https://calendly.com/docuxplorer/docuxplorerassessment), if you’ve not already done so.

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| Core Process Discovery |

Below are the **five core functions** of any business. You may be focused on improving one function or you may discover opportunities across other functions. This is your 30,000 ft view to help identify where to put your effort.

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| **Marketing**  How you attract strangers and get them interested in your business. |
| **Paint a picture of what your Marketing processes look like, major steps, documents and other details (good or bad) that you feel are relevant for us to understand.** |
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| **List the recurring Daily, Weekly, and Monthly tasks you and your team complete in this business function.** |
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| **Do you have any documentation around the processes listed or tasks that support or detail how they are to be completed?** |
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| **Sales**  How you convert interested leads to paying customers.  *We often see contract execution.* |
| **List all of the products and/ or services that your company offers** |
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| **Paint a picture of what your Sales Processes look like, major steps, documents, and other details (good or bad) that you feel are relevant for us to understand.** |
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| **List the recurring Daily, Weekly, and Monthly tasks you and your team complete in this business function.** |
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| **Do you have any documentation around the processes listed or tasks that support or detail how they are to be completed?** |
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| **Operations**  How you deliver your products and services, keep customers happy, and ‘run’ the business.  *This may include the new customer onboarding process, the process of delivering products and services, project management protocols, and the day-to-day functions of keeping the business running internally.* |
| **Paint a picture of your Operations processes, major steps, documents, and other details (good or bad) that you feel are relevant for us to understand.** |
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| **List the recurring Daily, Weekly, and Monthly tasks you and your team complete in this business function.** |
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| **Do you have any documentation around the processes listed or tasks that support or detail how they are to be completed?** |
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| **Finance**  How you watch the money in your business.  *We often see AP, AR, POs, Time sheets, etc…* |
| **Paint a picture of your Finance processes, major steps, documents, and other details (good or bad) that you feel are relevant for us to understand.** |
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| **List the recurring Daily, Weekly, and Monthly tasks you and your team complete in this business function.** |
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| **Do you have any documentation around the processes listed or tasks that support or detail how they are to be completed?** |
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| **Human Resources**  How you hire, orient, manage, review, promote retain, and fire people. |
| **Paint a picture of your HR processes, major steps, documents, and other details (good or bad) that you feel are relevant for us to understand.** |
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| **List the recurring Daily, Weekly, and Monthly tasks you and your team complete in this business function.** |
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| **Do you have any documentation around the processes listed or tasks that support or detail how they are to be completed?** |
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| Key Player Discovery |

Your core business functions impact the entire company. Understanding who is involved early on brings clarity and success to implementation.

Who is responsible for the success of this project? Who will be using it daily? Who makes the decision and cuts the check? Who knows these processes inside and out?

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| **Key Players** | | |
| **Full Name** | **Role** | **Email** |
|  | Project Lead |  |
|  | Subject Matter Expert |  |
|  | IT Lead |  |
|  | Decision Maker |  |
|  | Power User |  |
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| Technology Discovery | |
| Software Name | ITs use in your business |
|  | CRM |
|  | Email Suite (Google or Microsoft) |
|  | Software specific to your industry |
|  | Digital Signatures |
|  | Invoicing Clients |
|  | Payroll Platform |
|  | Other Software (add lines as needed) |