



CONSULTING PARTNERS • WHITE PAPER

OPERATIONAL SUPPORT FOR SMALL BUSINESS OWNERS

Streamline your business. Build your brand equity.

How bespoke operational support takes the complexity off the owner's desk, and what a 90-day engagement with Know-Howe looks like.

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EXECUTIVE SUMMARY

Growth stalls at the owner's desk

Most small businesses don't plateau because of the market, the competition, or a lack of talent. They plateau because every decision, exception, and fire still routes through the owner.

Owners build their businesses on skill, hustle, and relationships. As the business grows, the work that got them there turns into a second job: managing people, tracking numbers, fixing processes, and settling disagreements. That second job crowds out the work that actually builds brand equity: client and referral relationships, hiring, reputation, and the long-term value of the business.

Know-Howe's bespoke operational support gives the owner a practical system for running the business, installs it alongside the leadership team in about 90 days, and leaves the team able to run it on their own. For self-employed professionals, the same system brings order to the plan, the numbers, and the daily work. We handle the complexity so you can focus on building your brand equity.

In this paper

- Why growing businesses get stuck, and the signs it's happening in yours
- The six-component framework Know-Howe uses to organize a business
- The 16-tool operational toolkit and how each tool is used
- What a 90-day engagement looks like, week by week
- What owners can expect to be different when it's done

THE CHALLENGE

Five signs the business is running you

Business owners describe the same patterns, whatever their industry, size, or market. If two or more of these sound familiar, the problem isn't effort. It's structure.

What it looks like	What's usually underneath
Every question lands on the owner's phone, including on vacation.	No one else clearly owns the job, or the process isn't written down.
The team is busy, but the owner can't say if the month is on track until it's over.	No weekly numbers; results are seen only after the fact.
The same problems come up in every meeting and never go away.	Meetings report and discuss, but don't decide, assign, and follow up.
Good people are frustrated; some are in roles that don't fit them.	Roles were built around people, not around what the business needs.
Partners pull the team in different directions.	No shared plan and no agreed way to break a tie.

Busy and growing are not the same thing. A business grows when the owner's time moves from running the business to building it.

Every industry adds its own pressure: seasonal swings, changing rules, tight margins, and key people who are hard to replace. A business without a clear structure feels every one of those swings at the owner's desk. For self-employed professionals, the owner is the whole team, so the pressure lands even harder.

THE FRAMEWORK

Six components every business runs on

Know-Howe organizes every engagement around six components. Each is simple on its own. Strengthening all six together is what takes the weight off the owner.



Vision. A plan everyone can state: values, focus, and where the business is headed in one, three, and five years.

People. The right person in each role, and every role clearly defined.

Data. A handful of weekly numbers that show trouble before month-end does.

Issues. A habit of naming real problems and solving them permanently.

Process. Core processes written down simply and followed by everyone.

Traction. 90-day priorities and a meeting rhythm that keeps them moving.

Each component is simple on its own. The leverage comes from strengthening all six at once.

The work is practical. Each component comes with fillable tools the owner and team complete together, so the system lives in the business, not in a consultant's binder. If you work on your own, the people pieces shrink and the rest still applies.

THE TOOLKIT

Sixteen tools, one system

Every Know-Howe client receives the full Operational Toolkit as branded, fillable PDFs, along with a training module for each tool.

Component	Tool	What it does
Vision	Business Model Framework	One shared picture of the six components and where the gaps are.
	Vision and Execution Plan	Direction and the plan to get there, on two pages.
	The 5 Rules	Five agreements that keep partners aligned.
People	Team Responsibility Chart	Structure by function and role before names.
	Capability Assessment Review	Rates each person against core values and their role.
	Understand, Desire, Capability Checklist	Three questions that decide if someone fits a role.
	Delegate to Grow	Sorts the owner's work so the right tasks get handed off.
	Quarterly Check-In	An informal quarterly conversation with each direct report.
Data	Company Scorecard	5–15 weekly numbers, each with an owner and a goal.
Issues	Problem Resolution Track	Identify, discuss, and solve issues for good.
Process	3-Step Process Documenter	Identify, document, and package core processes.
Traction	Quarterly Rocks	Company and individual 90-day priorities.
	Performance Sync	The annual, quarterly, and weekly meeting rhythm.
	Leadership High-Level Meeting	A fixed 90-minute weekly agenda built to solve problems.
	Leadership & Management Practices	A 10-point self-check for every manager.
	Focus Reset	Scheduled thinking time to work on the business.

THE ENGAGEMENT

A 90-day installation, tailored to your business

Bespoke means the system is fitted to how your business actually works: your team size, your market, your partners, and your goals. The toolkit is the same for everyone. How it's applied is not.



Working on your own? The same 90 days focus on your plan, your numbers, and your processes, with a lighter People phase.

What Know-Howe handles

- Facilitates every working session with the owner and leadership team
- Prepares the tools in advance and captures the completed versions in your shared folder
- Coaches the leadership meeting live until the team runs it without help
- Reviews the scorecard and 90-day priorities with the owner every two weeks
- Helps document the core processes, from first client contact through delivery, follow-up, and referrals

What your team commits

- Leadership attends the working sessions and the weekly meeting, every week
- The owner of each tool completes it between sessions
- The owner protects time for a regular Focus Reset

THE RESULT

What's different after 90 days

Before	After
Direction lives in the owner's head.	A two-page plan the whole team can state.
Roles grew around people.	Every function has one accountable owner.
Results show up at month-end.	A weekly scorecard flags trouble early.
Issues repeat meeting after meeting.	Issues are solved, assigned, and checked the next week.
Processes live in people's heads.	Core processes are documented and followed.
The owner works in the business.	The owner has time to build the brand.

About Know-Howe

Know-Howe Consulting Partners was founded by James “Jimmy” Howe, who brings more than 25 years in financial services and franchising, much of it spanning the financial and legal fields. He has worked directly with business owners across two franchise systems, including more than 70 mortgage brokerage offices, on operations, business development, compliance, financial performance, and client relations.

Ready to take the complexity off your desk?

Start with a conversation about where your business is today.

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