



Growth Infrastructure Blueprint™

Optimize Edition

Leadership Kit

**Everything You Need to Conduct Your First Growth
Infrastructure Blueprint™ Meeting**

The Growth Infrastructure Blueprint™ is more than an exercise; it's a structured leadership process designed to help you uncover hidden growth capacity inside your existing organization. Over the next nine steps, you'll move from identifying challenges to intentionally designing the infrastructure that supports sustainable growth.

9 Steps To The Growth Infrastructure Blueprint™



Step 1 — Build Trust

Create psychological safety and establish a shared vision before making change.

Step 2 — Build Alignment

Bring together the right leaders and perspectives to ensure every critical area of the business is represented.

Step 3 — Discover Strengths

Identify what people do best before discussing who does what.

Step 4 — Reveal the Work

Capture every recurring responsibility so the work becomes visible.

Step 5 — Identify the Bottlenecks

Separate work that must stay from work that could be shared, delegated, or redesigned.

Step 6 — Organize the Opportunities

Group related responsibilities together to uncover future roles and hidden growth opportunities.

Step 7 — Design the Future

Create roles around the work your organization truly needs...not around yesterday's organizational chart.

Step 8 — Build Ownership

Help your team understand the purpose behind the changes so they become partners in building the future.

Step 9 — Build Your Growth Roadmap

Turn insights into action by creating a practical implementation plan with clear priorities, accountability, and measurable milestones .

SECTION ONE

Welcome From Debbie Miller, Founder of 52 Weeks Marketing & Helper Heroes



Congratulations!

By downloading this Leadership Kit, you've already taken the first step toward building an organization that allows your best people to do their best work.

This isn't about hiring more people.

It's about helping the talented people you already have spend more time doing what only they can do.

Everything in this kit is designed to help you facilitate your leadership meeting.

Don't worry about perfection.

Just begin with the conversation & follow the steps.

You may be surprised by how much hidden growth your team uncovers.



Debbie Miller

SECTIONS TWO & THREE

Before You Begin: What You'll Need • Leadership Commitment



What You'll Need

- ☐ Leadership Team
- ☐ Sticky Notes
- ☐ Colored Dot Sheets (stickies)
- ☐ Flip Chart Paper
- ☐ Markers
- ☐ Dedicated Time
- ☐ This Leadership Kit

Suggested Participants

- ☐ Owner
- ☐ Operations
- ☐ Scheduler
- ☐ Recruiter
- ☐ HR
- ☐ Finance
- ☐ Marketing
- ☐ Client Care
- ☐ Other _____
- ☐ Other _____

MEETING OUTCOME

By the end of today's meeting you will have...

- ✓ Identified hidden work
- ✓ Protected your team's strengths
- ✓ Created an Opportunity Board™
- ✓ Built your first Growth Roadmap™

Leadership Commitment

Today... We commit...

- ☐ To challenge processes, not people.
- ☐ To remain curious.
- ☐ To focus on the future.
- ☐ To create opportunities, not blame.
- ☐ To support one another.

Leadership Team Signatures

Name	Signature	Date
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

SECTION FOUR

The Nine-Step Blueprint



The work begins here. Share this overview with your team and follow the steps below.

THE GROWTH INFRASTRUCTURE BLUEPRINT™

OPTIMIZE EDITION

A practical framework for uncovering hidden growth
inside your existing team.



The Thinking Behind This Step

Before you discuss new roles, new technology, virtual assistants, or organizational changes...

You must first shape the conversation.

When people hear the words "**new support**" or "**change**," they naturally begin asking themselves questions.

- Am I being replaced?
- Is my job changing?
- Have I done something wrong?

Those questions create uncertainty. And uncertainty creates resistance. The purpose of **Step One** is to replace uncertainty with opportunity.

Your leadership team needs to understand that this process isn't about taking work away from them. It's about giving them more time to do the work that only they can do.

“When people understand the “why”, they become partners in building the future instead of protecting the past.”



DEB'S TIP

Your first meeting is not about redesigning work. It's about creating trust.

If your team believes this conversation is about reducing jobs, you've already lost the opportunity.

If they believe it's about helping them become more successful, you've already won.

“People don’t resist support. They resist uncertainty.”

Leadership Discussion

Before introducing the Growth Infrastructure Blueprint™, answer the following questions for yourself.

1. Why are we having this conversation now?

2. What opportunities will this create for our team?

3. What concerns might people have about today’s discussion?

4. How can we clearly communicate that this process is designed to support—not replace—our team?

Leadership Reflection

Complete this sentence before moving to Step Two.

Growth will become easier when...

STEP ONE WORKSHEET

Creating Our Leadership Message



Before we begin redesigning work, we need to explain why we're doing it. Complete the statements below as a leadership team.

Why are we investing in our infrastructure?

Complete This Sentence

"Our goal isn't to replace anyone. Our goal is to..."

What do we want every employee to feel after this meeting?

- | | |
|------------------------------------|------------------------------------|
| ☐ Supported | ☐ Curious |
| ☐ Valued | ☐ Empowered |
| ☐ Excited | ☐ Other |

What do we hope our team spends MORE time doing?

Examples:

- | | |
|---|---|
| ☐ Building relationships | ☐ Marketing |
| ☐ Coaching caregivers | ☐ Leadership |
| ☐ Recruiting | ☐ Strategic planning |
| ☐ Supporting clients | ☐ Other |

STEP ONE WORKSHEET

Our Leadership Promise



Our Leadership Promise

As leaders, we commit to building an organization where our people spend more time doing work that:

- | | |
|---|---|
| ☐ Creates value | ☐ Develops leaders |
| ☐ Uses their strengths | ☐ Supports growth |
| ☐ Helps clients | |

Our Biggest Insight

What was the most important realization from today's discussion?

CEO – Action Items

Before Moving to Step Two

- ☐ We agree on why we're doing this.
- ☐ We have a consistent leadership message.
- ☐ We are prepared to answer employee concerns.

TASKS

Person Responsible _____

Completion Date _____

Blueprint Builder™

Before moving to the next step, ask:

“Have we earned the right to move on?”

- ☐ If the answer is NO, stay here.
- ☐ If the answer is YES, continue.

Notes

The Thinking Behind This Step

One of the biggest mistakes leaders make is trying to redesign an organization by themselves.

The people closest to the work often have the clearest understanding of where time is being lost, where processes break down, and where opportunities exist.

Your role as the leader isn't to have all the answers. Your role is to bring the right people together to discover them.

Every department experiences the organization differently.

- Your scheduler sees staffing challenges.
- Your recruiter sees hiring bottlenecks.
- Your client care team sees service issues.
- Finance sees administrative inefficiencies.
- Marketing sees growth opportunities.

No one person sees the whole picture. But together...they do.

The purpose of this step is to create a shared understanding of how work flows through your organization today before designing how it should work tomorrow.



DEB'S TIP

One of the greatest surprises during this exercise is how often leaders say: "I had no idea that's what your day looked like."

That single statement creates empathy.
And empathy creates collaboration.

The goal isn't simply to understand work. **It's to understand one another.**

LEADERSHIP CONVERSATION

Before beginning today's exercise, discuss these questions together.



Why is it important to hear from multiple departments instead of just leadership?

Where do departments naturally work together today?

Where do handoffs create frustration or delays?

What do you hope to learn from one another today?

Pause & Reflect

Complete this sentence together.

The greatest opportunity we'll gain by bringing the right people together is...

Building the Right Leadership Team



Check everyone participating in today's Blueprint Meeting.

- | | |
|--|---|
| ☐ Owner / Executive | ☐ HR |
| ☐ Director Operations | ☐ Finance |
| ☐ Scheduler | ☐ Marketing |
| ☐ Recruiter | ☐ Intake / Sales |
| ☐ Client Care Manager | ☐ Other |

Is there anyone whose perspective would strengthen today's discussion?

Team Member

What They Understand Best

[illegible]

STEP TWO WORKSHEET

Team Expectations & Next Moves



Team Expectations

As a group, what do we want everyone to feel comfortable doing today?

- | | |
|--|---|
| ☐ Speaking honestly | ☐ Offering ideas |
| ☐ Asking questions | ☐ Thinking creatively |
| ☐ Challenging processes | ☐ Focusing on solutions |
| ☐ Sharing frustrations | ☐ Supporting one another |

Our Biggest Breakthrough

What was the most valuable realization from this discussion?

Our Next Moves

Before moving to Step Three...

- ☐ We have the right people involved.
- ☐ Everyone understands today's purpose.
- ☐ Every participant has a voice.
- ☐ We are focused on improving the organization—not evaluating people.

Meeting Facilitator

Date Completed

Blueprint Builder™

Before moving to Step Three, ask the room:

“Do we have the right people in the room to see the whole organization—not just our own department?”

- ☐ Yes — Continue to Step Three
- ☐ No — Invite additional perspectives before moving forward

The Thinking Behind This Step

One of the biggest mistakes organizations make is defining people by the tasks they perform instead of the value they create.

Over time, talented people naturally accumulate responsibilities. Every new project, every extra report, every administrative task gets added to their plate until it becomes difficult to distinguish what they were hired to do from everything they've picked up along the way.

Before we begin discussing work, we need to reconnect with something more important:

What makes each person uniquely valuable?

Think about your scheduler – were they hired because they're great at entering data? Probably not.

They were hired because they stay calm during staffing crises, build trust with caregivers, and solve problems that others cannot. The same is true for every leader around the table.

The purpose of this step is to identify each person's greatest strengths before discussing the work that surrounds those strengths.

**“Organizations don't grow by protecting tasks.
They grow by protecting talent.”**



DEB'S TIP

One of the biggest surprises during this conversation is how quickly people stop talking about paperwork.

Instead...they begin talking about people: Relationships, Leadership, Coaching, Problem solving & Innovation.

That's because great employees don't define themselves by the work they process. They define themselves by the impact they create. **As a leader...that's exactly what you're trying to protect.**

LEADERSHIP CONVERSATION

Take turns answering the following questions.



What do you believe you do better than anyone else in the organization?

What part of your job gives you the most energy?

When do you feel like you're making your greatest contribution?

If you had two additional hours every day, where would you invest them?

Pause & Reflect

Complete this sentence.

Our greatest organizational strength isn't our processes... It's...

STEP THREE WORKSHEET

Discovering Our Greatest Strengths



Complete this page individually before discussing your answers as a group.

Team Member

My Greatest Strengths

What do I naturally do well?

- | | |
|---|---|
| ☐ Building relationships | ☐ Organization |
| ☐ Coaching others | ☐ Communication |
| ☐ Solving problems | ☐ Recruiting |
| ☐ Scheduling | ☐ Customer Service |
| ☐ Leadership | ☐ Training |
| ☐ Strategic thinking | ☐ Other |

The Greatest Value I Create

The greatest value I bring to this organization is...

What Gives Me Energy?

The part of my job I enjoy most is...

What Drains My Energy?

The work that keeps me from doing my best is...

If Administrative Work Disappeared Tomorrow...

I would spend more time...

- | | |
|--|---|
| ☐ Coaching caregivers | ☐ Leadership |
| ☐ Building referral relationships | ☐ Strategic planning |
| ☐ Developing staff | ☐ Quality improvement |
| ☐ Recruiting | ☐ Business development |
| ☐ Client Communication | ☐ Other |

STEP THREE WORKSHEET

Highest Value Activities & Next Moves



My Highest Value Activities

List the three things only you should be doing.

1. _____
2. _____
3. _____

Our Biggest Breakthrough

What surprised us most about today's conversation?

Our Next Moves

Before moving to Step Four...

- ☐ Every one identified their greatest strengths.
- ☐ We identified work that creates the most value.
- ☐ We recognized activities that require our experience.
- ☐ We began separating strengths from tasks.

Meeting Facilitator _____

Date Completed _____

Blueprint Builder™

Before moving to Step Four, ask the room:

“Have we clearly identified what each person should be doing more of before we begin discussing everything they’re currently doing?”

- ☐ Yes — Continue to Step Four
- ☐ No — Spend more time identifying strengths.

Blueprint Principle™ Great organizations don't build roles around accumulated tasks. They build organizations around people's greatest strengths.

The Thinking Behind This Step

Every growing organization reaches a point where work quietly begins accumulating:

- A scheduler starts handling payroll questions.
- A recruiter begins managing callouts.
- An office manager takes on marketing tasks.
- An owner jumps in to solve staffing issues.

None of these responsibilities seem significant on their own. But over time, they create something leaders rarely notice...**Invisible work.**

The purpose of this step is to make that invisible work visible. This isn't the time to evaluate whether work should stay or move. It's simply time to document reality. Think of yourself as an architect, surveying a building before beginning a renovation.

You're not changing anything today. You're simply understanding how the organization actually works. When every task becomes visible, opportunities begin revealing themselves naturally.



DEB'S TIP

Most people believe they understand their own workload until they begin writing it down. Then something remarkable happens. The wall fills with sticky notes.

People begin saying: "I forgot I even do that." or "I had no idea you were responsible for all of that." That isn't a staffing problem. It's an awareness breakthrough. **Before you can redesign work...you must see it.**

LEADERSHIP CONVERSATION

As a team, discuss the following before beginning your inventory.



Why is it important to document everything...even the small tasks?

What kinds of work often get overlooked?

Where do interruptions consume the most time?

What surprised you as you started thinking about everything you actually do?

Pause & Reflect

Complete this sentence.

The biggest surprise about our current workload is...

STEP FOUR WORKSHEET

Mapping Our Work



Work individually for 10–15 minutes. Provide a different color sticky note pad for each department; if there are multiple people from one department, they should use the color for their area of operations.

Write every recurring responsibility you perform. Don't judge the task. Don't decide whether it should stay or move. Simply capture reality.

Remember: If you do it...write it down. Organize the sticky notes in this order on the board – create headers. Keep the colors together. See example below.

EXAMPLE

TASK INVENTORY INSTRUCTIONS



Write every recurring responsibility you perform.



Don't judge the task.



Don't decide whether it should stay or move.



Simply capture reality.



REMEMBER:
If you do it...write it down.

EXAMPLES OF TASKS BY DEPARTMENT



Scheduling (Yellow)

Schedule caregivers, manage changes, verify availability



Recruiting (Blue)

Post jobs, screen applicants, conduct interviews



Client Care (Green)

Client check-ins, care plans, family communication



Finance (Pink)

Payroll, invoicing, reconcile accounts



Marketing (Purple)

Social media, community outreach, referral follow-up

ORGANIZE THE STICKY NOTES IN THIS ORDER ON THE BOARD

DAILY RESPONSIBILITIES			WEEKLY RESPONSIBILITIES			MONTHLY RESPONSIBILITIES			UNEXPECTED RESPONSIBILITIES	
Check caregiver availability	Schedule caregiver visits	Answer phone calls	Review caregiver schedules	Team huddle meetings	Address scheduling issues	Create caregiver schedule	Review scheduling metrics	Run schedule reports	Cover open shifts	Handle caregiver emergencies
Confirm schedule changes	Handle last minute changes	Update caregiver notes	Verify visit hours	Update scheduling reports	Check caregiver feedback	Meet with caregivers			Fill in for staff when needed	Solve last minute problems
Review new applications	Screen applicants	Respond to job inquiries	Review applicants	Interview candidates	Update job postings	Analyze hiring results	Attend career fairs		Urgent hiring needs	Onboard new hires quickly
Schedule interviews	Check references	Update applicant status	Team recruiting meeting	Follow up with candidates	Update hiring pipeline	Update hiring process	Monthly recruiting report		Cover open positions	Update job postings urgently
Check in with clients	Review care notes	Follow up on client needs	Team case review	Review new admissions	Follow up on client issues	Care plan reviews	Client satisfaction reviews		Handle client crises	Address family concerns
Coordinate with families	Update care plans	Document client calls	Update client communications	Coordinate care changes	Review care quality	Monthly team meeting	Quality assurance review		Cover client visits	Respond to urgent requests
Process payments	Answer billing questions	Reconcile accounts	Run weekly payroll	Review A/R aging report	Pay bills	Close books	Prepare financial reports		Fix payroll issues	Handle billing disputes
Pay caregivers	Record expenses	Deposit checks	Update financial reports	Check budget	Review weekly expenses	Review budget vs actual	Monthly financial meeting		Address audit requests	Urgent financial requests
Respond to referral inquiries	Post on social media	Update website	Review marketing metrics	Plan weekly social posts	Update referral tracker	Monthly marketing report	Plan monthly marketing strategy		Respond to unexpected inquiries	Manage reputation issues
Community outreach	Send newsletters	Follow up on referrals	Check community events	Review website analytics	Team marketing meeting	Review ROI	Board marketing update		Jump on opportunities	Update communications urgently



Keep sticky notes within your department's color so we can see where work is concentrated.

STEP FOUR WORKSHEET

Capturing Every Responsibility



Daily Responsibilities

(Things you do every day.)

Monthly Responsibilities

(Reporting, meetings, audits, payroll, planning, etc.)

Weekly Responsibilities

(Things you do every week.)

Unexpected Responsibilities

(Interruptions, emergencies, "while I've got you" requests, troubleshooting, covering for others, etc.)

STEP FOUR WORKSHEET

Time, Value & Next Moves



Which Responsibilities Consume the Most Time?

List the top five.

1. _____
2. _____
3. _____
4. _____
5. _____

Which Responsibilities Create the Greatest Value?

Circle or list the three activities that truly require your experience and expertise.

1. _____
2. _____
3. _____

Our Biggest Breakthrough

After completing the Task Inventory, what surprised the team the most?

Our Next Moves

Before moving to Step Five...

- ☐ Every recurring responsibility has been documented.
- ☐ We resisted the temptation to redesign work too early.
- ☐ We focused on understanding—not solving.
- ☐ We captured reality as it exists today.

Meeting Facilitator _____

Date Completed _____

Blueprint Builder™

Before moving to Step Five, ask the room:

“If someone walked into our office tomorrow, would this inventory accurately represent how work really flows through our organization?”

- ☐ Yes — Continue to Step Five.
- ☐ No — Spend more time documenting the work.

Blueprint Principle™ Invisible work creates invisible barriers to growth. The first step toward redesigning work is making it visible.

The Thinking Behind This Step

Now that every recurring responsibility is visible, it's time to ask a different question: Which of these tasks truly require the person currently performing them?

This is where many organizations discover that talented leaders have quietly become bottlenecks – not because they lack capability, but because they've become the default owner of too many responsibilities.

Some tasks require experience. Some require authority. Some require relationships. But many simply require consistency.

The purpose of this step is to separate work that **must stay** from work that **could move**.

Remember...you're not deciding where the work goes yet. You're simply identifying opportunities.

Don't ask... "Who can we take work away from?"

Ask... "Where are we preventing our best people from doing their best work?"

That's the leadership mindset.



DEB'S TIP

This step isn't about delegation. It's about capacity.

One of the biggest leadership mistakes is believing that because someone can do something, they should continue doing it.

Ask yourself:

"Is this the highest and best use of this person's time?"

That single question has changed the way I look at leadership.

LEADERSHIP CONVERSATION

As you review your Task Inventory together, discuss these questions.



Which responsibilities absolutely require leadership judgment or authority?

Which responsibilities require expertise—but not necessarily your expertise?

Where do interruptions repeatedly break your focus?

If you could remove only three recurring responsibilities from your plate, which would create the greatest impact?

Pause & Reflect

Complete this sentence.

The greatest bottleneck limiting our growth today is...

STEP FIVE WORKSHEET

Identifying Our Bottlenecks



Review the sticky notes created during the Task Inventory. For each responsibility, decide whether it belongs in one of the following categories. Use the dot sheets to classify the tasks as outlined below:

● **Must Stay with Current Role**

Requires:

- ☐ Leadership judgment
- ☐ Strategic decision-making
- ☐ Clinical expertise
- ☐ Relationship ownership
- ☐ Legal or financial authority

Notes:

● **Streamlined with Process or Automation**

Could be improved with a more efficient process and/or technology, systems, or AI.

Notes:

● **Opportunity to Delegate**

Could eventually move to another team member, a virtual assistant or future position:

- ☐ Another Team Member
- ☐ Technology / Automation
- ☐ Another Team Member
- ☐ Future Position

Notes:

STEP FIVE WORKSHEET

Example: Identifying Our Bottlenecks



STEP 5: IDENTIFYING OUR BOTTLENECKS

Review the sticky notes from your **Task Inventory (Step 4)**.

For each responsibility, decide whether it **must stay** with the current role, could be streamlined with process or automation, or is an opportunity to delegate using dot sheets.

Same Work. A Smarter Way.

Not everything needs your time.

Identify what to keep, streamline or delegate so you can focus on what drives growth.

DAILY RESPONSIBILITIES			WEEKLY RESPONSIBILITIES			MONTHLY RESPONSIBILITIES			UNEXPECTED RESPONSIBILITIES	
Check caregiver availability	Schedule caregiver visits	Answer phone calls	Review caregiver schedules	Team huddle meetings	Address scheduling issues	Create caregiver schedule	Review scheduling metrics	Run schedule reports	Cover open shifts	Handle caregiver emergencies
Confirm schedule changes	Handle last minute changes	Update caregiver notes	Verify visit hours	Update scheduling reports	Check caregiver feedback	Meet with caregivers			Fill in for staff when needed	Solve last minute problems
Review new applications	Screen applicants	Respond to job inquiries	Review applicants	Interview candidates	Update job postings	Analyze hiring results	Attend career fairs		Urgent hiring needs	Onboard new hires quickly
Schedule interviews	Check references	Update applicant status	Team recruiting meeting	Follow up with candidates	Update hiring pipeline	Update hiring process	Monthly recruiting report		Cover open positions	Update job postings urgently
Check in with clients	Review care notes	Follow up on client needs	Team case review	Review new admissions	Follow up on client issues	Care plan reviews	Client satisfaction reviews		Handle client crises	Address family concerns
Coordinate with families	Update care plans	Document client calls	Update client communications	Coordinate care changes	Review care quality	Monthly team meeting	Quality assurance review		Cover client visits	Respond to urgent requests
Process payments	Answer billing questions	Reconcile accounts	Run weekly payroll	Review A/R aging report	Pay bills	Close books	Prepare financial reports		Fix payroll issues	Handle billing disputes
Pay caregivers	Record expenses	Deposit checks	Update financial reports	Check budget	Review weekly expenses	Review budget vs actual	Monthly financial meeting		Address audit requests	Urgent financial requests
Respond to referral inquiries	Post on social media	Update website	Review marketing metrics	Plan weekly social posts	Update referral tracker	Monthly marketing report	Plan monthly marketing strategy		Respond to unexpected inquiries	Manage reputation issues
Community outreach	Send newsletters	Follow up on referrals	Check community events	Review website analytics	Team marketing meeting	Review ROI	Board marketing update		Jump on opportunities	Update communications urgently



MUST STAY WITH CURRENT ROLE

Requires leadership judgment, clinical expertise, or strategic oversight.



COULD STREAMLINE WITH PROCESS OR AUTOMATION

Could be improved with a more efficient process and/or technology, systems, or AI.



OPPORTUNITY TO DELEGATE

Could eventually move to another team member, a virtual assistant, or a future position.



GOAL: Identify work that must stay with you, work that could be streamlined, and work that could be delegated or moved.



This creates capacity. Capacity creates growth.

STEP FIVE WORKSHEET

Our Top 10 Opportunity List



Write the ten responsibilities that create the greatest opportunity to reclaim leadership capacity.

Our Biggest Breakthrough

What realization changed the way we think about our workload?

Our Next Moves

Before moving to Step Six...

- ☐ We identified our biggest bottlenecks.
- ☐ We resisted solving everything today.
- ☐ We focused on work—not people.
- ☐ We identified our highest value delegation opportunities.

Meeting Facilitator

Date Completed

Responsibility	Current Owner	Potential Future Owner

Blueprint Principle™ Growth doesn't stall because talented people become less capable. It stalls because too much important work flows through too few people.

Blueprint Builder™

Before moving to Step Six, ask the room:

“Have we identified the work that’s limiting growth—not just the people who are busy?”

- ☐ Yes — Continue to Step Six.
- ☐ No — Spend more time reviewing the task inventory.

The Thinking Behind This Step

You've identified your bottlenecks. Now it's time to organize them.

One of the biggest mistakes organizations make is trying to solve every problem immediately, because the solution is intentionally unknown at this point. Some work may move to:

- Better systems.
- Cross-training.
- Automation.
- A virtual assistant.
- A new role.

Or it may stay exactly where it is.

Step back. Look for patterns. When similar responsibilities begin clustering together, something remarkable happens. You stop seeing individual tasks.

You begin seeing **future roles**. Twenty scheduling-related sticky notes don't represent twenty separate problems. They represent one opportunity. Fifteen recruiting responsibilities don't represent fifteen frustrations. They represent another opportunity.

The purpose of the **Opportunity Board™** is to group related work into meaningful categories so the organization can begin redesigning work intentionally instead of reacting to it. This is where hidden growth becomes visible.



DEB'S TIP

This is my favorite part of the Blueprint, because this is where leaders stop talking about people...and start talking about systems.

Instead of asking...
“Who can help me?”

You begin asking...
“What kind of support does this organization actually need?”

That's a transformational leadership question.

LEADERSHIP CONVERSATION

As you begin moving sticky notes into categories, discuss these questions.



Which responsibilities naturally belong together?

What patterns are beginning to emerge?

Which departments appear overloaded?

Which categories represent the greatest opportunity to increase capacity?

Pause & Reflect

Complete this sentence.

The biggest opportunity we discovered today is...

STEP SIX WORKSHEET

Building Our Opportunity Board™



Now organize the sticky notes that have either a yellow or green dot into logical categories defined by color, representing the different departments. Don't worry about job titles. Simply group similar work together that can either be shared (yellow) or moved (green). See example below:

EXAMPLE

STEP 6: BUILD THE OPPORTUNITY BOARD

Now that you've identified work that could be streamlined or delegated (yellow and green dots), organize similar tasks into logical categories. This will help you see patterns and decide what to do next.

DOT KEY (from Step 5)

● Could Streamline with Process or Automation

● Opportunity to Delegate

SCHEDULING	RECRUITING	CAREGIVER SUPPORT	CLIENT CARE	INTAKE & SALES	FINANCE	HR	MARKETING	OPERATIONS	EXECUTIVE SUPPORT
SCHEDULE MANAGEMENT	APPLICANT MANAGEMENT	CAREGIVER RECORDS	CLIENT COMMUNICATION	LEAD MANAGEMENT	PAYROLL & TIMEKEEPING	EMPLOYEE MANAGEMENT	CONTENT & SOCIAL MEDIA	PROCESS & SYSTEMS	ADMINISTRATIVE SUPPORT
Update schedule (changes) ●	Screen applicants ●	Update caregiver records ●	Enter visit notes ●	Enter inquiry calls ●	Return timesheets ●	New hire onboarding checklists ●	Social media posting ●	Process improvement ●	Calendar management ●
Handle last minute changes ●	Post jobs on job boards ●	Manage caregiver file updates ●	Care plan reminders ●	Schedule assessments ●	Approve payroll ●	Update employee files ●	Create content ●	Prepare meeting agendas ●	Travel arrangements ●
Send schedule updates ●	Update applicant status ●	Order caregiver ID badges ●	Client check-ins ●	Enter leads in CRM ●	Process payroll runs ●		Newsletter assembly ●	Document processes ●	Prepare presentations ●
	Schedule interviews ●		Follow up on client needs ●	Update lead status ●	Update docs to payors ●	TRAINING & DEVELOPMENT	Update website content ●	Update procedure manuals ●	Compile reports ●
CAREGIVER COMMUNICATION	New hire reminders ●	COMMUNICATION & ENGAGEMENT	Document client calls ●	Prepare welcome packets ●	BILLING & ACCOUNTS	Schedule orientation ●	Track campaign results ●	Coordinate vendor services ●	Manage inbox ●
Check caregiver availability ●	Check references ●	Answer caregiver phone calls ●		Send follow-up information ●	Process payments ●	Track training records ●	Community partnership meetings ●	Create standard reports ●	Track action items ●
Answer phone calls ●		Route calls to care managers ●	CARE PLAN MANAGEMENT	Data entry for referrals ●	Answer billing questions ●	Send policy reminders ●	Review marketing metrics ●	MEETINGS & REPORTING	Research projects ●
SHIFT MANAGEMENT	OUTREACH & FOLLOW-UP	Track training compliance ●	Update care plans ●	Track referral sources ●	Reconcile accounts ●		Plan weekly social posts ●	Team meetings ●	Event logistics ●
Confirm schedule changes ●	Respond to job inquiries ●	Caregiver appreciation outreach ●	Care plan reviews ●		Record expenses ●	ENGAGEMENT & COMPLIANCE	Review website analytics ●	Client satisfaction reviews ●	Update communications urgently ●
Enter time off requests ●	Send follow-up emails ●	Send caregiver text alerts ●	Client satisfaction surveys ●		Deposit checks ●	Employee relations ●		Quality assurance review ●	
Confirm shift coverage ●			File document updates ●		REPORTING	Benefits questions (admin) ●		Board marketing update ●	
					Update financial reports ●				
					Check budget ●				
					Review weekly expenses ●				



Seeing your opportunities in one place makes it easier to decide what to automate, delegate, or move — and creates capacity for growth.



Less busy work.
More growth work.

STEP SIX WORKSHEET

Reading the Board



Which Category Has the Most Sticky Notes?

Category	Estimated Number of Tasks

Which Category Creates the Greatest Bottleneck?

Why?

Top Three Opportunities

1. _____

Why? _____

2. _____

Why? _____

3. _____

Why? _____

STEP SIX WORKSHEET

Looking Ahead & Next Moves



Looking Ahead...

Without deciding how you'll solve it... which support model might eventually help each category?

Opportunity	Possible Solution
Scheduling	_____
Recruiting	_____
Finance	_____
Marketing	_____
Client Care	_____
Administration	_____

(Possible solutions may include technology, automation, cross-training, virtual assistants, role redesign, or future hires.)

Our Biggest Breakthrough

What pattern surprised us the most?

Our Next Moves

Before moving to Step Seven...

- ☐ Our sticky notes have been grouped into logical categories.
- ☐ We identified our three biggest opportunities.
- ☐ We focused on organizational needs—not individual workloads.
- ☐ We began seeing future roles emerge.

Meeting Facilitator _____

Date Completed _____

Blueprint Builder™

Before moving to Step Seven, ask the room:

“If we were building this organization from scratch today, would we organize the work the same way?”

- ☐ Yes — Continue to Step Seven.
- ☐ No — Continue refining the Opportunity Board.

Blueprint Principle™ The future of your organization isn't hidden in job descriptions. It's hidden in the patterns of the work.

The Thinking Behind This Step

Many organizations make hiring decisions before they fully understand the work that needs to be done.

As a result, new employees often inherit a collection of unrelated responsibilities that have accumulated over time. That's how organizations unintentionally create overloaded roles, unclear expectations, and frustrated employees.

The **Opportunity Board™** changes that. Instead of starting with job titles...you begin with the work itself. When similar responsibilities naturally cluster together, future roles begin to emerge.

Some opportunities may justify a full-time position. Others may be shared across departments. Some may be better supported through automation, improved systems, cross-training, or virtual support.

The goal isn't to fill positions. The goal is to build an organization where every role has a clear purpose and every team member spends more time creating value.

You're no longer asking... "Who should we hire?"

You're asking... "What role does our organization actually need?"

That is strategic organizational design.



DEB'S TIP

One of the biggest mistakes I made early in my career was hiring people before defining success.

Now we do the opposite. We define the work. Then we design the role. Then we find the right person.

That simple shift has transformed the way we build our organization.

LEADERSHIP CONVERSATION

Discuss the Opportunity Board™ together.



Which opportunities naturally belong together?

Which opportunities could become a dedicated role?

Which opportunities could remain shared?

Which opportunities could be supported by technology, automation, or virtual assistants?

Pause & Reflect

Complete this sentence.

The role our organization needs most over the next twelve months is...

STEP SEVEN WORKSHEET

Designing Future Roles



EXAMPLE

STEP 7: DESIGNING FUTURE ROLES

Turn Opportunities into a Stronger Team.

Same Work. A Smarter Way.

Right work. Right role. More capacity. More growth.

Based on the opportunities identified in Step 6, group similar tasks into future roles, team members, or automation solutions that will support your growth.

									
SCHEDULING	RECRUITING	CAREGIVER SUPPORT	CLIENT CARE	INTAKE & SALES	FINANCE	HR	MARKETING	OPERATIONS	EXECUTIVE SUPPORT
FUTURE ROLE(S)	FUTURE ROLE(S)	FUTURE ROLE(S)	FUTURE ROLE(S)	FUTURE ROLE(S)	FUTURE ROLE(S)	FUTURE ROLE(S)	FUTURE ROLE(S)	FUTURE ROLE(S)	FUTURE ROLE(S)
Scheduling Coordinator	Recruiting Coordinator	Caregiver Support Coordinator	Client Care Coordinator	Lead & Referral Coordinator	Billing & Accounts Coordinator	HR Coordinator	Marketing Coordinator	Operations Coordinator	Executive Assistant
KEY RESPONSIBILITIES	KEY RESPONSIBILITIES	KEY RESPONSIBILITIES	KEY RESPONSIBILITIES	KEY RESPONSIBILITIES	KEY RESPONSIBILITIES	KEY RESPONSIBILITIES	KEY RESPONSIBILITIES	KEY RESPONSIBILITIES	KEY RESPONSIBILITIES
- Check caregiver availability - Update schedules - Handle last minute changes - Send schedule updates - Confirm shift coverage - Enter time off requests	- Screen applicants - Post jobs on job boards - Update applicant status - Schedule interviews - Send follow-up emails - Check references - Respond to job inquiries	- Update caregiver records - Manage caregiver file updates - Order caregiver ID badges - Answer caregiver phone calls - Route calls to care managers - Track training compliance - Send caregiver text alerts	- Enter visit notes - Care plan reminders - Client check-ins - Follow up on client needs - Document client calls - Update care plans - Care plan reviews - Client satisfaction surveys - File document updates	- Enter inquiry calls - Schedule assessments - Enter leads in CRM - Update lead status - Prepare welcome packets - Send follow-up information - Data entry for referrals - Track referral sources	- Process payroll runs - Process payments - Answer billing questions - Reconcile accounts - Record expenses - Deposit checks - Update financial reports - Check budget - Review weekly expenses	- New hire onboarding checklists - Update employee files Training & Compliance Coordinator - Schedule orientation - Track training records - Send policy reminders - Benefits questions (admin) - Employee relations support	- Social media posting - Create content - Newsletter assembly - Update website content - Track campaign results - Community partnership meetings - Review marketing metrics - Plan weekly social posts - Review website analytics	- Process improvement - Prepare meeting agendas - Document processes - Update procedure manuals - Coordinate vendor services - Create standard reports - Team meetings - Client satisfaction reviews - Quality assurance review - Board marketing update	- Calendar management - Travel arrangements - Prepare presentations - Compile reports - Manage inbox - Track action items - Research projects - Event logistics - Update communications urgently
IMPACT	IMPACT	IMPACT	IMPACT	IMPACT	IMPACT	IMPACT	IMPACT	IMPACT	IMPACT
Frees up leadership time, improves response time and coverage.	Builds a consistent pipeline and speeds up time to hire.	Improves caregiver experience and reduces administrative burden.	Enhances communication and client satisfaction, keeping clients engaged and safe.	Faster follow-up, more conversions, stronger referral relationships.	Improves accuracy, speeds up processes and keeps financials on track.	Keeps team members supported, compliant and engaged.	Keeps your brand visible, consistent and top of mind in the community.	Drives consistency, accountability and efficiency across the agency.	Frees up leadership time to focus on strategy, relationships and growth.



The right roles create capacity. Capacity creates growth.



From bottlenecks to a stronger, more scalable team.

STEP SEVEN WORKSHEET

Next Moves



Our Next Moves

Before moving to Step Eight...

- ☐ We designed roles around the work.
- ☐ We focused on organizational needs rather than individual preferences.
- ☐ We avoided designing around today's organizational chart.
- ☐ We identified the best support model for each opportunity.

Meeting Facilitator _____

Date Completed _____

Notes

Blueprint Builder™

Before moving to Step Eight, ask the room:

“If we were building this organization from scratch today, would we create these same roles—or are we simply protecting yesterday's structure?”

- ☐ Yes — Continue to Step Eight.
- ☐ No — Revisit the Opportunity Board™ and redesign the work.

Blueprint Principle™ Organizations don't become stronger by adding more people. They become stronger by designing better roles around the work that matters most.

Roles We Want to Design First

The Thinking Behind This Step

Even the best organizational design will fail if your team doesn't understand how it benefits them.

Leaders often communicate what is changing. Exceptional leaders communicate why it matters to each person.

Every employee naturally asks one question during times of change: **“What does this mean for me?”** That's not selfish. It's human.

The **Growth Infrastructure Blueprint™** is not about asking people to do more. It's about helping them spend more time doing the work they were hired and inspired to do:

- Schedulers should spend more time supporting clients and caregivers.
- Recruiters should spend more time recruiting excellent caregivers.
- Marketing professionals should spend more time building relationships.
- Leaders should spend more time leading.

When people understand that the Blueprint isn't taking value away from them, but helping them create more value, they become partners in the journey instead of resisting the process.

The goal of this step is commitment.



DEB'S TIP

I've learned something over the years. People rarely become excited about organizational charts. They become excited about having more time to succeed.

Don't sell the process. Sell the future. Help people imagine what their day will look like when they're doing more meaningful work and less repetitive work.

That's the conversation they'll remember.

LEADERSHIP CONVERSATION

Discuss these questions as a team.



How will this redesign make each department more successful?

Which frustrations are we eliminating?

What exciting opportunities will this create?

How will our clients, caregivers, and employees benefit?

Pause & Reflect

Complete this sentence.

If we communicate this well, our team will begin to see...

STEP EIGHT WORKSHEET

Building Our Communication Plan



Every department should clearly understand how this redesign benefits them. Complete the table below together.

Department	Today's Challenge	Tomorrow's Opportunity
Scheduling		
Recruiting		
Client Care		
Finance		
Marketing		
Leadership		

Our Leadership Message

Complete this sentence together.
“We’re making these changes because...”

Complete These Statements

Because of this Blueprint...

Our clients will experience...

Our caregivers will experience...

Our office team will experience...

Our leaders will experience...

STEP EIGHT WORKSHEET

Preparing for Questions & Next Moves



Preparing for Questions

What questions or concerns might employees have?

Question

Our Response

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Our Biggest Breakthrough

What message do we want every employee to remember after hearing about this initiative?

Our Next Moves

Before moving to Step Nine...

- ☐ We can clearly explain why we're making these changes.
- ☐ We anticipated questions before launching.
- ☐ Every department understands what's in it for them.
- ☐ Our communication focuses on opportunity, not uncertainty.

Meeting Facilitator

Date Completed

Blueprint Builder™

Before moving to Step Nine, ask the room:

"If I were hearing about this change for the first time, would I leave feeling excited—or anxious?"

- ☐ Excited — Continue to Step Nine.
- ☐ Uncertain — Strengthen your communication before moving forward.

Blueprint Principle™ People don't commit because they understand the plan. They commit because they understand their place in the future the plan creates.

The Thinking Behind This Step

A great conversation doesn't change an organization. Action does.

By now, you've identified strengths, uncovered bottlenecks, organized opportunities, and begun designing future roles. You've done the hard work. Now it's time to decide what happens next.

One of the biggest mistakes organizations make is trying to solve everything at once. The **Growth Infrastructure Blueprint™** takes a different approach...

Instead of asking, "How do we fix everything?"

Ask, "What's the next best step?"

Small, intentional improvements build momentum. Momentum builds confidence. Confidence builds culture. Culture drives sustainable growth.

Your roadmap isn't about creating a perfect plan. It's about creating forward movement.

**The goal isn't to leave this meeting with every answer.
The goal is to leave with absolute clarity about your
next steps.**



DEB'S TIP

The best plans don't sit on shelves. They become part of weekly leadership conversations.

I've learned that momentum is far more important than perfection. Celebrate progress. Adjust often. Keep moving.

Organizations that improve a little every month eventually outperform organizations waiting for the perfect time to change.

LEADERSHIP CONVERSATION

Before finalizing your roadmap, discuss these questions together.



Which opportunities will create the greatest impact over the next 30 days?

What work should wait until later?

What resources or support will we need?

How will we know we're making progress?

Pause & Reflect

Complete this sentence.

Six months from now, we'll know this Blueprint was successful because...

STEP NINE WORKSHEET

Building Our Growth Roadmap



Use everything you've learned throughout the Blueprint to build your implementation plan.

NEXT 30 DAYS

Quick Wins

What can we accomplish immediately?

- ☐ Process improvements
- ☐ Better communication
- ☐ Task redistribution
- ☐ Automation opportunities
- ☐ Cross-training
- ☐ Other

Our Top Priorities

1. _____
2. _____
3. _____

NEXT 90 DAYS

Building Infrastructure

What larger improvements should we begin?

- ☐ Role redesign
- ☐ Technology upgrades
- ☐ Virtual Assistant support
- ☐ New leadership routines
- ☐ Documentation
- ☐ Workflow improvements
- ☐ Other

Top Priorities

1. _____
2. _____
3. _____

NEXT 6–12 MONTHS

Scaling What Works

What should become part of our long-term growth strategy?

- ☐ Leadership development
- ☐ Organizational expansion
- ☐ Standardized systems
- ☐ Additional support roles
- ☐ Performance dashboards
- ☐ Continuous improvement
- ☐ Other

Big Goals

1. _____
2. _____
3. _____

STEP NINE WORKSHEET

Success Measures & Next Moves



Success Measures

How will we know the Blueprint is working? Choose 4–6 measurable outcomes.

- | | |
|---|--|
| ☐ Leadership time reclaimed | ☐ Faster response times |
| ☐ Reduced overtime | ☐ Increased admissions |
| ☐ Faster hiring | ☐ Employee engagement |
| ☐ Improved caregiver retention | ☐ Revenue growth |
| ☐ Better client satisfaction | ☐ Increased referrals |
| ☐ Other _____ | |

Our Biggest Breakthrough

Looking back across all nine steps...what is the single most important realization we had?

Our Next Moves

Within the next seven days...

- ☐ Schedule our first follow-up meeting.
- ☐ Celebrate one immediate win.
- ☐ Share our roadmap with the leadership team.
- ☐ Begin implementing our first improvement.
- ☐ Assign accountability for each initiative.

Our First Leadership Review

Date _____

Facilitator _____

Blueprint Builder™

Before closing today's session, ask the room:

"If we accomplished only the first three priorities on this roadmap, would our organization be stronger than it is today?"

- ☐ Yes — Begin implementation.
- ☐ No — Refine your priorities until the answer is yes.

Blueprint Principle™ Growth isn't created by one big decision. It's created by hundreds of intentional improvements that compound over time.

CLOSING MESSAGE

Your Next Step: Turning Your Growth Roadmap into Reality



Congratulations!

Today, you didn't simply complete an exercise. You stepped back from the daily demands of running your agency and began designing the organization you want to become.

The **Growth Infrastructure Blueprint™** is about helping your people spend more time doing the work that matters most.

As your organization grows, revisit these nine steps regularly. Each time you do, you'll uncover new opportunities, strengthen your infrastructure, and create additional capacity for the next stage of growth.

Remember...Organizations don't outgrow their potential. **They outgrow their infrastructure.** Build the infrastructure...and you'll build the future.

Debbie Miller

You've Done the Hard Part.

By completing the **Growth Infrastructure Blueprint™**, you've accomplished something most agency owners never do. You stepped away from the daily demands of running your business and intentionally redesigned how work should flow through your organization.

How will you build the infrastructure you've identified?

There isn't one right answer. Some opportunities may be solved through:

- | | |
|---|--|
| ☐ Better systems | ☐ Technology |
| ☐ Process improvements | ☐ New leadership routines |
| ☐ Cross-training | ☐ Hiring a new employee |
| ☐ Automation | ☐ Adding virtual support |

The important thing is this...

The work should determine the solution—not the other way around.

WHY MORE AGENCIES ARE CHOOSING VIRTUAL SUPPORT

Introducing Helper Heroes™—Infrastructure Support Designed Specifically for Home Care



Many of the responsibilities identified during the Blueprint don't require another full-time office employee. They require **consistent ownership**.

Tasks like:

- Recruiting support
- Scheduling assistance
- Caregiver follow-up
- Lead management
- Billing and payroll support
- Administrative projects
- Marketing coordination
- Executive assistance

...can often be performed by highly trained virtual professionals, allowing your on-site leaders to spend more time doing the work that creates the greatest value.

Remember... The goal isn't replacing people. It's helping your best people spend more time doing what only they can do.

Unlike traditional staffing companies, Helper Heroes was built by home care owners who understand how agencies actually operate. Our virtual professionals become an extension of your existing team, helping agencies create stronger infrastructure without immediately adding another full-time office salary.

Common Roles We Support

- | | |
|-----------------------------------|----------------------------|
| ✓ Scheduler | ✓ Administrative Assistant |
| ✓ Recruiter | ✓ Marketing Coordinator |
| ✓ After-Hours On-Call Coordinator | ✓ Executive Assistant |
| ✓ Intake & Lead Manager | ✓ Insurance Verification |
| ✓ Billing & Payroll Support | ✓ CRM & Data Management |

Ready to Build Your Next Level?

If the Growth Infrastructure Blueprint™ helped you identify hidden growth opportunities, we'd love to help you implement them. Schedule a **complimentary Growth Infrastructure Review**.

Together we'll:

- ✓ Review your Opportunity Board™
- ✓ Prioritize your biggest opportunities
- ✓ Help you design the right support model
- ✓ Develop a customized Role Blueprint
- ✓ Determine whether virtual support, automation, role redesign, or another solution is the best fit

No pressure. No obligation. Just practical guidance to help you build the infrastructure your agency needs to grow.





The Helper Heroes Implementation Process

Simple steps. Powerful support. More time for what only you can do.



WE HANDLE THE SUPPORT. YOU LEAD WITH IMPACT.



Scan QR to schedule a complimentary Growth Infrastructure Review



1.629.256.6829

dylan@52weeksmarketingllc.com

<https://helperheroes.com/>