DesignMax
A Digital Solutions Agency

A GUIDE FOR SMALL BUSINESS OWNERS

A Big Solution for Your Small Business Problem

Get more from the tools you already use,

including Microsoft 365 and Google Workspace.

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Got a small business problem?

DesignMax has a big solution.

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01 / THE OPPORTUNITY

Your next business solution may already be in your toolbox.

You pay for the software. Your team uses it every day. Email, documents, spreadsheets, forms, and shared folders keep your business moving.

But have you put those tools to work together?

With thoughtful development, familiar tools can become the foundation of a business system: one that collects information, organizes records, prepares documents, tracks progress, and helps your team know what comes next.

These are capabilities many owners associate with expensive business software. Depending on your needs and subscriptions, some may be within reach through tools you already have.

At DesignMax, we help you uncover that potential and turn it into something useful for your business.

This guide will help you recognize the opportunities, understand what a connected environment can do, and see how a focused investment could make your working day easier.



Collect



Organize



Prepare



Track

Put the tools you own to work together.

02 / FIT YOUR BUSINESS

The small business advantage.

Get a system that fits how your business actually works, at a scale you can justify.

You know what it takes to run a tight ship. Your team wears several hats, your budget has little room for overlapping subscriptions, and a missed handoff can travel upstream and land right on your desk.

Your business also has specific needs: a particular intake process, a document package, an approval step, or a way of tracking work that you've developed through experience.

Those details matter. They reflect how you serve your customers and keep your business moving. They should help shape your technology.

Built around the way you work

An intentionally developed environment gives you room to address the details that matter to your business.

01 **Start within a defined budget.** Focus on one worthwhile improvement and build on existing tools where they fit.

02 **Make it your own.** Use your terminology, your documents, and your approval steps.

03 **Adjust as your needs change.** Revise a form, update a template, or change who handles the next step.

04 **Grow in stages.** Add workflows, dashboards, and capabilities as the need develops.

05 **Give your team more capacity.** Reduce repetitive work so staff have more time for customers and tasks that require judgment.

06 **Get fewer reminders stuck in your head.** Make responsibilities and next steps visible to the people doing the work.

You already know where work gets stuck. DesignMax helps translate that knowledge into a system your team can use.

03 / SEE THE DIFFERENCE

Work smarter.

Someone completes an intake form. A staff member retypes the details into a spreadsheet, creates a folder, copies a letter, and emails a colleague.

Then comes the missing information, the follow-up, and the question of who handles the next step.

Repeated across a busy week, the handoffs become a second job.

Does this sound like you? What if I told you we could connect those tools through automation?

Picture this: someone submits an intake form, and that submission starts a set of actions. A shared record is created, the right folder is set up, a draft letter is prepared, and the person responsible for the next step receives a notification.

Your team reviews the information, handles exceptions, and makes decisions - with less time spent copying details and chasing updates.

TODAY / MANUAL HANDOFFS

- **Retype the details**
  Copy intake information into a spreadsheet.
- **Create the folder**
  Set up the client documents.
- **Prepare the letter**
  Replace details in an old file.
- **Chase the handoff**
  Email a colleague and check for updates.

CONNECTED / AUTOMATED STEPS

- **Capture once**
  A submission starts a shared record.
- **Organize automatically**
  The workflow creates the client folder.
- **Prepare a draft**
  Collected information fills a template.
- **Notify the right person**
  The next step reaches its owner.

Less copying. Clearer handoffs. More time for clients.

04 / INVEST WITH PURPOSE

Less is more.

Before you buy another application, take a closer look at what you already pay for.

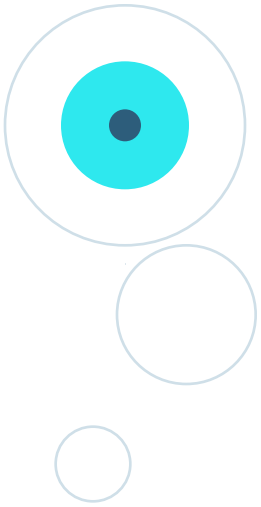
A new subscription can solve an immediate problem. It can also introduce another login, another copy of client information, and another place to check for updates.

Over time, you may find yourself paying for several applications while your staff still moves information between them manually.

That creates two expenses: the cost of the software and the time it takes to keep everything connected.

More power can come from using a smaller set of tools well.

A form connected to a shared record, document templates, and a task notification can remove several manual steps. A dashboard can give your team a clear starting point instead of requiring everyone to search through email and folders.



A simpler working day. A sensible total cost.

05 / THE WHOLE COST

Look beyond the monthly price.

The right comparison includes what it takes to set up, use, and maintain each option.

COST TO CONSIDER	WHAT TO INCLUDE
Software	Subscriptions, add-ons, storage, and usage charges
Implementation	Planning, development, migration, testing, and training
Daily operation	Duplicate entry, searching, corrections, and manual handoffs
Ongoing care	Monitoring, support, administration, and future changes

Developing your existing environment has costs, too. The opportunity is to direct your investment toward capabilities that fit your business while reducing unnecessary overlap.

At DesignMax, we look at the whole workflow to understand where an improvement will make a useful difference.

Keep the software that earns its place

Your accounting package, billing system, or specialized industry application may remain essential.

A connected environment can support the work around it: collecting information, organizing documents, tracking requests, and connecting systems where supported.

The question is practical:

Which combination gives your business the capabilities it needs at a cost it can sustain?

06 / BUILD THE FOUNDATION

Turn everyday tools into a working environment.

Give your team a shared place to find information, do their work, and see what comes next.

Microsoft 365 and Google Workspace are often used primarily for email and documents. With appropriate configuration and development, they can also support shared workspaces, organized records, internal dashboards, and connected workflows.

Think of your environment as the place where work arrives, information lives, and people find their next action.

What your business needs	What a developed environment can provide
A consistent way to collect information	Forms connected to records and follow-up steps
Documents people can find	Shared libraries, useful naming, and organized folders
Less repetitive document preparation	Templates populated with information already collected
Clear ownership of work	Tasks, assignments, notifications, and status tracking
A view of what needs attention	Dashboards showing outstanding work and next actions
Appropriate access	Permissions based on responsibilities and information needs

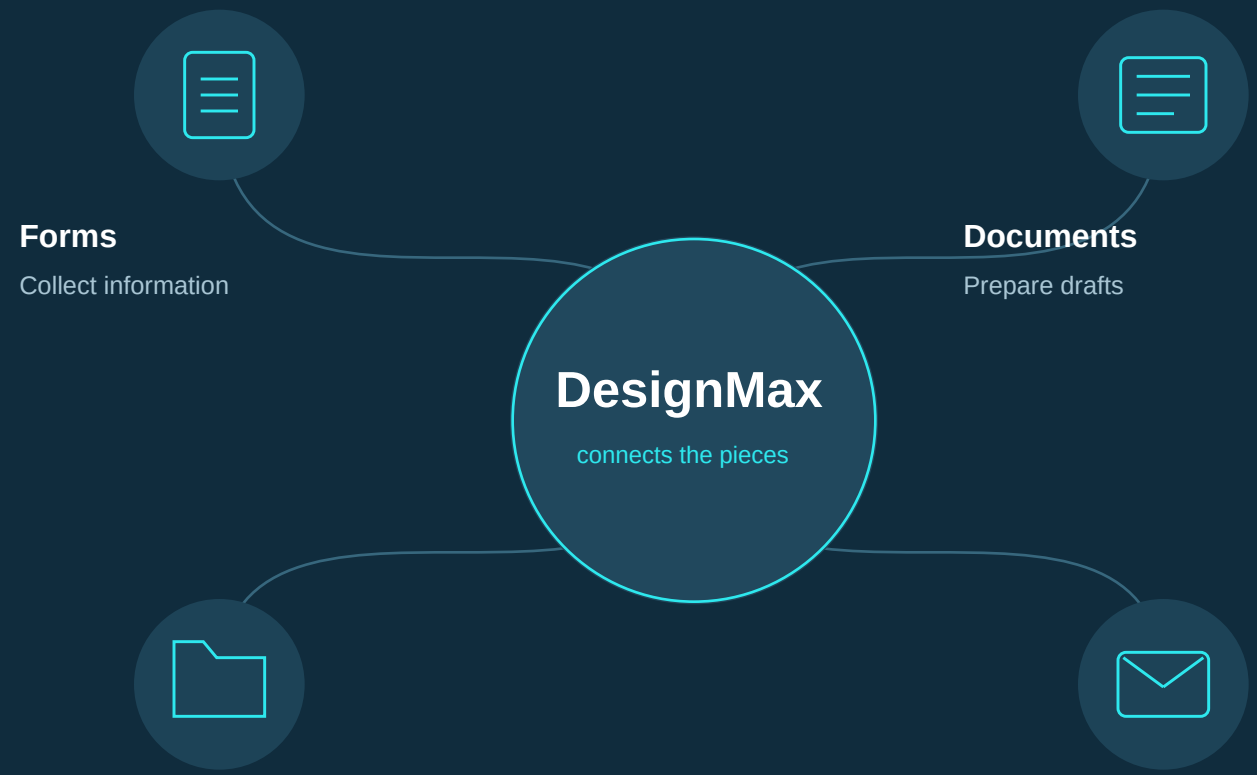
The available features and costs depend on your subscriptions and requirements. Microsoft 365 and Google Workspace offer different building blocks, so the design should reflect the environment you use.

DesignMax brings those pieces together around your operation - from the first form to the final handoff.

07 / HOW THE PIECES CONNECT

Your tools. A connected system.

Develop the environment around the way your business works.



Workflow design • Automation • Permissions • Templates

Organized records

Find what you need.

Visible progress

See what needs attention.

Clear handoffs

Know what comes next.

08 / YOUR BUSINESS

What could this look like in your business?

Start with something your team does repeatedly.

01 Bringing on a new client

Today: Details arrive by email. Someone creates a folder, updates a spreadsheet, prepares documents, and tells the team.

With a connected workflow: A submission can start the record, create the folder, prepare draft documents, and notify the assigned person. Staff review the information before moving forward.

02 Managing service requests

Today: Requests are scattered across messages. You ask who is handling each one and whether anyone has followed up.

With a connected workflow: Requests enter a shared tracker with an assigned person, status, and next action. Your team can see what is open and what needs attention.

03 Preparing recurring documents

Today: Someone opens an old document, replaces the details, and hopes nothing from the previous client was missed.

With a connected workflow: Information from a shared record can populate a standard template. Your team reviews the draft before it is finalized or sent.

04 Keeping the owner informed

Today: Getting an update means interrupting several people or opening multiple files.

With a connected workflow: A dashboard can bring selected information together so you can spot outstanding work and ask more focused questions.

05 Getting your books ready

Today: You spend hours gathering statements, chasing receipts, and sorting transactions before you can reconcile your accounts.

With a connected workflow: Documents are organized, missing receipts are flagged, and reminders go out automatically - so you or your bookkeeper can reconcile with less back-and-forth.

Each improvement starts with a familiar frustration. The value comes from making the process easier to follow and more consistent.

09 / THE APPROACH IN PRACTICE

Built around real work.

Different businesses. Specific workflows. A shared approach to connecting the tools around the work.

CaseFlow and ChartFlow by DesignMax illustrate how a Microsoft 365 environment can be developed around the needs of a small office.

CaseFlow

connecting legal office workflows

A legal office manages intake information, case documents, correspondence, requests, and deadlines.

CaseFlow brings structure to that work through connected intake, organized case folders, document templates, case tracking, and a shared workspace.

The purpose is to make case information easier to organize and help staff see what needs attention.

ChartFlow

connecting patient document workflows

A healthcare office handles intake information, patient documents, recurring forms, and staff handoffs.

ChartFlow connects intake, patient folders, document preparation, and status tracking within a shared environment.

The purpose is to reduce repetitive administrative steps and help staff find and manage the information needed for their work.

What that means for your business

Your business may have different customers, documents, and terminology. You may still recognize the underlying challenges:

- Information entered more than once.
- Documents prepared repeatedly.
- Work passed between people.
- Missing details that delay progress.
- An owner who becomes the default person to chase everything.

DesignMax starts with those operational needs and develops the environment around them.

ALSO POSSIBLE / FINANCIALFLOW

Receipts, statements, and reconciliation preparation - shown as a proposed bookkeeping workflow concept.

10 / START SMALL

Start with one problem worth solving.

You don’t have to redesign your whole business to make a useful improvement.

A strong starting point is a task that happens often, follows reasonably consistent steps, and creates a frustration your team can describe.

Ask yourself:

1. Where do we enter the same information more than once?
2. Which documents do we prepare repeatedly?
3. What gets delayed because someone is waiting for information?
4. Which updates do I have to ask for?
5. What stops moving when one particular person is away?

Choose one process and follow it from beginning to end. Identify what starts it, what information it needs, who handles each step, and what completion looks like.

That gives DesignMax something concrete to evaluate and develop.

Decide what improvement would mean

A successful project should produce a benefit you can recognize.

That might mean less time preparing an intake packet, fewer incomplete requests, easier document retrieval, or fewer interruptions to ask for status updates.

Time returned to your team can create capacity, even when it doesn’t immediately reduce payroll expenses. Keep that distinction clear when judging the investment.

What would your team do with five hours back each week?

11 / YOUR NEXT STEP

Why work with DesignMax?

You know your business. We help turn that knowledge into a connected digital environment.

Useful automation takes an understanding of how work actually gets done.

Who needs the information? What happens when something is missing? Which steps require a person's review? What will staff see when they open the system?

DesignMax connects those operational questions to the technology.

We help you identify a worthwhile starting point, organize the information, develop the workflow, and prepare your team to use it. Testing, access, documentation, and ongoing care are part of making the solution dependable in daily work.

You can begin with a focused improvement or develop a broader workspace over time. The scope should fit your priorities, your budget, and the people who will use it.

Let's put your tools to work.

Think about the task that keeps landing back on your desk.

The information entered twice. The document recreated every week. The request nobody can find. The update you have to chase.

That is a place to begin.

DesignMax can help you explore what is possible with your existing tools and define a practical next step.

Bring us one recurring business problem.

Let's explore what a connected solution could look like.

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