

BIRCHLINE SUBSCRIPTIONS, INC

Business Growth Worksheet

A practical worksheet for identifying opportunities, simplifying operations, and planning practical technology solutions tailored to your goals.

How to use this worksheet

1. Fill it in on your computer, or print it and write by hand.
2. Answer in plain words. Short answers are fine.
3. Send your finished worksheet to Birchline for a FREE analysis.

Send your worksheet for a FREE analysis

Discovery

Understand what the business needs and where work becomes difficult.

Example: customers wait on hold while staff look up their order.

What is one business goal you want to improve?

Where do customers or staff experience delays, confusion, or repeated work?

Who experiences this problem, and how does it affect their day?

What have you already tried? What got in the way?

SECTION 2 OF 5

Existing Technology

List the tools used from the first customer interaction to the final handoff.

Example: customer details are typed into both the website form and the billing system.

Tool or system / What it does / Who owns it

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Where is information entered twice or copied between tools?

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Check any that sound familiar:

- ☐ Customer details are retyped into another system.
- ☐ Staff search multiple places for the same information.
- ☐ Work waits because the next person is not notified.
- ☐ No one clearly owns updates, access, or data quality.

Which handoff needs attention first?

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Learn more online: birchlinesubscriptions.com/connect

Automation

Choose a stable, repeatable task and keep a person accountable for the outcome.

Example: when a form arrives, the right person is notified automatically.

A good first automation usually looks like this:

- ☐ A task happens frequently and follows consistent steps.
- ☐ The information needed is available and reasonably accurate.
- ☐ Exceptions can be recognized and handed to a person.
- ☐ A process owner can review results and correct errors.

Task / Trigger / Information needed / Expected result

One line each: what happens, what starts it, what it needs, what good looks like.

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Which decisions or exceptions must stay with a person?

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How will the team review accuracy and handle a failed handoff?

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Learn more online: birchlinesubscriptions.com/automate

Communications and Growth

Review how people find your business, ask questions, and become customers.

Example: after-hours callers hear a helpful greeting and leave a message that reaches the right team.

Check any that are true today:

- ☐ Website information clearly explains the next step.
- ☐ Incoming inquiries reach the right person or team.
- ☐ Reception and after-hours handling reflect business policies.
- ☐ Human follow-up has an owner and a clear process.
- ☐ Marketing messages reflect consent and customer preferences.
- ☐ Trade publications help the team understand its industry.

Where does a customer conversation lose momentum?

What should happen next, and who should own it?

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Priorities

Compare opportunities and agree on what to test first.

Example: start with the smallest change that saves staff time every day.

Opportunity / Expected impact / Effort / Dependencies / Owner

List two or three options, one per line.

Before you commit, confirm:

- ☐ The problem and intended outcome are clearly defined.
- ☐ The people affected can participate in a small pilot.
- ☐ Access, permissions, and data handling are understood.
- ☐ There is a way to pause, correct, or reverse the change.

What will you test, and what evidence will you compare?

Who reviews the result, and when will you decide the next step?

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SECTION NEXT

What Happens Next

How Birchline works with you after you send this worksheet.

- 1. Discover** We talk with you and learn where work slows down.
- 2. Listen** We identify pain points and map your existing tools.
- 3. Build** We design a practical solution around your goals.
- 4. Deploy** We put it to work with your team, in stages.
- 5. Iterate** We review results together and improve over time.

One partner. Five ways to grow.

Discovery: assess business needs.

Automation: AI and workflow systems.

Communications: voice, reception, and engagement.

Growth: marketing and outreach.

Ventures: new products born from client demand.

Talk to Birchline

Contact us: birchlinesubscriptions.com/contact

BIRCHLINE SUBSCRIPTIONS, INC

From insight to impact.

Birchline talks to clients. Birchline discovers pain points.
Birchline builds solutions. The best solutions become products.
Products become standalone brands.

Ready for your free analysis?

Send your completed worksheet and we will review it with you.

Send my worksheet for a FREE analysis

Talk to Birchline

Explore Birchline services