AUTOMATION READINESS ASSESSMENT

Operational Maturity Report

Prepared for **jonathanfeldman@hotmail.com**
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*This report was generated by the **NextCoreFlow Automation Readiness Assessment** based on your 19 answers.*

Tier: **Fragile**

32
of 100

For a 20-person insurance agency with a heavy service load, the combination of manual renewals, tribal knowledge, and reactive culture puts core operations at risk during seasonal spikes or growth.

Most businesses completing this assessment score between 35 and 60. Your score reflects where structure exists versus where people are compensating. It is diagnostic, not a grade.

At a Glance

✓ **What's holding:** Your team shows strong internal awareness and avoids catastrophic breakdowns by catching issues before clients do.

⚠ **Biggest risk:** Manual renewal and service operations are unsustainable at your scale and will crack under 20% growth.

➤ **Start here:** Start by mapping the renewal cycle in 3 tiers and documenting key handoffs in a shared tracker.

How to Use This Report

This report follows a clear path: where you stand today, what is at risk if nothing changes, and a phased plan to fix it. You can read it straight through in 10 minutes, or jump to what matters most:

Pressed for time? Read "What's at Risk" and the Week 1 Win box.
Planning mode? Read "The Roadmap" for the full phased plan.
Want help? Skip to "Your Next Move" at the end.

Where You Stand → What's Working → What's at Risk → The Roadmap → Next Move

Where You Stand

Pinnacle Risk Partners operates in a demanding, regulated industry where timing and accuracy are everything — and your team is doing heroic work to keep up. But the cracks are showing: service operations are stretched, tribal knowledge blocks scale, and renewals drain time that should be systemized by now. You're not flying blind, yet it takes manual triangulation to understand status. As your 20-person team takes on more clients, this current model won't scale without more friction or errors. You're not starting from zero — you have Epic and some process instincts — but this is a coordination and process architecture challenge more than a tooling one.

> 🔍 **DIAGNOSTIC INSIGHT**
>
> *You don't have a renewal problem — you have a manufacturing line without a conveyor belt. The same steps repeat every quarter, yet lack of structured flow, shared visibility, and controlled triggers means your team is assembling each cycle from scratch. Until renewal is framed as a gated workflow (a defined sequence where each step must be completed before the next unlocks), automation will only ever be partial, and burnout will be inevitable.*

Visibility & Awareness
WEAK

Your team notices when work is stuck, but only because team members are vigilant — not because systems surface these delays. To answer basic questions about backlog or status, you have to ask multiple people. Confidence in follow-through varies week to week. This reactive visibility increases coordination costs and masks bottlenecks until they become urgent.

Organizational Fragility
WEAK

Several efforts stall when key people are out, and execution consistency depends on the individual. Work frequently falls into heroics mode for fixes, and the team regularly experiences confusion and follow-up misses when things get busy. These signs point to high reliance on institutional memory and a lack of shared systems that scale.

Process Debt
WEAK

Your core workflows are informally documented and live primarily in email threads, with no systemic sequencing or automation. Temporary workarounds often persist, especially in renewal processing, where your team feels like they're starting over every quarter. This accumulated process debt limits throughput and multiplies training time for new hires.

Visibility & Awareness	Organizational Fragility	Process Debt
WEAK	**WEAK**	**WEAK**

These dimension ratings set the context. Next: what you have to build on.

What's Working

✓ **Internal vigilance prevents client-facing issues**
You're not waiting for clients to complain — work blockages get noticed by your team first. That speaks to strong internal ownership and prioritization, even amid operational drag.

✓ **You avoided worst-case execution pitfalls**
You're not in chaos: although execution depends on the individual, handoffs aren't completely ad hoc, and your documentation is outdated rather than nonexistent. These distinctions matter — you have starter materials to build from.

✓ **You know where the pain is and why it matters**
Your answers around renewals and CSR overload are specific, urgent, and operationally astute. You've already pinpointed what's breaking now and what would break next — that clarity is rare and valuable.

With those foundations in mind, here is where growth will create pressure.

What's at Risk

The gaps below are not isolated issues. They connect to each other and compound under load. Here is what the assessment reveals, followed by what happens to these patterns if the business grows.

HIGH **Renewals are a manual reinvention loop**

Despite being predictable, renewals trigger labor-intensive sprints every quarter. Without automation or structured sequencing, your team has to recreate coordination every time — draining hours and exposing you to deadlines and errors. This cycle will break under growth without systemic redesign.

Connected signals: Q4, Q8, Q18

HIGH **Service capacity is capped by tribal knowledge**

Your CSR team is already stretched, and the steep onramp for new hires — due to undocumented workflows and person-specific knowledge — means you can't scale service capacity fast enough to meet policy growth. This creates execution fragility and increases burnout risk.

Connected signals: Q3, Q7, Q19

MEDIUM **No control tower for operational visibility**

Answers require pinging multiple people instead of checking a dashboard or shared control sheet (a centralized info hub). This creates reactivity, bottlenecks collaboration, and hides recurring delays until they escalate.

Connected signals: Q2, Q5, Q6

MEDIUM **Breakdowns require heroics, not repair**

When something breaks, it takes improvisation rather than making a system-level fix. Without feedback loops to translate breakdowns into process or system adjustments, the same fires will keep recurring.

Connected signals: Q9, Q13

What Happens at 20–30% Growth

Primary risk: Your ability to service the book will collapse under growth due to constrained CSR capacity and unscalable manual processes.

Why it compounds: Renewal coordination and client service are heavily manual, undocumented, and rely on a handful of experienced staff. The long training timeline for new CSRs and lack of structured visibility compounds the problem. Without sequencing and automation, each 90-day cycle creates a new firefight instead of a repeatable system.

What needs to be true: To scale, you'll need structured workflows for renewals and service, documentation that enables delegation, and system visibility that reduces coordination friction. With these in place, automation becomes viable and growth becomes absorbable without burnout.

The math: If each of 3-4 staff spend 15-20 hours per renewal cycle coordinating 600 policies, that's 180–320 hours per quarter — roughly $5K–$9K per cycle in labor time lost to preventable friction.

The same missing sequencing that causes manual churn during renewals also hides early indicators of diminishing profitability per client.

Now you know what is at stake. Here is the plan to address it.

The Roadmap

This section combines what to build with when to build it, organized as a phased plan. Each phase unlocks the next. Start with the Week 1 Win.

➤ WEEK 1 WIN: START HERE

Map and Sequence the Renewal Workflow

Start by mapping out the renewal lifecycle in 3 tiers: early outreach, application coordination, and remarketing/binding. This gives you a shared language and sets the stage for automation. Have your Ops lead and one CSR co-design a control board that shows exactly where each policy is in the process.

Done in 7 days means:
- ✓ **Tiered renewal workflow diagram**
- ✓ **Shared control board with status fields**
- ✓ **Defined handoffs with owner roles**

🎯 **Goal: reduce coordination email volume and missed steps during current renewal cycle by 30% within 2 weeks.**

Why this first: *Your team is already in the fire — this turn-key mapping gives immediate relief without requiring system overhaul.*

Phase 1: Stabilize Renewal and Service Workflows   Weeks 2-5

2

Template Outreach and Reminder Cadence

Create standardized email templates and timelines tied to expiration dates to reduce manual follow-up planning. You can use Epic's campaign tools or even basic CRM integrations.

Medium complexity | 2-3 weeks | *Once the process is mapped, adding automation to fixed touchpoints amplifies consistency and frees up manual hours.*

⚠ *If Epic automation setup is complex, begin with Google Calendar reminders and canned responses staged in your email client.*

3

Document CSR Micro-Processes

Break down high-frequency CSR tasks into step-by-step guides: certificates, endorsements, service requests. Use screenshots and real examples. Assign each guide to a team member to own and keep current.

Medium complexity | 2-3 weeks | *Codifying tribal knowledge reduces ramp time for new CSRs and lessens your reliance on a few institutional veterans.*

What this looks like: Treat renewals like a product line — with a scoped process map, documented handoffs, and a control board (shared tracker or dashboard) that lets you see status at a glance. Sequencing this flow allows selective automation, like templated outreach or carrier remarketing triggers based on expiration dates.

Example: *A 25-person regional insurance brokerage used Trello alongside Applied Epic to map a 5-stage renewal process and introduce auto-reminders at each phase. Within 2 months, they cut coordination emails by 40% and reduced last-minute rushes by more than half.*

Phase 2: Expand Service Capacity with Intake and Delegation   Weeks 5-10

4   Implement Intake and Routing for Service Requests

Centralize CSR requests via form intake (Google Form or Typeform) that routes to a queue for tracking and assignment. Align it with micro-SOPs so even unfamiliar team members can help when capacity is tight.

High complexity | 3-5 weeks | *You need to scale your service capacity before growth hits — intake clarity is the first precondition.*

⚠ *If full routing logic is too complex, start with a shared inbox and color-coded tags before layering form logic.*

What this looks like: Codify CSR tasks (certificates, endorsements, claims intake) into modular SOPs and service queues, then connect these to intake forms or triggers. This reduces onboarding time for new hires and creates partial load balancing (where others can step in easily).

Example: A 15-person agency built dynamic SOPs using Notion and linked service request types via forms. Combined with Epic's activity setup, they reduced CSR ramp time from 6 months to 90 days and enabled temporary coverage during PTO without service interruption.

Phase 3: Add Operational Visibility Layer   Weeks 10-16

5   Build a Simple Operations Dashboard

Pull key renewal and service data into a live view: X expiring in 30 days, Y received responses, Z pending billing. Use Excel, Airtable, or Epic reporting exports to populate the basics. This gives you a heartbeat view before full integration.

Medium complexity | 3-5 weeks | *You can't optimize what you can't see — even a basic ops dashboard reduces status checks and uncovers hidden backlogs.*

⚠ *If real-time Epic integrations aren't available, set up weekly export routines for now to keep dashboards fresh enough.*

What this looks like: Establish a status dashboard or tracker for renewal, service, and follow-up queues. This 'control tower' (centralized live view) cuts delays, enables early intervention, and reduces time lost to email chains or unsure ownership.

Example: A 60-policy-per-month insurance shop implemented live dashboards in Airtable synced with Epic exports to monitor follow-ups and status. This reduced turnaround delays and cut "where are we on this?" Slack messages by 65%.

Implementation Timeline

A visual overview of the full roadmap, from your Week 1 Win through long-term profitability improvements.

Wk 0–2	➤ **WEEK 1 WIN**
	Map and Sequence the Renewal Workflow
	🎯 *Goal: reduce coordination email volume and missed steps during current renewal cycle by 30% within 2 weeks.*

Wk 2–5 3 weeks	**Phase 1: Stabilize Renewal and Service Workflows**
	Step 2	Wk 2–5	Medium **Template Outreach and Reminder Cadence**
	Step 3	Wk 2–5	Medium **Document CSR Micro-Processes**

Wk 5–10 5 weeks	**Phase 2: Expand Service Capacity with Intake and Delegation**
	Step 4	Wk 5–10	High **Implement Intake and Routing for Service Requests**

Wk 10–16 6 weeks	**Phase 3: Add Operational Visibility Layer**
	Step 5	Wk 10–16	Medium **Build a Simple Operations Dashboard**

Full roadmap: 16 weeks • 5 steps • 3 phases

Making It Stick

A good plan fails without the right conditions for execution. This section covers two factors that will determine whether these changes hold: your team's readiness for change and the role your current tools play.

Change Readiness   CAUTIOUS

You're curious and open to change but still unclear on where to start. Prior attempts likely underdelivered, and you're wary of investing in the wrong tool or path. Focusing first on clarity — not implementation — will help you build confidence before committing major resources.

Tech Stack Observation

You're already on Applied Epic and mention underutilized features, especially automation and integrations. Start by extracting more value from what you have — review Epic's task automation and activity reporting tools. Integration isn't the issue — process definition is.

You have the diagnosis and the plan. Here is how to put it in motion.

Your Next Move

> You're right: this isn't about ripping everything out. It's about building a conveyor belt to carry the work you already understand. The first step — mapping and sequencing renewals — gives you control, clarity, and immediate relief. Start there and momentum will follow.

Want a Second Set of Eyes?

This report gives you enough to start on your own. But if you would rather shortcut the trial and error, we run a focused 60-minute Assessment Deep Dive where we walk through your results together and build a **concrete 90-day action plan** tailored to your team, tools, and priorities.

You will walk out of the session with:

- ✓ **A prioritized 90-day action plan**
- ✓ **Clear owners for each step**
- ✓ **Specific tool recommendations for your stack**
- ✓ **A realistic timeline your team can commit to**

We recommend you and whoever owns finance or operations join this session so decisions can actually move forward.

No pitch, no pressure. Just a working session with someone who has done this before.

Email us at **info@nextcoreflow.com** or **book a slot here**