

FROM AD HOC WORK TO A STRUCTURED OPERATING SYSTEM

DIGIMAR — DIGITAL MARKETING AGENCY · BIHAĆ, 2026



DISCOVERY
WORKSHOP



BPMN
MODELING

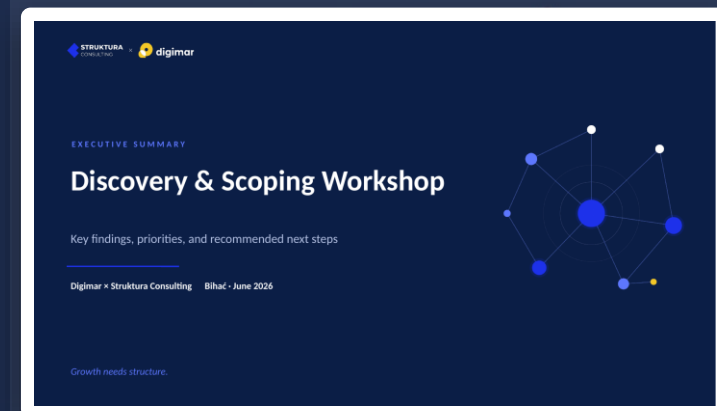


STEP-LEVEL
ANALYSIS

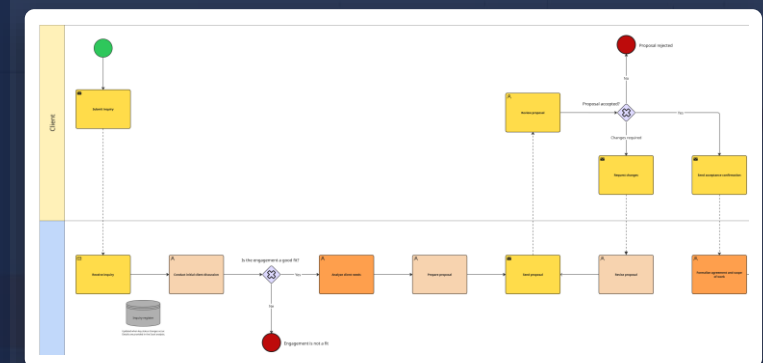


90-DAY
ROADMAP

45 process steps · 32 backlog actions · 14 KPIs · 3 implementation waves



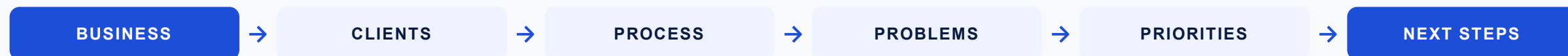
Step ID	Phase	Description	Type	Responsibility	Due date	Key findings / notes	Standard process recommendations	Recommended process	Recommended steps	Business impact
001	PS	Initial meeting	Task	Client	2026	Initial meeting with client and the project manager to discuss the project goals, scope, and timeline.	Initial meeting with client and the project manager to discuss the project goals, scope, and timeline.	Initial meeting with client and the project manager to discuss the project goals, scope, and timeline.	Initial meeting with client and the project manager to discuss the project goals, scope, and timeline.	Initial meeting with client and the project manager to discuss the project goals, scope, and timeline.
002	PS	Business analysis	Task	Client	2026	Business analysis to understand the current state of the organization and identify areas for improvement.	Business analysis to understand the current state of the organization and identify areas for improvement.	Business analysis to understand the current state of the organization and identify areas for improvement.	Business analysis to understand the current state of the organization and identify areas for improvement.	Business analysis to understand the current state of the organization and identify areas for improvement.
003	PS	Current state analysis	Task	Digimar + Client	2026	Current state analysis to identify the existing processes and systems.	Current state analysis to identify the existing processes and systems.	Current state analysis to identify the existing processes and systems.	Current state analysis to identify the existing processes and systems.	Current state analysis to identify the existing processes and systems.
004	PS	Future state analysis	Task	Digimar	2026	Future state analysis to identify the desired state of the organization.	Future state analysis to identify the desired state of the organization.	Future state analysis to identify the desired state of the organization.	Future state analysis to identify the desired state of the organization.	Future state analysis to identify the desired state of the organization.
005	PS	Gap analysis	Task	Digimar	2026	Gap analysis to identify the differences between the current and future states.	Gap analysis to identify the differences between the current and future states.	Gap analysis to identify the differences between the current and future states.	Gap analysis to identify the differences between the current and future states.	Gap analysis to identify the differences between the current and future states.
006	PS	Process proposal	Task	Digimar	2026	Process proposal to outline the recommended processes and systems.	Process proposal to outline the recommended processes and systems.	Process proposal to outline the recommended processes and systems.	Process proposal to outline the recommended processes and systems.	Process proposal to outline the recommended processes and systems.
007	PS	Design proposal	Task	Digimar	2026	Design proposal to outline the recommended design and architecture.	Design proposal to outline the recommended design and architecture.	Design proposal to outline the recommended design and architecture.	Design proposal to outline the recommended design and architecture.	Design proposal to outline the recommended design and architecture.
008	PS	Implementation proposal	Task	Client	2026	Implementation proposal to outline the recommended implementation plan.	Implementation proposal to outline the recommended implementation plan.	Implementation proposal to outline the recommended implementation plan.	Implementation proposal to outline the recommended implementation plan.	Implementation proposal to outline the recommended implementation plan.
009	PS	Review proposal	Task	Client	2026	Review proposal to outline the recommended review process.	Review proposal to outline the recommended review process.	Review proposal to outline the recommended review process.	Review proposal to outline the recommended review process.	Review proposal to outline the recommended review process.



Business Context & Project Driver

A digital marketing agency with six services and strong delivery, but no operating system. The goal was to create a model that prevents revenue loss and supports growth.

HOW WE WORKED THROUGH IT



Workshop guidelines

1. Focus on processes, not individuals
2. Concrete examples > general comments
3. We are not defending the system; we are describing reality
4. Problems = opportunities for improvement
5. Today we are not solving everything; we are choosing priorities.



THE PROBLEM

Delivery was not the problem.

Work depended on experience and informal coordination, not on an established operating system.

The way of working makes the difference, not necessarily the client quality.

25–30k

potential monthly revenue if all clients had been retained (estimate)

**Biggest opportunity:
Reporting**

3–4 h → a few min

with AI and a standard format it becomes a regular step, not a burden.

The end-to-end flow, drawn with the team in the room.

Every task, decision, and handoff between client and agency structured into one clear process. 45 steps · 5 phases

The main delivery problems traced back to onboarding.

The process existed in practice, but it just wasn't standardized. And the costliest gap sat exactly where nobody was looking.

FIVE ISSUES — RANKED BY IMPACT

1 Onboarding & client work planning

ROOT CAUSE

2 Work organization & performance

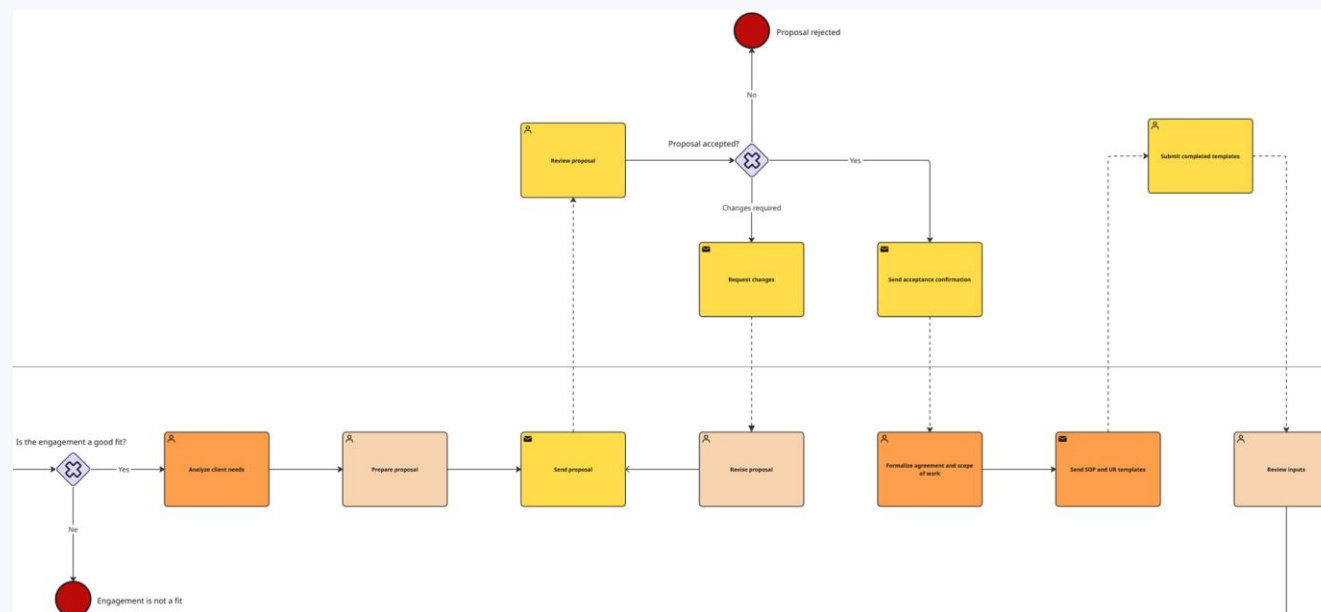
3 Client communication

4 Quality & results

5 Time & focus

Onboarding caused most of the friction — and was the one area the team's own sticky notes never named.

THE CRITICAL GAP — ONBOARDING HANDOFF



The acceptance → onboarding → work handoff, where roles, inputs, and scope lacked clear ownership.



Fixing the start fixes the flow.

Unclear start, insufficient input, undefined scope, and missing requirements introduce ambiguity that flows through the entire process.

Inside the Analysis Workbook

Step analysis — every step scored LOW / MID / HIGH criticality, with a concrete recommendation and the evidence that proves completion.

Step ID	Phase	Process step	Type	Responsibility	Criticality	Why it matters / risk	Standardization recommendation	Automation recommendation	Recommended action	Evidence / record
S01	F1	Submit inquiry	Task	Client	LOW	This is the process entry point and the potential client's first contact with Digimar.	—	—	—	Inquiry
S02	F1	Receive inquiry	Task	Digimar	LOW	Prompt intake and logging prevent lost leads, delays, and unclear responsibility.	Log all inquiries consistently, including status, responsible person, inquiry source, and first-response deadline.	Automate inquiry intake through a contact form, including logging, receipt confirmation, internal notification, and a response reminder.	Implement a single inquiry register with status, responsible person, and first-response deadline.	Inquiry record in the inquiry register
S03	F1	Conduct initial client discussion	Task	Digimar + Client	MID	An unstructured discussion may fail to capture the client's needs, objectives, expectations, budget, timelines, and the information required to assess fit.	Use a discovery call template with mandatory topics, notes, fit criteria, the outcome of the discussion, and the next step.	Use a scheduling link, an AI-generated discussion summary, automatic status updates, and automatic creation of the next task.	Implement a standard discovery call template with key questions and fit criteria.	Discovery notes and recorded outcome
S04	F1	Is the engagement a good fit?	Gateway	—	—	The decision is made based on clear criteria and available information.	—	—	—	Fit criteria and decision recorded in the register
S05	F1	Engagement is not a fit	End	—	—	End of the process or a controlled exit from the flow.	—	—	—	Reason for closing the lead
S06	F1	Analyze client needs	Task	Digimar	HIGH	Misunderstanding the client's needs affects the proposal, scope of work, expectations, and subsequent execution. It also increases the risk of unplanned scope expansion and additional rework.	Implement a client assessment template covering the client profile, current state, objectives, needs, expectations, risks, complexity, and the basis for the proposal.	Use AI to support the review of publicly available client information, summarize notes from the initial discussion, and prepare a first draft of the analysis.	Implement a standard client assessment template as a mandatory input for proposal preparation.	Client assessment
S07	F1	Prepare proposal	Task	Digimar	MID	The proposal defines the value, scope of work, price, deliverables, timelines, and responsibilities. Ambiguities can later lead to additional changes and misunderstandings.	Use a single proposal template linked to the needs analysis, with mandatory sections for scope, deliverables, timelines, price, responsibilities, and limitations.	Automatically pull data from the client assessment, use prewritten reusable text blocks, and use AI support when drafting the proposal.	Implement a standard proposal template that clearly defines the terms and scope boundaries of the engagement.	Proposal
S08	F1	Send proposal	Task	Digimar	LOW	How the proposal is sent affects the client's impression of professionalism and the clarity of the next step.	Use a standard message, a defined channel, a response deadline, a follow-up plan, and version/status tracking.	Use an email template, automatically record the send date and status, and set a follow-up reminder.	Use a standard message for sending proposals and track proposal status.	Sent proposal version and status
S09	F1	Review proposal	Task	Client	LOW	An unclear or overly detailed proposal may delay the decision and increase the need for additional clarification.	—	—	—	Client comments / feedback
S10	F1	Proposal accepted?	Gateway	—	—	The decision is made based on clear criteria and available information.	—	—	—	Client's written response
S11	F1	Proposal rejected	End	—	—	End of the process or a controlled exit from the flow.	—	—	—	Status: proposal rejected
S12	F1	Request changes	Task	Client	LOW	Unclear or fragmented feedback may lead to more revisions, longer turnaround times, and misunderstandings.	—	—	—	List of requested changes
S13	F1	Revise proposal	Task	Digimar	MID	Poorly managed revisions may lead to lost versions, scope expansion, and uncertainty about what has been accepted.	Introduce version control, a change summary, and confirmation that the requested changes have been incorporated before resending.	Automatically assign version names, notify the team of changes to the proposal, and link feedback to the relevant section.	Implement version control and a brief change summary for each proposal revision.	New version + change summary
S14	F1	Send acceptance confirmation	Task	Client	LOW	A written record of acceptance provides a clear signal to formalize the agreement and begin	—	—	—	Written evidence of acceptance
S15	F2	Formalize agreement and scope of work	Task	Digimar	HIGH	An unclear scope of work may lead to additional work, unclear responsibilities, and problems when the deliverable is reviewed and accepted.	Use a standard scope-of-work/agreement template covering objectives, deliverables, in-scope and out-of-scope activities, timelines, responsibilities, communication, and the approval process.	Use electronic signatures and automatic archiving, and transfer key data into the project record during setup.	Require confirmed scope of work or a contract before onboarding materials are sent. Clearly define communication methods and channels.	Confirmed scope of work / contract
S16	F2	Send SOP and UR templates	Task	Digimar	HIGH	A poorly prepared onboarding package can result in incomplete inputs, additional questions, and delays in starting the work.	Create a standard onboarding package by service type, with clear instructions, examples, responsibilities, and a deadline.	Automatically send the appropriate package when the status changes to "Proposal accepted," and send reminders automatically.	Implement a standard onboarding package containing all required SOP/UR templates, instructions, and deadlines.	Onboarding package and proof of sending

⚠️

Risk

why the step matters

📁

Standardize

template / checklist

⚙️

Automate

only once stable

📄

Evidence

the record it leaves

Backlog & Decisions

The analysis went beyond insight and gave the team what it could actually use: a prioritized plan and clear rules for every decision.

32 ACTIONS IN IMPROVEMENT BACKLOG

Action ID	Action	Type	Linked Step ID	Priority	Complexity	Impact	Score	Recommended wave	Evidence of successful implementation
A01	Implement a single inquiry register with status, responsible person, and first-response deadline.	Standardization	S02	HIGH	LOW	HIGH	15	Wave 1 - Days 0-30	All new inquiries are logged; ≥90% of first responses are sent within the defined deadline.
A02	Implement a standard discovery call template with key questions and fit criteria.	Standardization	S03	HIGH	LOW	HIGH	15	Wave 1 - Days 0-30	Complete notes and a recorded discussion outcome are available for ≥90% of inquiries entering fit assessment.
A03	Implement a scheduling link, AI-generated discussion summary, automatic status updates, and automatic creation of the next task.	Automation	S03	MID	MID	MID	10	Wave 3 - Days 61-90	Post-discussion administration time is reduced by ≥30%.
A04	Implement a standard client assessment template as a mandatory input for proposal preparation.	Standardization	S06	HIGH	MID	HIGH	14	Wave 1 - Days 0-30	100% of proposals have a completed client assessment before preparation begins.
A05	Use AI to support the review of publicly available client information, summarize notes from the initial discussion, and prepare a first draft of the analysis.	Automation	S06	MID	MID	MID	10	Wave 3 - Days 61-90	Analysis preparation time is reduced; 100% of AI-generated summaries are reviewed.
A06	Implement a standard proposal template that clearly defines the terms and scope boundaries of the engagement.	Standardization	S07	HIGH	MID	HIGH	14	Wave 1 - Days 0-30	100% of proposals use the standard proposal template.
A07	Implement a standard message for sending proposals and track proposal status.	Standardization	S08	MID	LOW	MID	11	Wave 2 - Days 31-60	All sent proposals have a recorded status and next follow-up date.
A08	Implement version control and a brief change summary for each proposal revision.	Standardization	S13	MID	MID	MID	10	Wave 2 - Days 31-60	Each revision has a clearly identified version and a recorded change summary.
A09	Require written confirmation of the scope of work or a signed contract before onboarding materials are sent, and clearly define communication methods and channels.	Standardization	S15	HIGH	MID	HIGH	14	Wave 1 - Days 0-30	100% of new engagements have confirmed scope of work before onboarding materials are sent.
A10	Implement a standard onboarding package containing all required SOP/UR templates, instructions, and deadlines.	Standardization	S16	HIGH	MID	HIGH	14	Wave 1 - Days 0-30	An onboarding package is defined for every active service type.
A11	Automate delivery of the appropriate onboarding package when the status changes to "Proposal accepted," and send reminders automatically.	Automation	S16	LOW	MID	LOW	6	Wave 3 - Days 61-90	Onboarding packages are delivered automatically in pilot cases without manual processing errors.

Each finding became an action, prioritized by impact and complexity, then assigned to implementation waves.

7 KEY PROCESS DECISIONS

Gateway ID	Phase	Decision	Decision owner	Required inputs	Criteria for "YES"	Evidence / record	Recommended KPI
S04	F1	Is the engagement a good fit?	Digimar	Inquiry; discovery notes; basic information on the client's needs, budget, timelines, and risks	The need is clear; the service matches Digimar's capabilities; expectations are realistic; capacity is available; the risk is acceptable	Completed discovery template and fit decision recorded in the register	% of fit decisions made within the defined timeframe
S10	F1	Proposal accepted?	Client	Final proposal with scope of work, price, timelines, responsibilities, and limitations	The client has accepted the proposal in writing	Final proposal and written acceptance (email, comment, or signed confirmation)	% of sent proposals accepted
S19	F2	Inputs complete?	Digimar	Completed SOP and UR lists and the related information and documents	All mandatory items in the SOP and UR lists have been completed and the required attachments have been provided	Completed inputs with their completeness status recorded	% of complete inputs on first submission
S25	F3	Project setup ready?	Digimar	Project record; folders; documentation; operational plan; responsible persons; deadlines; dependencies; communication rules	There are no unresolved issues preventing work from starting; all tasks have a responsible person and deadline; required access and sources are available	Recorded project readiness assessment	% of projects ready at the first check
S30	F4	Deliverable internally approved?	Digimar	Final deliverable; agreed scope; quality criteria; QA checklist; delivery version	All mandatory items pass the checklist; the deliverable is complete, accurate, and aligned with the agreed standard	Completed QA checklist and recorded approval status	% approved at the first internal review
S34	F5	Is the result satisfactory?	Client	Sent deliverable; acceptance criteria; feedback deadline	The client confirms that the deliverable meets the agreed criteria or provides only minor comments that do not require significant rework	Written confirmation	% of deliverables accepted at the client's first review
S42	F5	Will the engagement continue?	Client, with input from Digimar	Report; results; recommendations; priorities; budget and capacity	There is a confirmed need, demonstrated value, available budget, and agreement on the scope and objectives of the next cycle	Written confirmation of continuation and documented changes	% of engagements continued (renewal rate)

Every gate now has an owner, clear criteria, and a KPI that proves it.



The operating backbone

— together they turn a one-off analysis into a system the team can repeat without the consultant in the room.

90-Day Roadmap & KPI Framework

A practical 90-day plan to standardize, pilot, and automate in the right order.

THREE WAVES

WAVE 1 · 0–30

12 ACTIONS

Standardize

Core rules, templates, checklists & controls

WAVE 2 · 31–60

14 ACTIONS

Pilot

Standards live in tools, cycles run, first KPI data

WAVE 3 · 61–90

6 ACTIONS

Automate

Follow-ups, project workflow, AI-assisted reporting

ACTUAL SHEETS FROM EXCEL

RECOMMENDED 90-DAY IMPLEMENTATION ROADMAP

The sequence is based on the principle: first standardize and stabilize the process, then pilot it, and only then automate.

Wave	Period	Focus	Key actions	Main outputs	Exit criterion
Wave 1	Days 0–30	Establish core rules, templates, and control mechanisms	A01, A02, A04, A06, A09, A10, A12, A15, A17, A20, A26, A29	Inquiry register; discovery call and client assessment templates; proposal and scope-of-work standards; onboarding and input checklist; standard folder structure; project setup and QA checklists; reporting data standard	The team has approved the core standards, and all key parts of the process have defined rules, templates, and checklists ready for testing.
Wave 2	Days 31–60	Implement the defined standards in the selected tools and test them in practice	A07, A08, A13, A14, A16, A19, A21, A23, A24, A25, A27, A30, A31, A32	Operational plan; review and approval rules; standard for feedback and deliverable acceptance; report template; reporting frequency; standard next-cycle plan	One or two pilot cycles have been completed, initial KPI data have been collected, and the required updates to the standards have been documented.
Wave 3	Days 61–90	Automate stable and repetitive parts of the process	A03, A05, A11, A18, A22, A28	Automated follow-up tasks; AI support for analysis; automated delivery of onboarding materials; automated project creation; automated review workflow; AI support in preparing the first draft of the report	The automations have been tested and are stable, with a designated responsible person and a defined monitoring method. Their time savings and impact on error rates have also been measured.

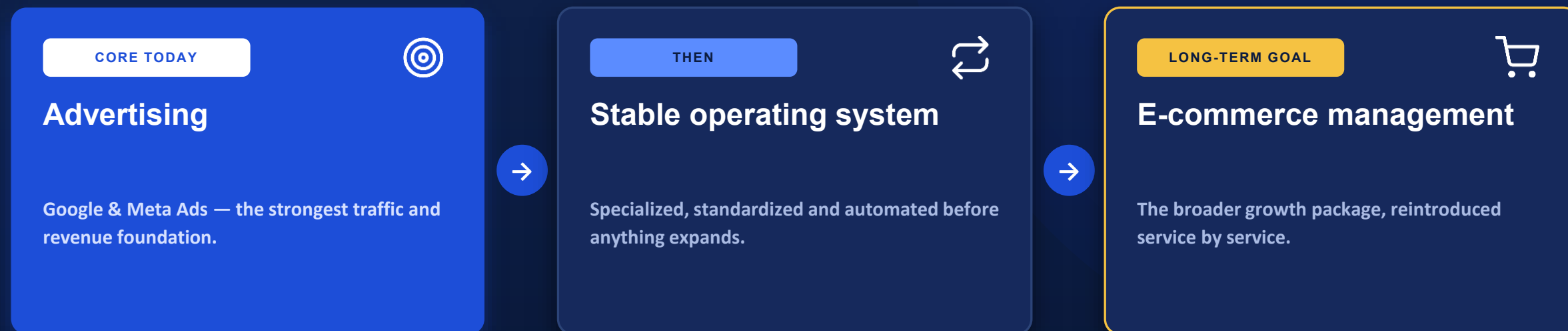
KPI FRAMEWORK FOR PROCESS MONITORING

The proposed targets are initial estimates. First, collect baseline data over one or two cycles, then refine the targets and define acceptable tolerances.

KPI ID	Phase	KPI name	Definition	Direction	Initial target for validation	Data source	Review frequency
K01	F1	First response time	Time from receipt of the inquiry to the first response	Lower is better	≤ 1 business day	Inquiry register	Weekly
K02	F1	Time to fit decision	Time from the first discussion to the recorded fit decision	Lower is better	≤ 2 business days	Discovery notes + register	Monthly
K03	F1	Proposal preparation time	Time from having sufficient information to sending the first version of the proposal	Lower is better	≤ 3 business days	Proposal status	Monthly
K04	F1	Acceptance rate for qualified proposals	Accepted proposals / all qualified proposals with a final decision	Higher is better	≥ 60% (validate)	Proposal register	Monthly
K05	F2	Inputs complete on first submission	Onboarding packages complete at the first check / total packages checked	Higher is better	≥ 80%	Onboarding checklist	Monthly
K06	F2	Onboarding time	Time from proposal acceptance until all required inputs are complete	Lower is better	≤ 5 business days (validate)	Onboarding status	Monthly
K07	F3	Project readiness rate at first check	Projects ready at the first readiness check / all projects	Higher is better	≥ 80%	Readiness checklist	Monthly
K08	F3	Project setup time	Time from complete inputs to approved project setup	Lower is better	≤ 2 business days	Project management tool	Monthly
K09	F4	First-pass internal approval rate	Deliverables approved without revision / all deliverables reviewed	Higher is better	≥ 80%	QA checklist	Monthly
K10	F4	Rework rate	Deliverables returned for revision / all deliverables reviewed	Lower is better	≤ 10%	Correction log	Monthly
K11	F4	On-time delivery rate	Deliverables sent by the agreed deadline / all deliverables	Higher is better	≥ 90%	Project management tool + delivery log	Monthly
K12	F5	Client first-pass acceptance rate	Deliverables accepted without revision / all deliverables reviewed by the client	Higher is better	≥ 85%	Client feedback / confirmation	Monthly
K13	F5	On-time reporting rate	Reports sent by the agreed deadline / all planned reports	Higher is better	99%	Calendar + delivery log	Monthly
K14	F5	Engagement continuation rate	Engagements or cycles that continue / all completed engagements or cycles	Higher is better	Set after the baseline has been established	Engagement status	Quarterly

The Strategic Path Forward

The engagement didn't end with an analysis. It set the strategic direction the business chose to grow by.



ON HOLD, NOT ABANDONED SEO, web design and the remaining services return once advertising is integrated and operationally stable.



Alem brings a very structured and analytical approach to business process optimization.



Mirza D.

Director of Marketing



VERIFIED UPWORK REVIEW