case study

**Business Operational Support System (BOSS)
& Process Mapping - Driving Operational Efficiencies**

Sean and Vicki from LightSide Financial Planning foster a culture of continual improvement and wanted to elevate their existing processes, streamline core data to create a system to capture meaningful business MI.

After identifying key areas for improvement, they partnered with Jigsaw Tree to redesign their business processes, optimise their use of intelliflo office (io), and implement BOSS - a framework built on the principles of EOS which focuses on six core areas: Mission, Data, Process, Execution, People, and Issues, all with the goal of enhancing operational efficiency and scaling the business effectively.

And so, their transformation journey began...

"As we continue to refine and implement the BOSS framework in our Level 10 meetings, we're already seeing significant progress in how we address challenges and enhance accountability. While some elements, like the scorecard that drives our business forward and improves visibility, are still being fine-tuned, we're fully embracing the agenda and the core principle of effectively tackling issues together."

Sean McDermott - LightSide Financial Planning

Key Services

- BOSS Implementation

- Process Mapping using Engage Modeler

- io Optimisation

case study

light side

Business Operational Support System (BOSS) & Process Mapping - Driving Operational Efficiencies

"Designing and refining processes isn't just about efficiency - it's about creating the Lightside way of operating, ensuring consistency, clarity, and continuous improvement. By optimising the use of io, we're not only streamlining workflows but also empowering our team with the right structure and tools to drive better outcomes."

Vicki Langdon - LightSide Financial Planning

Structure & Accountability

Using our Organisational Assessment Form, we evaluated the firm's baseline and tracked progress. We introduced accountability charts, issue logs, structured meetings with documentation, and operational scorecards. These tools enhanced clarity and supported recruitment and performance appraisal processes.

Process Improvement

Through a combination of on-site and remote workshops, we fully mapped all key business processes to streamline operations and improve efficiency.

io Optimisation

We configured and trained the team on the io platform to improve data management, refine workflows, and maximise system value.

Contact us!

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