



IMPROVING OPERATIONAL EFFICIENCY

SIGNS YOU ARE READY FOR
SOME WORKFLOW AUTOMATION

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WORKFLOW AUTOMATION

IS IT THE RIGHT TIME FOR YOU?



"The pain of real world workflows is often a sign of a company's growth."



Cleverly works primarily with what we call 'physical first' businesses. These are businesses like restaurants & bar chains; manufacturers; hotels; facilities management companies; property & office managers; care homes and the like. The thing that all these businesses have in common is that the majority of their value is delivered IRL (in the physical world).

Having said that, the other thing that they have in common is that they have workflow processes and human capital that transcend the digital and physical. The vast majority of them still have considerable human resources spent in front of a computer (or adding or pulling information to or from a mobile device).

But first, on an optimistic note, often the pain of real world workflows is often a sign of a company's growth. Things that were able to be deprioritised previously are now becoming a hindrance because physical processes often do not scale. Second, there are ways in which workflow automation can impact these processes as well. We know because that is what Cleverly does - this will give you back some time and allow you to focus more on what is working.

No person is an island, and no business (of scale) is IRL only. So, given the need for such businesses to have both digital and physical capabilities, and the requirement to easily and seamlessly move from one to the other, what are some signs you're ready for some workflow automation?

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1.

YOUR BUSINESS IS SPENDING MORE TIME ON COMPUTERS AND OTHER DEVICES THAN DELIVERING REAL VALUE TO CUSTOMERS

This is often the first sign of the need to embrace some workflow automation and process digitalisation.

In all likelihood, delivering your goods and services is the culmination of considerable prior effort including; engaging external contractors and suppliers; maintenance and management of the physical spaces; finance, accounting and payment reconciliation, legal, regulatory and compliance requirements; collection and analysis of data. That is not even including the administrative tasks or activities such as marketing.

And whilst not strictly true, a lot of this seems like pure cost or expense. You are not making money from paying customers while dealing with equipment downtime or getting information related to a purchase order. The chances are other companies within your industry are facing similar challenges. This means you can turn operational efficiency into a competitive advantage and what seemed like a hindrance to growth is actually an opportunity.



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2.

YOU ARE LOOKING AT WAYS TO REDUCE OFFICE OVERHEAD OR CONCERNED IT IS BECOMING AN INCREASING SHARE OF REVENUES

Obviously when processes become overwhelming, the instinct is to find solutions that minimise the associated burdens associated. This is a step in the right direction - to more efficient business operations.

Typically for small and medium sized businesses the software tools are Excel spreadsheets, CRM solutions, calendar and diary functions, desk or meeting room booking software, WhatsApp and/or Slack, compliance register software, suppliers' software. Obviously these were not built to be interoperable, and in most cases cannot be integrated (or at least not without considerable development resources).

What you really want is for work (and workflows) to move seamlessly from one part of your business to another e.g. for new onboarding a new customer to trigger a work order to a third party supplier or for tenants raising requests to get routed to a property manager for approval which triggers release to an approved, pre-designated contractor.

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3.

YOU ARE LOOKING AT WAYS TO REDUCE OFFICE OVERHEAD OR CONCERNED IT IS BECOMING AN INCREASING SHARE OF REVENUES

The goal of workflow automation is to improve operational efficiency.

As we say above, normally the impetus for looking at options normally comes as a result of concern over the level of corporate overheads relative to revenues. Workflow automation allows you to get the economies of scale that come with a growing business. It also allows you to improve your margin even without growing revenues.

Whether this is a desire for operators and owners to achieve target levels or to return to margins they were achieving before the business started to grow, workflow automation allows them to achieve these improvements and demonstrate returns on investment.



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CONCLUSION

In physical first businesses the opportunity for margin improvement is disproportionately within the operational aspects of their businesses. This is because it is more difficult to improve cycle times to the same degree when it comes to the physical delivery of the good or service. You can only reduce staff to customers to a certain level before the service level suffers and business is reduced as a result.

Workflow automation therefore offers huge opportunities within this segment. The best companies can grow without the need to increase overhead expenses, which allows them to grow further and continue to improve their margins. It is a virtuous circle that will differentiate players within the space.

There is no question that it will take some initial investment upfront to map the existing processes (which will already be known to staff) and install the systems, but it will have long term payoffs that will increase with time.



