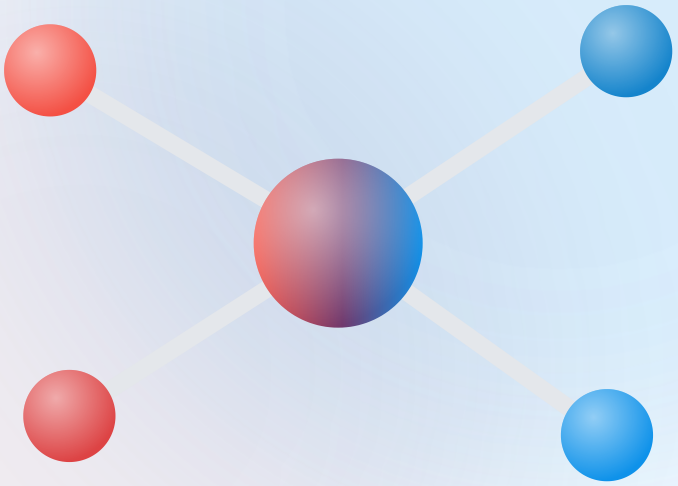
TRUE LEAN SOLUTIONS
LEAN THINKING REAL RESULTS.

THE FIELD GUIDE

Don't Carry That Problem Into 2027

How to define, price and fix the business problem you carried all year, before December 31.



5	6	30
practical steps	printable worksheets	working days, planned

A free guide from True Lean Solutions · November 2026

THE FIELD GUIDE

Leave it in 2026.

Every December, the same line gets copied from one year's plan into the next: fix the order process, get the systems talking, build the client portal, figure out AI. This guide is a practical way to end one of those problems before the year closes, or at least to start January knowing exactly what it is, what it costs and what the fix should be.

It's written for founders, CEOs and operations leaders of growing businesses who don't have a technology leader on staff. It's the same method we use with clients at True Lean Solutions, laid out so you can run it with your own team.

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HOW TO USE IT

Read it once on your own. Then print the **worksheets** (marked with a dark label) and work through them with your leadership team in one sitting of about 90 minutes. Bring the people who live with the problem every day.

KEY TAKEAWAYS

- Most problems that last a year aren't technically hard. They were described as a solution, their cost was never added up, or they looked too big to start.
- Write the problem in one sentence without naming any technology, then ask "why?" until you reach the cause.
- Put a yearly cost on it. That number tells you whether to act now and caps what the fix should cost.
- Climb a six-step ladder from "remove the step" to "build custom software" and stop at the first step that works.
- For product ideas and AI, start smaller than feels comfortable. Small, well-defined projects are the ones that succeed.

01 · THE PATTERN

Why some business problems survive a whole year

When a problem has lasted twelve months, it's rarely because it's technically difficult. In our experience it survives for one of three reasons.

1. It was written down as a solution

"We need a new CRM." "We need an app." "We need AI." Each of these describes a purchase, not a problem. Once a problem is phrased as a product, every conversation turns into a vendor comparison, and nobody checks whether the product would have fixed anything.

2. Its cost is spread thin

Ten minutes of re-keying here, a status meeting there, a spreadsheet someone rebuilds every Friday afternoon. No single loss is big enough to force a decision, but together they add up.

Asana's Anatomy of Work research, based on a survey of more than 10,000 knowledge workers, found that people spend about **60% of their time on "work about work"**: chasing updates, searching for information and switching between apps. Very little of that appears as a line in anyone's budget, so very little of it gets fixed.

3. It looks too big to start

A problem that seems to need a big project waits for a big budget and a quiet quarter. Neither arrives. Yet small projects are the ones that work. The Standish Group has tracked software project outcomes since 1994, and its 2015 CHAOS data found **small projects were at least ten times more likely to succeed** than large ones.

So the job before December 31 is to make the problem specific, put a price on it, and shrink it to something you can start. The five steps that follow do exactly that.

02 · STEP 1

Define the problem without naming a technology

Clear problem definition is the foundation of any business process improvement. Skip it and every later decision rests on a guess.

Write a one-sentence problem statement

> **[Who]** spends **[time or money]** on **[what]** because **[cause]**, and the result is **[consequence]**.

Example: "Our three account managers each spend about six hours a week copying orders from email into the ERP, because the web store and the ERP don't share data, and the result is shipping errors that cost us repeat customers."

The sentence doesn't mention a CRM, AI, a platform or an app, and that's deliberate. If you can't write it without those words, you're still describing a solution.

Use the 5 Whys to find the root cause

The 5 Whys is a root cause analysis technique that came out of Toyota's production system and sits at the centre of lean thinking. State the problem, ask why it happens, then ask why again about each answer. Five rounds is a guide, not a rule. Stop when you reach a cause you can act on.

QUESTION	ANSWER
What's the problem?	"We need a new CRM."
Why?	Sales can't see where an order is.
Why?	Order status lives in the ERP, and sales works in the CRM.
Why does that matter?	Someone copies updates between them by hand.
Why is that a problem?	It happens late or not at all, so customers get wrong answers.
Root cause	**The two systems don't share order status.**

The business doesn't need a new CRM. It needs two systems that share one piece of data. That fix can cost a fraction of a CRM migration and take weeks instead of months.

WORKSHEET 1

Name the problem

The problem we have carried longest this year, in our own words

One-sentence problem statement (no technology named)

[Who] spends [time or money] on [what] because [cause], and the result is [consequence].

5 Whys

ROUND	ANSWER
Problem	
Why? 1	
Why? 2	
Why? 3	
Why? 4	
Why? 5	
Root cause	

Who feels this problem most?

GET AGREEMENT BEFORE MOVING ON

Read the sentence to the people who live with the problem every day. If they say "that's it, exactly," move to step 2. If they start correcting you, you've just saved yourself from fixing the wrong thing.

☐ The people who deal with this every day agree with the problem statement.

03 · STEP 2

Calculate what the problem costs

A problem with a cost attached gets decided. A problem without one gets discussed.

The formula

> **Annual cost** = hours lost per week × people affected × hourly cost including benefits × 48 working weeks, **plus** the cost of errors **plus** the cost of delays

A worked example

The figures below are illustrative. Replace them with your own on Worksheet 2.

INPUT	EXAMPLE VALUE
People affected	4
Hours lost per person per week	5
Hourly cost including benefits	$40
Working weeks per year	48
Annual labour cost	**$38,400**
Errors per month × cost per error	6 × $150
Annual error cost	**$10,800**
Total annual cost	**$49,200**

What the number tells you

1. **Whether to act now.** A $49,000-a-year problem deserves attention before January. A $3,000-a-year problem may not.
2. **What the fix should cost.** As a rule of thumb, if the fix costs more than one or two years of the problem, look for a smaller fix.

You won't get the number exactly right, and you don't need to. A cautious estimate your team believes is worth more than a precise one nobody trusts. Measuring the cost of manual work this way also gives you a baseline to prove the fix worked later.

WORKSHEET 2

Put a price on it

INPUT	VALUE	NOTES
A. People affected		
B. Hours lost per person per week		
C. Hourly cost including benefits	$	
D. Working weeks per year	48	
E. Annual labour cost (A × B × C × D)	$	
F. Errors per month		
G. Average cost per error	$	
H. Annual error cost (F × G × 12)	$	
I. Cost of delays (lost sales, late payments, churn)	$	
Total annual cost (E + H + I)	**$**	

Budget ceiling for the fix (one to two years of the problem)

What we will measure to prove the fix worked

For example: hours per week, error rate, turnaround time, onboarding time.

Baseline today

04 · STEP 3

Choose the lightest fix that will hold

Most leaders jump straight to building or buying something. Climb this ladder instead, and stop at the first step that solves the problem.

1. **Remove the step**
   The work adds no value. Signal: reports nobody reads, approvals nobody ever refuses.
2. **Set up what you already own**
   Your current tools can do it. Signal: features you pay for but don't use.
3. **Connect your systems**
   Data exists but sits in the wrong place. Signal: the same data typed into two or more tools.
4. **Automate the workflow**
   The process is right but repetitive. Signal: copy, paste, check, send, repeat.
5. **Build custom software**
   Your workflow really differs from what tools assume. Signal: workarounds stacked on workarounds.
6. **Add people**
   What's missing is skill or capacity. Signal: the right process with nobody to run it.

Why you start at the bottom

Lean thinking says to remove waste before you automate it. Automating a broken process just produces the wrong result faster. Each step up the ladder costs more and takes longer, so the lowest step that holds is almost always the best value.

04 · STEP 3 IN PRACTICE

System integration: a logistics client

A logistics client of ours ran six platforms that didn't talk to each other. Staff spent more than 20 hours a week on manual entry, and fulfilment errors were costly. The fix connected the six systems instead of adding a seventh.

73%	~0	~$3M
less manual data entry	fulfilment errors	saved a year in operating costs

That was step three on the ladder.

Workflow automation: a professional services firm

A professional services firm managed its projects across email, spreadsheets and tools that didn't connect. A custom workflow system with automated onboarding, central project tracking and billing integration changed the numbers.

15 hrs	3 days → 4 hrs
of manual work removed every week	client onboarding time

Build vs buy: how to decide

When you reach step five, this is the question that matters.

BUY OFF-THE-SHELF WHEN	BUILD CUSTOM WHEN
Your process is standard for your industry	Your process is part of how you win
A tool covers 80% or more of what you need	Every tool forces workarounds
You can change your process to fit the tool	Changing the process would cost you customers or margin
Speed matters more than fit	Off-the-shelf costs grow with every user or transaction

Being honest about this question protects your budget. Sometimes the right answer is the tool you can buy this afternoon.

WORKSHEET 3

Choose your fix

Work up from step 1. Tick the first step that would solve the root cause from Worksheet 1.

	STEP	COULD THIS SOLVE IT? HOW?
☐	**1. Remove the step**	
☐	**2. Set up what we own**	
☐	**3. Connect our systems**	
☐	**4. Automate the workflow**	
☐	**5. Build custom software**	
☐	**6. Add people**	

If step 5: build or buy? Which column in the build vs buy table describes us?

The fix, in one sentence

Owner

Estimated cost

Target date

05 · STEP 4

If it's a product idea, test the riskiest assumption first

Many founders end the year with a software product they still haven't built. It's tempting to start coding in December so the year counts for something. Hold off.

Why most products fail

CB Insights has studied startup post-mortems for years. **"No market need" is consistently the most cited reason startups fail**, appearing in roughly 35% to 42% of them depending on the year. Most of those products were built well. They were built for a need that wasn't there.

A practical approach to MVP development

1. **Name the assumption that would sink the idea.** Usually it's "people will pay for this," "people will change how they work to use it," or "we can reach buyers at a cost that makes sense."
2. **Test it as cheaply as you can.** Talk to 15 to 20 likely buyers. Show them a clickable prototype. Or run the service by hand for ten customers before automating anything.
3. **Map what the product must do before anyone estimates it.** We once helped define a platform from a blank page: no specification, no team, only a market thesis. The team agreed on nine areas the platform had to cover, broke each into features and functions, and fixed the scope of three delivery phases before any development began. It sounds slow, but it's what made the estimates and the progress reports mean something.
4. **Define version one by what it must prove.** An MVP with one feature that proves demand beats one with twenty features that proves nothing.
5. **Decide the hard rules early.** Who can see what, how money moves, what must be auditable. These are much cheaper to build in from the start than to add later. On another platform, we stored commission rates as dated records so every payout could be traced to the rate in force on the day of the sale. That removed a whole category of disputes.

> **USE THE LAST WEEKS OF THE YEAR WELL**
>
> The last weeks of a year are a good time to validate an idea and scope phase one properly. Starting January with that done will get you to launch faster than starting December with code.

WORKSHEET 4

Test the product idea

The product in one sentence: who it's for and what it does for them

The assumption that would sink it if wrong

The cheapest test of that assumption

Interviews, a clickable prototype, or the service run by hand.

What result would tell us to go ahead?

What version one must prove (and nothing more)

Hard rules to decide now (access, money movement, audit)

06 · STEP 5

If it's AI, start with one workflow

AI is the most common item on year-end lists right now, and the numbers show why it's so hard to cross off.

Trying AI is common. Running on it is not.

- A Goldman Sachs 10,000 Small Businesses survey of 1,256 owners, fielded in early 2026, found **76% already use AI** in some form. Yet **73% said they would benefit from more training and resources** to put it in place and judge whether it works.
- Thryv's 2026 survey of 561 small and mid-sized business decision-makers put adoption at 66%, up from 55% a year earlier.
- The U.S. Census Bureau's Business Trends and Outlook Survey uses a stricter measure. It put the share of businesses using AI in any business function at 17% to 20% by May 2026.

Your team may have already decided for you

Verizon's 2026 Data Breach Investigations Report found that **45% of employees now regularly use AI tools on work devices**, three times the share a year earlier. About two-thirds of AI users reach those tools through personal accounts the company doesn't control. Customer details, contracts and financial figures may already be sitting in tools nobody at your company approved.

Data comes before models

In MuleSoft's 2025 Connectivity Benchmark Report, 95% of IT leaders said integration is a hurdle to implementing AI effectively. If your systems don't share data, AI won't fix that. It will make the gap more visible. That's why steps 1 to 3 come first.

Good first AI workflows

WORKFLOW	INPUT	OUTPUT	MEASURE
Meeting follow-up	Recorded calls	Minutes, decisions, action items	Time to follow-up email
Invoice processing	Supplier invoices	Entries in the accounting system	Hours per month, error rate
Lead handling	Website and email enquiries	Qualified lead record with summary	Response time
Internal Q&A	Policies and procedures	Answers with the source linked	Questions sent to managers

WORKSHEET 5

Start AI safely

The one workflow we will start with

Input

Output

What data does it touch, and where is that data allowed to go?

The one number we will measure for 30 days

AI starter checklist

- [ ] Pick one workflow with a clear input and a clear output.
- [ ] Decide where data is allowed to go before you choose a tool.
- [ ] Write a one-page AI usage policy your team can follow.
- [ ] Give people an approved tool instead of a ban. Bans push AI use out of sight.
- [ ] Make sure the tool has access rules and keeps a record of who used it.
- [ ] Measure one thing for 30 days: hours saved, turnaround time or error rate.

07 · THE PLAN

A week-by-week plan to December 31

Starting Monday, November 16, there are about 30 working days left in 2026 once Thanksgiving and Christmas are taken out. Here's how to use them.

WEEK	DATES	FOCUS	OUTPUT	OWNER	DONE
1	Nov 16 to 20	Define and price	Problem statement, annual cost		
2	Nov 23 to 25	Decide	Step on the ladder chosen, owner named		
3 to 5	Nov 30 to Dec 18	Fix or validate	One integration, one automation, or a tested product assumption		
6	Dec 21 to 23	Hand over	Process documented, team trained		
7	Dec 28 to 31	Review	Results against the Worksheet 2 baseline, Q1 scope written		

Realistic before the holidays

- A problem statement your leadership team agrees on
- A cost estimate and a budget ceiling for the fix
- One connection between two systems, or one automated workflow
- An AI usage policy and a pilot with one team
- Repairing an internal tool that broke and was never fixed

Better left for Q1, planned now

- A full custom platform or product build
- Replacing a core system such as an ERP
- A company-wide AI rollout

That last "realistic" item is more common than you'd think. A wellness business we work with relied on a stock-tracking tool that had been broken for over a year and a half. It was fixed within hours. Some problems last a year only because nobody owns them.

07 · AVOID THESE

Five mistakes that keep problems alive

1. **Automating a broken process.** Fix the process first, or you'll get the wrong result faster.
2. **Buying software to solve a communication problem.** If two teams don't agree on a handoff, a new tool won't make them agree.
3. **Building the whole product at once.** Scope phase one around what it must prove.
4. **Banning AI instead of governing it.** People will use it anyway, just where you can't see it.
5. **Leaving the problem without an owner.** A problem shared by everyone is owned by no one. Put one name next to it.

WORKSHEET 6

Year-end checklist

Answer these with your leadership team in one sitting.

- [ ] What is the one problem we have carried longest this year?
- [ ] Can we describe it in one sentence without naming a technology?
- [ ] What did the 5 Whys reveal as the root cause?
- [ ] Who feels it most, and how many hours a week does it cost them?
- [ ] Using a cautious estimate, what does it cost per year?
- [ ] What is the lowest step on the ladder that would fix it?
- [ ] What can we finish in the remaining working days of the year?
- [ ] What will we measure to know it worked?
- [ ] Who owns it, by name?

> If the last question has no answer, that's probably why the problem made it through the year.

09 · FAQ

Questions leaders ask

What is the best way to identify the root cause of a business problem?

Write the problem as one sentence without naming a technology, then use the 5 Whys. Ask why the problem happens, then why again about each answer, until you reach a cause you can act on. Check the result with the people who deal with the problem every day.

How do I calculate the cost of manual work in my business?

Multiply the hours lost per week by the number of people affected, their hourly cost including benefits, and 48 working weeks. Then add the yearly cost of errors and delays. A cautious estimate is enough to make a decision.

Should a small business build custom software or buy an off-the-shelf tool?

Buy when your process is standard and a tool covers most of what you need. Build when your workflow is part of how you compete and off-the-shelf tools force constant workarounds. Before either, check whether connecting or setting up your existing tools would solve the problem.

What is the difference between system integration and workflow automation?

System integration connects tools so data moves between them without being re-entered. Workflow automation takes the repetitive steps in a process and runs them without manual effort. Most automation depends on integration, which is why connecting systems usually comes first.

How should a small business start using AI safely?

Choose one workflow with a clear input and output. Decide where your data is allowed to go, write a short usage policy, and give staff an approved tool with access rules and a record of use. Measure one result for 30 days before expanding.

Can we build an MVP before the end of the year?

You can usually validate the idea and scope the first phase in the remaining weeks. Building the product itself is better planned for Q1, once you know which assumption the first version has to prove.

What can a business realistically fix in the last six weeks of the year?

You can define and price one problem, choose the right fix, connect two systems or automate one workflow, and run an AI pilot with one team. Larger builds and system replacements are better scoped now and started in January.

10 · NEXT STEPS

Don't carry that problem into 2027

You now have a problem statement, a price, a fix and a plan. If you'd like a second pair of eyes on any of it, that's the work we do every day.

Book a free 30-minute call

Bring your completed worksheets. In 30 minutes we'll pressure-test your problem statement, check your cost estimate, and tell you honestly which step on the ladder we'd start with, including when the answer is a tool you can buy this afternoon.

Book at trueleansolutions.com

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About True Lean Solutions

True Lean Solutions is a technology partner for growing businesses. Headquartered in Prosper, Texas, with delivery teams in India, TLS combines a consulting mindset, lean thinking and hands-on engineering to build custom software, connect systems, automate workflows and put private AI to work. Every engagement starts with the real business problem.

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