



# Identify Quick Wins and Improve Productivity in 2026

Quickly identify where automation can save time, reduce errors and improve efficiency.

## **Introduction**

Automation is becoming a core driver of productivity, with 28% of organisations reporting improved productivity and 25% benefiting from automating repetitive tasks, enabling faster workflows and scalable growth without additional resources.

## **How to Use this Checklist**

Work through each section in order.

Start by identifying problem areas, assessing how they impact your operations, then prioritising and defining your next steps.

## 1. Identify High-Impact Processes

Where is automation likely to deliver the biggest gains?

Tick any statements that apply to your current processes:

We rely on manual approvals (for example, finance, HR or operations)

Tasks are delayed due to unclear ownership

Data is entered multiple times across systems

We have repetitive, rule-based processes

Teams spend significant time on admin tasks

Customer onboarding feels slow or inconsistent

Processes are managed primarily through email

## 2. Assess Workflow Efficiency

Where are the bottlenecks and inefficiencies?

For the processes identified above, assess how they are performing today:

Processes take longer than expected

Delays occur between steps or approvals

Errors happen due to manual data entry

We lack visibility of process status

Work is duplicated across teams

Reporting is manual and time-consuming

### 3. Prioritise Quick Wins

Which processes should you automate first?

Review the processes you identified and tick the statements that apply:

- High-volume and repetitive
- Time-consuming for multiple team members
- Error-prone or inconsistent
- Impacts customer experience
- Follows clear, rule-based steps

Based on the above, how would you prioritise this process?

Priority Level:

Low Impact                      Medium Impact                      High Impact

Tip: If you selected three or more boxes above, this is likely a high-impact automation opportunity.

## 4. Evaluate Automation Readiness

Are you ready to implement automation?

Before moving forward, assess your current capability:

Systems can be integrated or connected

We use Microsoft 365 or similar platforms

Processes are clearly defined

Ways of working are consistent

There is ownership for improvement

We are open to AI-driven tools

## 5. Define Next Steps

Turn insight into action

Use your findings to create a simple starting plan:

Identify 1–3 processes to automate first

Map current workflows step-by-step







Highlight delays and manual effort

Define success metrics (time saved, accuracy, speed)

Explore tools such as Microsoft Power Automate

Consider expert support

## What You Can Expect

-  Faster processes and reduced delays
-  Less time spent on repetitive admin
-  Improved accuracy and fewer errors
-  Better visibility across workflows
-  Productivity improvements of up to 25%
-  Ability to scale without increasing headcount

## Frequently Asked Questions

### **What should we automate first?**

Start with repetitive, time-consuming processes that create delays or errors.

### **Do we need technical expertise?**

No. Many automation tools are designed for business users and can be implemented gradually.

### **How quickly will we see results?**

Many organisations see improvements within weeks, particularly in time savings and efficiency.

## Ready to take the next step?

- Identify your biggest opportunities and turn them into measurable results.
- Pinnacle helps SMEs streamline workflows, reduce manual effort and build more efficient, scalable operations.
- Book an [automation review](#) and let us help you get started.

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