

Module 5: Systems That Scale

Summary

Use process standardization and automation to remove friction and improve execution consistency.

Sections & Action Items

Standardize Processes

- Map customer journey end-to-end
- Define ownership at each stage
- Document order workflows

Automate Repetitive Tasks

- Automate lead follow-ups
- Use estimate templates
- Reduce manual entry tasks

Connect Field & Suppliers

- Use real-time pricing tools
- Track orders and deliveries
- Improve communication between field and office

Reflection Question

If volume doubled tomorrow, where would your process break first?

Next Steps

1. Document one workflow
2. Automate one repetitive task
3. Improve pricing/order visibility

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Module 5 Worksheet: Systems That Scale (Execution Audit)

1. Process Flow Audit (Map Your Workflow)

Core Workflow (Lead → Close): _____

Where do handoffs break down? _____

Where do errors or delays happen most often? _____

Do we have this process documented? Yes No

Process Maturity Score (1-5): _____

1 = Not documented | 5 = fully standardized & consistent

2. Automation Opportunities (Remove Repetitive Work)

Identify repetitive tasks consuming time:

- _____

- _____

Which can be automated?

- _____

What is currently happening manually? _____

Automation Maturity Score (1-5): _____

1 = Fully manual | 5 = automated & consistent

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3. Field + Office + Supplier Connection

Are pricing updates real-time? Yes No

Are orders tied directly to jobs? Yes No

Do field teams have visibility into deliveries? Yes No

Where is miscommunication happening? _____

Integration Maturity Score (1-5): _____

1 = disconnected | 5 = fully synchronized

4. Execution Friction Analysis

Where do jobs slow down most often? _____

What causes delays? (check all that apply):

Missing info

Ordering issues

Communication gaps

Manual processes

Top friction point to fix this month: _____

5. Action Plan (Next 30 Days)

1 Process to standardize: _____

1 Task to automate: _____

1 Visibility issue to fix: _____

Owner: _____

Deadline: _____

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