Zara Consulting1

BUSINESS ORGANIZATION

Clear responsibilities. Work that flows.

A thoughtful review of roles, decisions and the way work moves through your business.

Organizational design and operational improvement

01 **Understand the friction**

02 **Clarify ownership**

03 **Simplify the work**

04 **Support the transition**

A growing business can outgrow the way it works.

The warning signs often appear in daily frustrations long before they appear in the financial statements.

An order waits because nobody knows who can approve it. Two departments maintain different versions of the same information. A capable manager spends the afternoon chasing updates instead of supporting the team.

Over time, informal arrangements become harder to sustain. The owner remains involved in routine decisions, employees compensate for missing procedures, and customers experience the delays.

ZaraConsulting1 helps identify where the operating model creates friction and develops a proportionate response with the people who do the work.

When to involve us

Growth, recurring delays, overlapping functions, management overload or a change in the business model.

The organization should support the promise you make to customers.

The original focus on innovation and market orientation remains the starting point.

A company promising rapid service needs timely decisions, reliable information and enough capacity at the point of delivery. A premium offer also depends on consistency and effective quality controls.

We connect the commercial promise with the organization needed to deliver it. Innovation may involve a service, a workflow or a different way to coordinate existing expertise.

The review asks which activities help deliver the promise, which controls protect the business and which practices consume resources without a clear purpose.

Client outcome

A shared set of design criteria linked to service, quality, responsiveness and financial constraints.

A review of the organization changes people’s working lives.

Job titles, authority and established relationships carry personal meaning.

Employees may interpret interviews as a search for someone to blame. Managers may fear losing influence. Long-serving colleagues may worry that their experience will disappear from the new design.

We agree with the sponsor how to explain the purpose, scope and decision process. Employees contribute practical evidence, and management remains accountable for decisions and for explaining their consequences.

The review considers workload, skills and support alongside reporting lines. Confidential input requires agreed access rules and careful handling of identifiable comments.

Working principle

Respectful listening, factual analysis and clear explanations make difficult decisions easier to understand.

The review follows the work as it actually happens.

Formal procedures are useful evidence. Daily practice shows where the business really depends on workarounds.

We combine leadership interviews with employee discussions, selected work samples and a walkthrough of priority processes. The depth of the review depends on the assignment and the available evidence.

For a delayed transaction, we trace what triggered it, what information arrived, where it waited and which decision allowed it to move. We compare routine cases with exceptions.

Findings distinguish observed facts from estimates and hypotheses. Management validates the baseline before approving a redesign or a financial benefit claim.

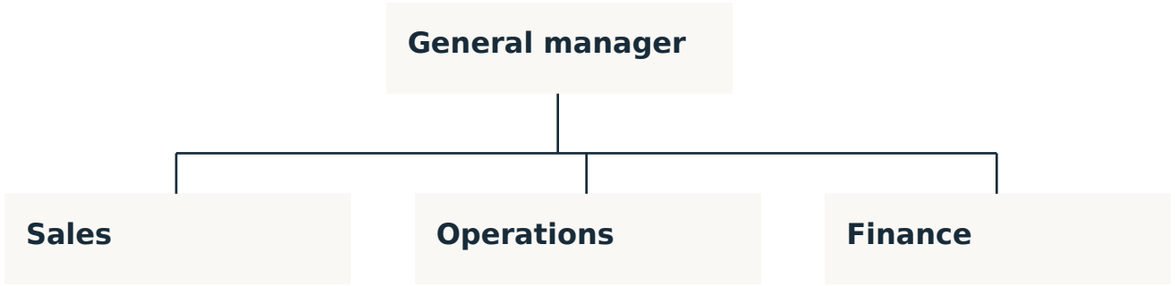
Evidence collected

Current roles, actual decision paths, transaction samples, workload patterns and recurring failure points.

Reporting lines and work flows answer different questions.

The formal chart shows who reports to whom. The operating view shows how a customer request reaches completion.

REPORTING VIEW



OPERATING VIEW

Customer request
Sales captures complete information

Delivery commitment
Operations confirms feasibility

Accurate billing
Finance receives the final record

OUR REVIEW

We examine both views. A revised chart alone cannot resolve incomplete information or unclear handoffs.

A useful role description explains the contribution expected.

A long list of tasks can leave the most important responsibilities unresolved.

For each material role, we clarify its purpose, the outcomes it owns, the decisions it can make and the information it must provide to others. Interfaces and escalation routes receive explicit attention.

A sales manager may own the commercial proposal while finance owns credit approval. Operations confirms capacity. The final offer should follow an agreed decision path when these requirements conflict.

Role descriptions also identify capabilities and backup coverage. Managers review whether expectations fit the time and resources available.

What the client receives

Role profiles, decision boundaries and a practical map of the interfaces that require coordination.

Duplicated work and unowned work often coexist.

Two people can repeat the same task while a critical decision falls between them.

We distinguish useful checks from duplication. Independent review of a payment serves a different purpose from entering the same invoice in two uncontrolled spreadsheets.

Each overlap requires a decision: retain it as a control, combine the activity, assign a primary owner or remove the unnecessary step. Each gap needs explicit responsibility and sufficient capacity.

The redesigned model should preserve required controls and continuity. Removing a duplicate job title does not prove that the underlying workload has disappeared.

Decision test

What purpose does each activity serve, who relies on it and what risk appears if it stops?

Responsibility becomes clearer at the decision level.

A simplified RACI example for a standard customer order. Actual roles and approval limits require agreement.

Activity	Sales	Operations	Finance	Manager
Prepare complete order	A/R	C	C	I
Confirm delivery capacity	C	A/R	I	I
Approve credit within limits	C	I	A/R	I
Decide policy exception	**R**	**C**	**C**	**A**

HOW TO READ IT

A = accountable for the outcome. R = performs the work. C = consulted. I = informed. One A per row in this example.

Delegation works when authority matches responsibility.

An employee cannot own an outcome if every routine decision still requires the owner’s approval.

We define which decisions managers can take, the limits that apply and the circumstances requiring escalation. Limits may reflect value, commercial risk, policy exceptions or customer consequences.

The delegating leader agrees how results will be reviewed and avoids routinely bypassing the appointed manager. Exceptions remain visible so that teams understand when a decision has moved elsewhere.

The arrangement includes information access, preparation and coaching. A periodic review tests whether authority and capability remain appropriate as the business changes.

Practical output

A delegation schedule with decision categories, approval limits, escalation triggers and review expectations.

Management layers should solve a real coordination need.

The right structure depends on complexity, skills and the work managers actually perform.

A manager supervising specialist work across locations faces different demands from a manager leading a stable team with repeatable tasks. A universal target for direct reports can create poor decisions.

We examine managerial workload, duplicated supervision and the time required for coaching, decisions and problem solving. We also examine where too many direct reports leave employees without support.

Options may include clearer team leadership, fewer approval stages or stronger coordination between functions. The design follows the operating requirement.

Leadership development

Managers may need support in delegation, feedback and prioritization as responsibilities change.

Every handoff creates an obligation to the next person.

A department can meet its own target while the customer’s request remains unfinished.

The internal customer principle makes the next step visible. Sales provides a complete order. Operations confirms the delivery commitment. Finance receives the information required to issue an accurate invoice.

We define the information, acceptance criteria and expected turnaround at each important interface. Exceptions have a clear owner instead of circulating through a long email chain.

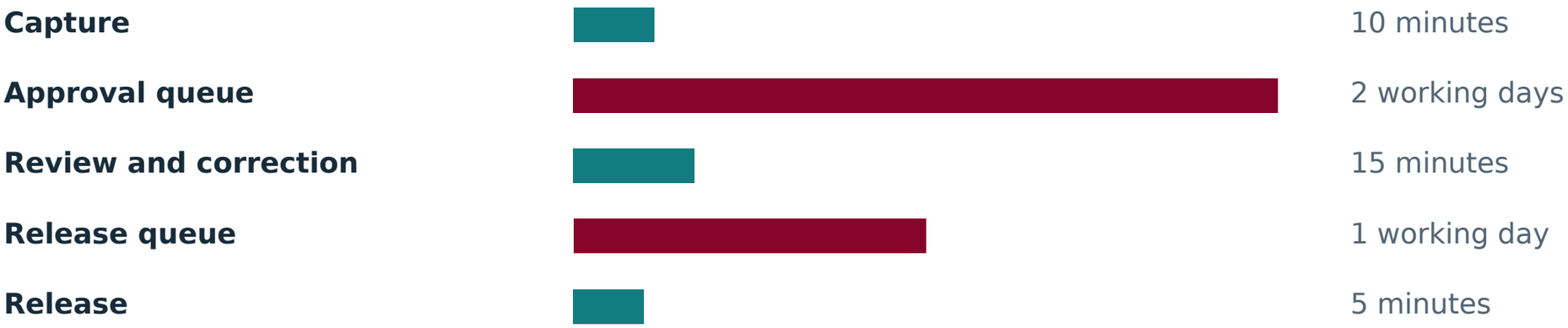
An end-to-end process owner reviews overall results with the functions involved. This helps resolve local practices that shift delays or rework onto another team.

Client outcome

Handoff agreements and shared process measures that support the external customer’s experience.

Thirty minutes of work can take three days to complete.

Invented example of one request. Elapsed time includes waiting and should use a consistent time basis.



DIAGNOSTIC QUESTION

Where does the request wait, why does it wait, and which change removes that cause without weakening control?

Administrative waste often hides inside ordinary routines.

Lean concepts help examine information flows as well as production processes. [1, 2]

Waiting can mean a request sitting in an approval queue. Rework can mean correcting an incomplete order. Unnecessary processing can mean preparing a report that nobody uses.

We examine these patterns with employees and test which changes improve the whole workflow. Some non-customer-facing activities remain necessary for control or business continuity.

The aim is to remove avoidable effort while protecting the purpose of the process. A checklist may add a few minutes upfront and prevent much more correction later.

Examples to investigate

Repeated data entry, unnecessary approvals, obsolete reports, searches for information and avoidable corrections.

Visible busyness does not reveal the real constraint.

Workload analysis needs demand, effort and variation, rather than impressions alone.

We estimate the volume of work and the effort needed for representative cases. We include recurring duties, exceptions, training, absence coverage and predictable peaks.

A team may have enough total hours but lack the skill needed at one critical step. Another may spend substantial time correcting upstream errors. These situations require different responses.

Possible actions include rebalancing duties, improving inputs, cross-training or adding capacity where demand supports it. Sustainable workload remains a design criterion.

Planning output

A capacity view with assumptions, peak periods, skill constraints and options for covering demand.

Coordination should leave enough time to deliver the work.

Recurring meetings and reports deserve the same scrutiny as other activities.

We review what decision each meeting supports, who needs to participate and what preparation it requires. Information that does not require discussion may use a simpler update.

Reports need an audience, an owner and an action they support. A controlled retirement of unused reports can remove preparation time without reducing management visibility.

The new routine includes an agenda, documented decisions and follow-up ownership. A shorter meeting is useful only if it still resolves the issue that brought people together.

A practical question

What would change in the business if this meeting or report stopped, and who would notice?

The right forum connects a problem with a decision.

A proportionate routine keeps operational detail from consuming every management discussion.

Forum	Purpose	Participants and output
Short operating check	Resolve current delivery exceptions	Relevant owners and an action record
Weekly process review	Address repeated cross-team problems	Process owner, functions and decisions
Monthly management review	Review capacity and business results	Leadership and agreed priorities
Design review during transition	**Approve unresolved changes**	**Sponsor, design team and decision log**

TAILORING

Frequency and participation follow the business need. These forums illustrate a design, rather than a mandatory meeting schedule.

Digital tools work better after the process becomes clear.

Automating an unclear responsibility can make the same problem travel faster.

We first simplify the workflow and define who owns the information. Then we assess whether existing systems can support the required approvals, shared records and reporting.

Automation candidates should have sufficiently stable rules and a manageable exception path. Access permissions, data quality and an audit trail remain part of the design.

For AI-assisted tasks, management defines permitted information, review requirements and who remains responsible for the output. A pilot establishes whether the tool actually reduces effort and error.

Investment discipline

Compare configuration, integration, licenses and support costs with benefits that the team can demonstrate.

A simpler organization still needs reliable safeguards.

Efficiency decisions must account for errors, misuse and dependence on individual people.

We identify duties that require independent authorization or review. In a small business, limited staffing may require an owner’s documented review as a compensating control.

We also examine critical knowledge held by one individual. Coverage plans, documented procedures and cross-training can reduce exposure during absence or departure.

The future organization includes access reviews and evidence of key checks. Where the review raises specialist accounting or legal questions, the responsible advisers join the decision.

Control question

Who initiates, approves, records and reviews the transaction, and what evidence confirms the check?

An order delay can begin long before delivery.

Invented service-company example. The figures illustrate the method and do not describe a client result.

Sales submits orders by email. Operations re-enters the details, finance requests missing billing information, and the owner approves ordinary cases together with genuine exceptions.

The proposed design uses one complete order record, explicit acceptance criteria and delegated approval for routine orders. Exceptions receive a named owner and a visible escalation route.

The team pilots the approach on one order category. It compares processing effort, total elapsed time, errors and customer issues before extending the design.

Hypothesis to test

Fewer corrections and routine approval delays may release capacity and shorten response time.

A ten-minute improvement releases 100 hours a month.

Invented assumptions: 600 orders per month. Average processing effort falls from 30 to 20 minutes per order.

Measure	Calculation	Result
Current monthly effort	600 × 30 ÷ 60	300 hours
Proposed monthly effort	600 × 20 ÷ 60	200 hours
Potential capacity released	300 - 200	100 hours / month
Illustrative capacity value	100 × $35 loaded hourly cost	$3,500 / month
Annualized capacity value	**$3,500 × 12**	**$42,000 / year**

FINANCIAL INTERPRETATION

Capacity value does not automatically reduce payroll or create cash savings. Validate the pilot, demand and use of the recovered hours.

Recovered time needs a clear business use.

Capacity, expense reduction and service improvement require different evidence.

If employees use recovered hours to handle more work, the immediate benefit is capacity. A payroll saving requires a supported reduction in paid cost. Avoided hiring needs a credible demand forecast and hiring baseline.

We track implementation costs, any recurring software expense and the timing of benefits. Management assigns an owner for each material improvement and documents how it will appear in operations or the accounts.

Better service may protect revenue or improve retention, but a financial claim needs evidence. The same recovered hour cannot support two separate savings claims.

Benefit register

Baseline, calculation, confidence level, implementation cost, timing, owner and evidence of realization.

Several organizational options may solve the same problem.

Management should understand the consequences before selecting a model.

A central service team can improve consistency but may lose local responsiveness. Local ownership can speed decisions while requiring common standards to avoid fragmentation.

We compare options against the agreed design criteria and test the effects on service, accountability, capacity and cost. Dependencies on people and systems remain explicit.

The recommendation explains the tradeoffs and the conditions required for success. A staged design can preserve continuity while allowing the company to learn.

Decision package

Options, evaluation criteria, expected effects, risks and a recommended sequence for implementation.

People need to understand how their work will change.

An approved chart is only the beginning of implementation.

Employees need a clear explanation of new responsibilities, reporting relationships and decision boundaries. Managers prepare to answer questions about workload and day-to-day coordination.

We support role discussions, process walkthroughs and targeted training. The transition plan identifies temporary coverage, unresolved decisions and the date each new arrangement takes effect.

Where roles may change materially or disappear, management coordinates the appropriate HR and legal review before implementation. Communication must reflect actual decisions and avoid promises the business cannot keep.

Transition support

Role briefings, manager guidance, training, a question log and an agreed route for raising concerns.

A limited pilot tests whether the design works in practice.

One process or business unit can reveal weaknesses before the wider rollout.

The pilot has a defined scope, a baseline and agreed success criteria. Participants know where to record issues and who can authorize adjustments.

Management compares service, effort and control performance with the baseline. A faster process that creates more errors or unsustainable workloads requires further revision.

The rollout follows evidence from the pilot. Updated procedures, role ownership and support arrangements accompany the wider implementation.

Decision at review

Proceed, revise or extend the pilot based on observed results and remaining operating risks.

A balanced review shows whether the new model helps.

Use a small set of measures with stable definitions, clear owners and an agreed baseline.

Dimension	Example measure	What management checks
Customer service	On-time completion rate	Service reliability across the full process
Flow	Median and 90th percentile lead time	Typical performance and difficult cases
Quality	First-pass completion rate	Cases completed without correction
People and capacity	Overtime and workload distribution	Sustainable effort and uneven pressure
Financial benefit	**Verified cost or avoided expense**	**Realization against the approved baseline**

REVIEW DISCIPLINE

Compare like-for-like volumes and case mix. Investigate whether an apparent improvement simply transfers work to another team.

ZaraConsulting1 supports the work from diagnosis to adoption.

The engagement can address one recurring problem or a broader organizational review.

The diagnostic stage provides a current-state view of roles, decisions and priority workflows, supported by evidence of the main friction points.

The design stage develops role profiles, process maps and decision rules. Management receives options and an implementation plan with responsibilities and dependencies.

The implementation stage can include workshops, pilot support and progress reviews. Scope, timing and the involvement of internal specialists are agreed before the work begins.

Client ownership

Leadership approves decisions. Process and role owners maintain the new arrangements after the engagement.

A staged review gives management regular decision points.

Timing depends on business size, access to information and the breadth of the assignment.

An initial phase agrees the problem, sponsor and boundaries. Interviews and process walkthroughs establish the operating baseline and priority issues.

The next phase develops alternatives with the teams involved. Management selects the design and confirms the resources required for a limited pilot.

Implementation then proceeds in stages, with clear owners and review dates. An illustrative 8–12 week review and pilot may suit a contained scope. A wider restructuring can require substantially longer.

Conditions for progress

Sponsor availability, employee participation, usable operating data and timely management decisions.

The best starting point is a recurring business frustration.

A focused conversation helps establish whether the issue is local or reflects a wider organizational problem.

Where does work stall?	Identify the recurring delay or conflict with the largest business consequence.
Who compensates for the problem?	Look for informal coordination, repeated checking and reliance on a few individuals.
What would better performance mean?	Agree a visible improvement in service, effort, reliability or management capacity.

STARTING SCOPE

One priority process can provide an effective first assignment and establish whether a wider review is justified.

Selected references supporting the approach.

The presentation expands the original ZaraConsulting1 themes of customer value, processes, structure and delegation.

[1] Lean Enterprise Institute	Seven wastes: categories used as a diagnostic lens.	**OPEN**
[2] Lean Enterprise Institute	Value-stream mapping: current and future information flows.	**OPEN**

The role matrix, process timelines and order-processing case are original explanatory illustrations. They are not reported client outcomes or performance guarantees.

SOURCE NOTE

References checked October 15, 2026. Lean ideas inform the process analysis. Engagement deliverables are tailored to the client.

Zara Consulting1

When work becomes harder than it should, the organization deserves a closer look.

ZaraConsulting1 helps clarify responsibilities and improve the flow of work, with attention to the people who make the business run.

LET’S DISCUSS YOUR ORGANIZATIONAL PRIORITIES

zaraconsulting1@gmail.com

www.zaraconsulting1.com