The SMEs guide to process automation

How to transform manual legacy processes into time-saving, efficient workflows

8 pages of customer stories and expert tips

ethos hub

Executive summary

Better staff satisfaction and output, less human error, improved customer experience and more compliant processes are some of the benefits of automating business processes.
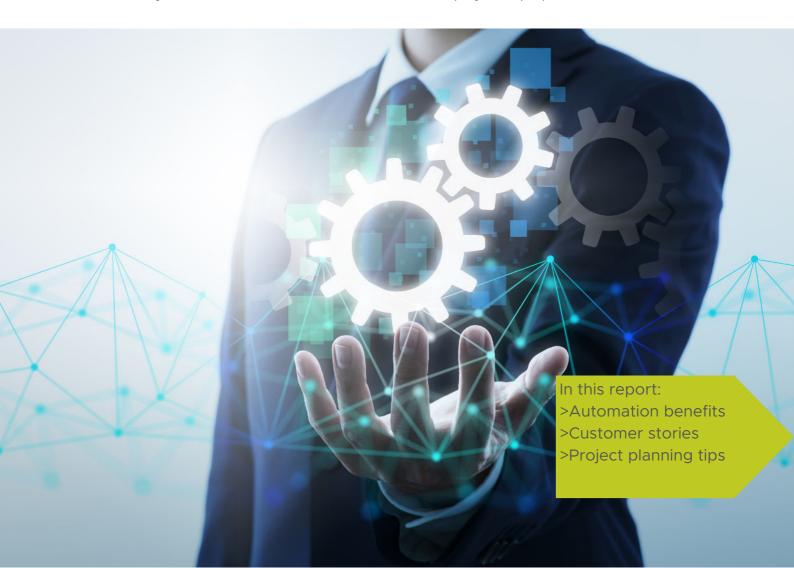
For small and medium-sized enterprises (SMEs) it may feel challenging to know where to start though and risky to dedicate people and budget to developing in-house automation solutions.

This report aims to address these considerations by first looking at the benefits of automating manual workflows for SMEs and how to assess the value of automation to your business.

Ethos customers tell the best stories which is why we have included two case studies showcasing the positive benefits of automating legacy workflows. One mid-market law firm has made "significant savings" while a construction company has reduced costly operational errors.

The message from their IT directors is to start your automation journey by identifying one labour-intensive workflow, give teams time to adopt it, and then expand your digital transformation from there.

Lastly, you will find tips from Ethos experts on how to plan for a business process automation project to prepare for success.

In this report:
>Automation benefits
>Customer stories
>Project planning tips

What are the benefits of workflow automation?

Allowing teams to focus on high-value functions brings revenue back to your business

Automating workflows has many advantages to offer small and medium-sized companies, including making the best use of your greatest asset – your staff

As software solutions for automating business processes become more accessible to companies of any size, SMEs are right to weigh up the value of reducing manual inputs to workflows.

Some questions to ask to assess the difference automation can make to your business are:

- Are we getting the most out of our people?
- Are sales teams spending more time on CRM than face time with customers?
- Are professional services staff hampered by manual document workflows, leaving less time for billable hours with clients?
- What is the value to the business if teams can do 10% more high-value work?

1. Maximising staff expertise and time

At Ethos, we work with clients to find their hidden margins – the cost to the business of not using your staff's time effectively.

By using this approach, you arrive at an estimate of the gain from automating workflows. We recommend calculating the hourly value of staff's time and then quantifying how much of their capacity is spent on manual processes.

Giving teams the chance to focus on higher-value functions brings revenue back to your business. By giving your people time back, they will also feel greater satisfaction in their job role.

Efficiency

Staff Satisfaction

6

Benefits of automating workflows

Productivity

Consistency

Customer Experience

Data Analytics

What types of workflows can SMEs automate?

- ☑ Customer onboarding
- ☑ Sales order processing
- ☑ Human resourcing processes
- ☑ Marketing campaigns
- ☑ Accounts payable

2. Improved service delivery

Having staff who are motivated and focused on growth is one benefit of automating repetitive tasks but so is providing excellent service to customers or end users.

When onboarding a new client involves receiving lots of documents, this can translate to a multiple-step process internally before being able to open a new case file and get started with the actual work. An automated workflow can reduce most of the manual input and streamline the steps so you start serving the client more quickly and efficiently.

For transactional businesses, business automation can help improve customer service by automating workflows such as order processing and tracking, allowing SMEs to provide customers with real-time updates as well as respond to customer inquiries more quickly and efficiently.

3. Data integration and insights

A single view of how one department or function is running is so important to SMEs. When data is unstructured or semi-structured and being manually processed, it may not end up in the right system.

Automated workflows offer consistency – the same type of document is processed in the same way every time, reducing the margin of error, queries and delays to daily operations.

Data can also get stuck in legacy systems unable to talk to other cloud-enabled systems leaving someone with a manual job to get the data out. The benefit of integrating systems with custom connectors during an automation project is ensuring all parts of your technology stack play nicely together.

Then there is the value hidden within the data, the 'glacier moment' when you realise that by digitising your processes and having access to real-time or near real-time data you have gained in other ways. The more accurate costing on tenders, the more efficient distribution of staff or fleets to cover seasonally busy periods, or the granular financial and marketing insights.

Bespoke Automation

Every company has its own unique workflow structure and methodology which is why Ethos offers custom automation solutions to fit.

Our team builds bespoke workflows to retrieve and collect unstructured data sending them into your IT systems for faster processing. Speak to us about running your business on Ethos Hub Bespoke solutions.

Customer Success: Roythornes

Improving client service delivery and saving staff time motivated Roythornes Solicitors to automate an inefficient legacy process

With five offices across the Midlands and East Anglia, Roythornes Solicitors offers services to private clients as well as commercial companies including property developers. Within the Real Estate team, a labour-intensive workflow is to process the reservation forms that buyers complete at the developer's sales office when buying a new-build property.

Roythornes wanted to streamline the property reservation form process to improve client experience and save time. In partnership with Ethos, their aim was to use form data extraction and workflow technology to reduce the time from receiving a reservation form to opening a file on their system by 100%.

"The legacy process was inefficient and involved re-keying of data and navigation between different systems," says Jonathan Swan, IT Director at Roythornes.

Automated data extraction solution

Ethos' account manager introduced Jonathan to Ethos Hub Bespoke, a solution offering customised business process automation. Roythornes allocated a member of their IT resource to work with Ethos automation and integration experts to build and test a proof of concept for the property reservation form.

The result is an automated workflow that cuts the processing time of each form to 5-10 minutes. "That's a significant time saving, racking up worthwhile benefits when you multiply it by the number of reservations we process each year," says Jonathan.

Bringing staff on board

The property reservation form workflow will launch with one property developer client – "we're starting carefully to build confidence in the solution and will iterate with other developer reservation forms. It's super important that we bring people with us on the digital transformation journey," says Jonathan.

"Colleagues are sure to request tweaks, but the beauty of the design is it is inherently agile," he says. "The workflow is built on strong foundations but is simple. We've not overstretched ourselves in terms of our ambitions from data extraction."

> **"By automating our workflow, we've made significant time savings on processing property reservation forms "**

Partnering with Ethos

Working with Ethos as a tech partner has also been a positive experience for Roythornes. "We had two very focused and capable teams," says Jonathan. "Our in-house developers and Ethos experts were on the same page from the outset and the synergy was immediately apparent. This was as frictionless a working relationship as you could wish for."

How to plan a successful workflow automation project

Ethos experts share their tips for streamlining a manual workflow into an effective automated process

Start small, build confidence

You may have a list of priority processes that need digitising or teams will have their own suggestions. We recommend looking for the quick wins for maximum return to the business.

By starting with a small project, you will gain the confidence of end users who may resist change. From there, you can build incrementally towards larger-scale automation. A smaller project is also quicker to develop and launch and gets result faster, proving the value of automated solutions.

Allocate resource for timely delivery

Although we know IT teams are stretched, we advise allocating a resource to an automation project to ensure a quicker turnaround time at each stage of a development project.

At the outset, we ask lots of questions about how you work, how you want to work and what types of systems, documents and data are involved in the workflow. We then design a concept, test it in a sandbox setting and work with you until everyone is confident and ready to go live.

Our survey said...

We asked IT directors for their top reasons for not starting an automation project.

They said: 'insufficient capacity to develop own solution', 'unsure which workflow to start with' and 'concerns about security'.

We can help you overcome these obstacles to streamlining workflows. Get in touch to discuss your specific needs for automation and we will develop a solution to fit.
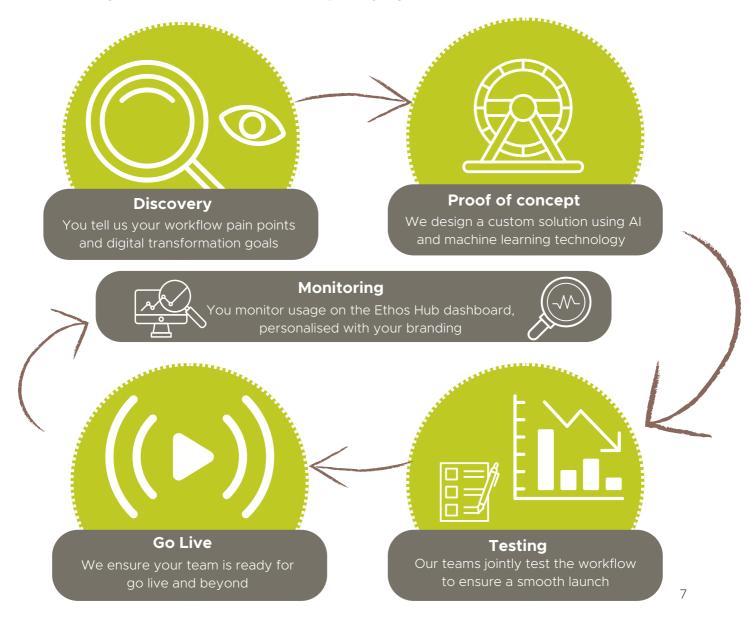
Bring teams on the change journey

Teams may like the idea of innovation and progress but resist change to their workflows, even if they are repetitive and time-consuming. The best way to manage this transition is to clearly communicate the benefits of automation for them, their productivity, and quality of work.

As soon as you can, involve your team in the process – whether it's suggesting workflows to be digitised or giving ideas for new features. Identify early adopters and get them excited about an automated workflow. Having change ambassadors within teams helps spread the message that automation is positive.

What to expect from an Ethos Hub Bespoke project

Discovery
You tell us your workflow pain points and digital transformation goals

Proof of concept
We design a custom solution using AI and machine learning technology

Monitoring
You monitor usage on the Ethos Hub dashboard, personalised with your branding

Go Live
We ensure your team is ready for go live and beyond

Testing
Our teams jointly test the workflow to ensure a smooth launch

Customer Success: Ground Construction Limited

The automation of paper-based workflows has reduced delays and increased visibility on operations, a double-win for this construction company

Ground Construction Limited (GCL) is one of the UK's largest groundworks and concrete frames businesses and operates on multiple sites at any one time.

GCL began working with Ethos in 2016 to upgrade the company's on-site printer fleet and curb unmanaged printing and toner costs. Ryan Gray, Group IT and Infrastructure Manager at GCL, reviewed all the company's processes and saw the need to streamline a paper-based workflow that records the removal of debris from sites, known as 'muck tickets'.

With GCL's 80 sites each generating between 1,000 and 8,500 loads in a few months, the paper-based system was time-consuming to process at head office and liable to error. A lost or damaged ticket could cause delays to supplier payments and site clearance.

"We looked at different off-the-shelf solutions, but none fitted how we wanted it to work," says Ryan. "We see Ethos as an innovation partner so asked our account manager to help. We started with a blank piece of paper and a year later, we launched a custom intelligent site management (ISM) system."

Data extraction solution

The ISM digitised the 'muck ticket' workflow with the site foreman using an iPad to capture the information. "The system creates a real-world experience between the construction sites and head office," says Ryan. "Any queries on tickets can be pinpointed and dealt with quicker, preventing delays to our operations."

With Ethos' support, GCL is evolving the custom ISM to manage other workflows, including concrete deliveries, and has developed a data extraction solution.

The Ethos Hub Bespoke team created a workflow to automatically extract data from email and paper delivery invoices and send it into GCL's backend systems for processing.

> **"We used to process 1,000s of paper tickets. Now automation creates a real-world experience between construction sites and head office"**

Tech solutions provider

The proof of concept for the concrete workflow took 14 days to develop as it was "bolted on" to the existing ISM, Ryan's preferred way of making incremental software changes. "No one likes too much change so it's about small steps," he says. "We get staff comfortable using the workflows then every few months we bring out updates or make slight changes."

He now finds colleagues are keen to suggest workflows to automate. "I write up a spec, give it to Ethos and within 30 days we have a new process. We have a long-term relationship that's grown from strength to strength," he says.

Get in touch

We are experts in automation and integration, providing time-saving solutions customised to your workflows.

Ethos Hub Bespoke solutions streamline processes in any business function, from finance and IT to sales, marketing and operations.

Contact us to explore how we can develop custom solutions to run your business on.

hello@ethos.co.uk   0845 609 9330

www.ethos.co.uk/process-automation