



8 pages of  
customer stories  
and expert tips

# The SMEs guide to process automation

# Executive Summary

Embark on your automation journey by pinpointing a workflow that relies heavily on manual labour.



The benefits of automating business processes include better staff satisfaction and output, fewer human errors, improved customer experience, and more compliant processes.

However, for small and medium-sized enterprises (SMEs), it may feel challenging to know where to start and risky to dedicate people and budget to developing in-house automation solutions.

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

Pinnacle 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, giving teams time to adopt it, and then expanding your digital transformation from there.

Lastly, you will find tips from Pinnacle experts on planning for a business process automation project to prepare for success.



# What are the benefits of workflow automation?

Automating workflows offers many advantages to small and medium-sized companies, including optimising the use of their greatest asset - their staff.

As businesses of all sizes gain access to increasingly user-friendly technology for automating work tasks, small and medium-sized companies should explore the potential benefits of incorporating automation into their operations.

Below are some points to ponder when evaluating how automation can enhance efficiency and productivity within your business:

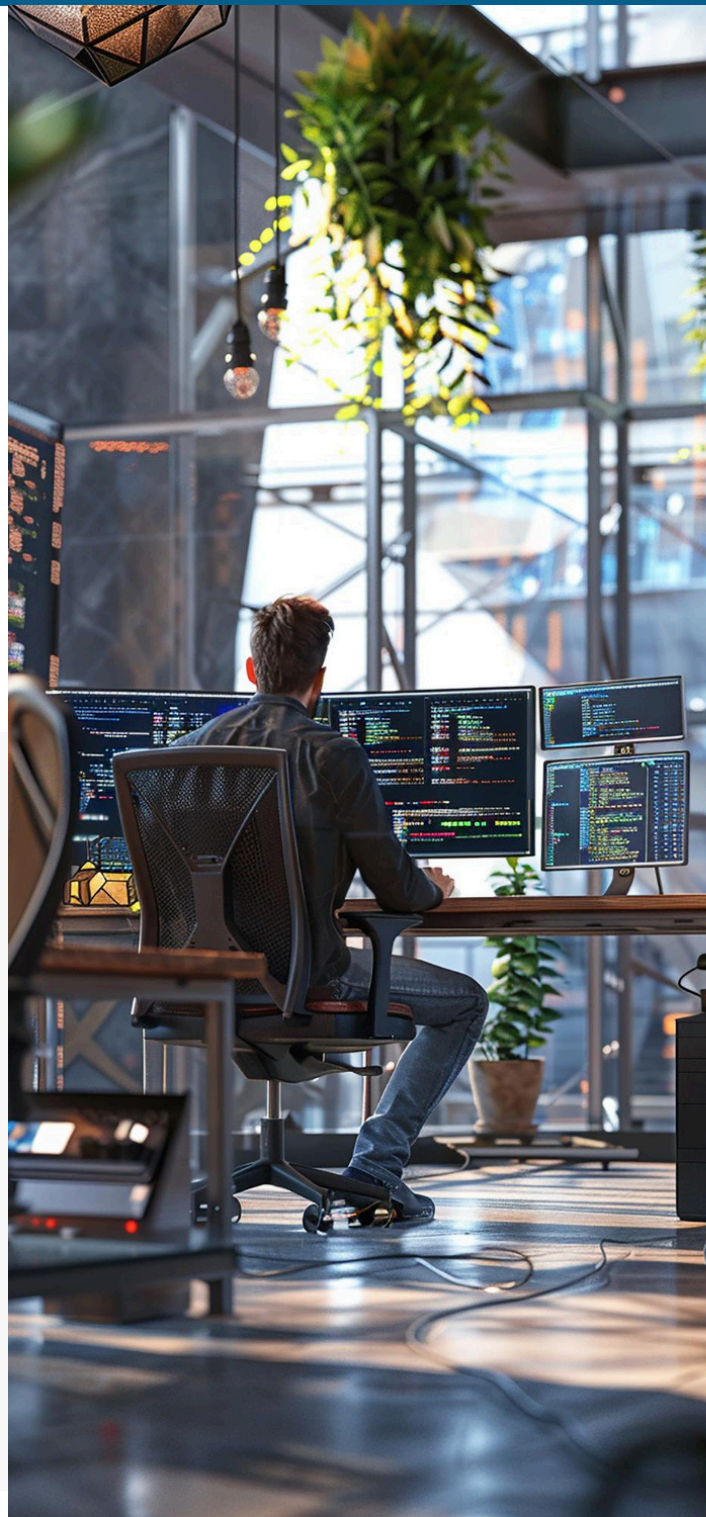


*Are we getting the most out of our people?*

*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?*



# Main Benefits to Process Automation

## 1. Maximising staffs time and expertise

At Pinnacle, we work with clients to find their hidden margins—the cost to the business of not effectively using staff time.

Using this approach, you arrive at an estimate of the gain from automating workflows. We recommend calculating the hourly value of staff time and 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 roles.

## 3. Improved Service Delivery

One benefit of automating repetitive tasks is having staff who are motivated and focused on growth, 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 begin 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 and respond to customer inquiries more quickly and efficiently.

## 2. Data Integration and Insights

A single view of how one department or function runs is critical to SMEs. When data is unstructured or semi-structured and manually processed, it may not be 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 in 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. Integrating systems with custom connectors during an automation project ensures that 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 you have gained in other ways by digitising your processes and having access to real-time or near real-time data. The more accurate the tenders cost, the more efficient the distribution of staff or fleets to cover seasonally busy periods or the granular financial and marketing insights.

## 4. Bespoke Automation

Every company has a unique workflow structure and methodology, so Pinnacle offers custom automation solutions.

Our team builds bespoke workflows to retrieve and collect unstructured data, sending them into your IT systems for faster processing. Please speak to us about running your business using Pinnacle bespoke solutions.

## Case Study

# 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 Pinnacle, 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

Pinnacle account managers introduced Jonathan to a bespoke solution offering customised business process automation. Roythornes allocated a member of their IT resource to work with Pinnacle 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 Pinnacle

Working with Pinnacle 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 Pinnacle 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

Pinnacle 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 needing digitising, or teams may have suggestions. We recommend looking for 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 results 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 development project stage.

At the outset, we ask many questions about how you work and 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.

## 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 communicate the benefits of automation for them, their productivity, and the 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 **Pinnacle Bespoke** project



### Discovery

Tell us what your workflow pain points and digital transformation goals are



### Proof of Concept

We design a custom solution using AI and machine learning technology



### Testing

Our teams jointly test the workflow to ensure a smooth go live experience



### Go Live

We ensure your team is ready for the go live rollout and ongoing support



## Case Study

# Customer Success: GCL

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 Pinnacle 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 Pinnacle 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."*

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

The Pinnacle 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 Pinnacle and within 30 days we have a new process. We have a long-term relationship that's grown from strength to strength,"* he says.

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

Pinnacle's 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.



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