ADAPTING
SERVICES

HOW WE WORK

From scan to handover, in 7 clear stages

You always know what happens next, what you get and what we need from you. You decide at each stage whether to carry on.

1 Process Scan
2 Discovery call
3 Scoping
4 Proposal, solutions and roadmap
5 Deployment
6 Testing
7 Documentation

1 Process Scan

Start with the free online Process Scan (about two minutes), or the in-depth Process Scan with Sean ($350 CAD): a remote session that looks at your real tools and exceptions.

What you get: A report on where time is going, the problems worth fixing first, and tools that fit.

Your part: Answer a few questions about how the work happens today.

2 Discovery call

A free 30-minute call or meeting. We go through your scan, your goals and what is getting in the way, and check whether we are the right fit.

What you get: A straight answer on whether it is worth doing, and what the next step would be. No obligation.

Your part: Bring your scan report and the one or two problems that cost you the most.

3 Scoping

We look closely at the processes, people, tools and data involved, map how the work runs today, and agree what is in and out of scope and what success looks like.

What you get: A clear scope, the baseline we will measure against, and the risks to manage (including privacy and data).

Your part: Give us access to the people who do the work and examples of real jobs.

4 Proposal, solutions and roadmap

A written proposal with the recommended fixes and tools, a roadmap of what happens in what order, and the price, agreed before any work starts.

What you get: A plan you can say yes or no to, with no surprises on cost.

Your part: Review it, ask questions, and decide.

5 Deployment

We set up the tools, workflows and automations, connect the apps you already use, and train your team on their own real tasks.

What you get: The new way of working, live, with your people able to use it.

Your part: Make time for the team to be trained and to try it on real work.

6 Testing

We run it on real work with your team, measure it against the baseline from scoping, and fix anything that does not fit before signing off.

What you get: Evidence that it works: time and quality compared with before.

Your part: Use it for real and tell us what gets in the way.

7 Documentation

We write up the new process as simple procedures and checklists, name an owner for each one, and hand everything over.

What you get: Written procedures, how-to guides and named owners, so it keeps working after we leave.

Your part: Agree who owns each process going forward.

Start with stage 1

Take the free Process Scan (about two minutes, no email needed), or book a free 30-minute discovery call.

adapting-services.ca/process-scan · Book a discovery call