



Building What's Next.

SELF-ASSESSMENT TEMPLATE

Process & Automation Opportunity Finder

Work out where your time actually goes, which tasks are worth automating, and what it would be worth to fix them.

ORGANISATION

COMPLETED BY

DATE

BEFORE YOU START

The work that costs most is rarely visible.

Nobody sends an invoice for the four hours a week someone spends copying figures between two systems. That is precisely why it continues for years.

Most businesses know roughly where their friction is. Someone will say “the month-end is a nightmare” or “we spend half of Monday chasing approvals”. What they usually cannot do is put a number on it – and without a number it never gets prioritised against the things that do have invoices attached.

This template turns that vague frustration into something specific: a list of tasks, the hours they consume, and a ranking of which are actually worth fixing first.

This is yours to complete. No technical knowledge is needed. The people who fill it in best are the ones doing the work – so it is worth asking two or three colleagues to contribute rather than guessing on their behalf. Print it and write on it, or fill it in on screen.

Be specific and be honest. “Admin” is not a task; “re-typing supplier invoices into the accounts system” is. If you do not know how long something takes, estimate, then check by timing it once. Estimates are fine at this stage. Vagueness is not.

By the end you will have a shortlist of candidates with hours attached, and a clear sense of which are quick wins and which need more thought. That list is useful whether or not you ever automate anything.

ONE WARNING UP FRONT

Automating a process you have not examined simply makes a bad process faster and harder to see. Section Five deals with this directly – some of what you find here should be simplified or stopped, not automated.

WHAT THIS TEMPLATE COVERS

01 Where the time goes

02 The tell-tale signs

03 Systems & re-keyed data

04 Scoring the opportunities

05 What not to automate

06 Your top three candidates

THE PRINCIPLE

Fix the process first, then automate it

The tool depends on the problem. Most of what a business needs is smaller and simpler than it expects.

There is a tendency to think of automation as a large project requiring bespoke software. In practice, the majority of what frustrates a business day to day is solved with something modest: a form instead of an email, a list instead of a spreadsheet, a notification instead of someone remembering to check.

Four questions decide whether a task is a good candidate. Keep them in mind as you work through the sections.

01 Does it happen often?

A ten-minute task done daily costs far more per year than a two-hour task done twice. Frequency matters more than duration.

02 Are the rules consistent?

If the steps are the same every time, it is a strong candidate. If it requires judgement on every case, automation will help only at the edges.

03 Does an error cost you?

Re-keying data is where mistakes enter a business. Sometimes the value is not the time saved but the errors avoided.

04 Is anyone waiting on it?

Delay has a cost of its own. A quote that takes three days because it sits in an inbox may lose work you never hear about.

WORTH KNOWING

Many organisations already own Microsoft Forms, Lists, SharePoint and Power Automate but only ever use Outlook and Teams. The first question is usually not what to buy, but what you are already paying for and not using. **Availability depends on your Microsoft 365 licence.**

SECTION ONE

Where The Time Goes

List the repetitive tasks your business does. Not projects – the recurring work that happens whether anyone plans it or not.

Be specific about the task and generous about who does it. Include the ones people have stopped complaining about, because those are often the most entrenched.

TaskWho does itHow oftenMins each timeMins / month

PROMPTS, IF YOU ARE STUCK

Think about: month-end and reporting; quotes and orders; approvals and sign-off; timesheets and expenses; onboarding a new client or member of staff; producing the same document repeatedly; anything involving the phrase “and then I email it to”.

SECTION TWO

The Tell-Tale Signs

These patterns almost always indicate an opportunity. The more you recognise, the more there is to gain.

Is the same information typed into more than one system?

An order entered in email, then a spreadsheet, then the accounts package. Re-keying is the clearest signal there is.

☐ YES ☐ NO ☐ UNSURE

Do approvals happen by email?

Requests sitting in inboxes, chased manually, with no record of who approved what or when. Manual approvals are also far harder to audit than automated ones.

☐ YES ☐ NO ☐ UNSURE

Is a spreadsheet being used as a database?

Several people editing it, versions emailed around, and nobody certain which copy is current.

☐ YES ☐ NO ☐ UNSURE

Does someone spend time chasing people for updates?

Status chasing is pure overhead. It exists because the information is not visible anywhere.

☐ YES ☐ NO ☐ UNSURE

Are documents assembled by hand from a template each time?

Quotes, contracts, reports and certificates where only a few fields actually change.

☐ YES ☐ NO ☐ UNSURE

Does anyone produce the same report on a schedule?

Weekly or monthly figures exported, formatted and circulated by a person rather than a system.

☐ YES ☐ NO ☐ UNSURE

Do things get missed because nobody was reminded?

Renewals, follow-ups, inspections, review dates. Memory is not a process.

☐ YES ☐ NO ☐ UNSURE

Do you rely on a paper form, or a PDF that gets printed?

Often a five-minute job to replace, and it removes the re-typing at the other end.

☐ YES ☐ NO ☐ UNSURE

Has someone built a personal workaround to cope?

A private spreadsheet, a rules-based inbox, a notebook. These are the real process, undocumented.

☐ YES ☐ NO ☐ UNSURE

SECTION THREE

Systems & Re-Keyed Data

Where information is retyped, two systems that should be connected are not. Map those handovers.

SYSTEMS IN DAILY USE

SystemWhat it holdsWho uses it

WHERE DATA IS MOVED BY HAND

FromToHow oftenWho does it

Do you have Microsoft 365?

If so, tools for forms, lists, approvals and automation are likely already included in what you pay.

☐ ☐ ☐
YES NO UNSURE

Do your main systems offer any integration?

Many line-of-business packages have an export, an API or a supported connector nobody has looked into.

☐ ☐ ☐
YES NO UNSURE

Is any data only in one person's files or inbox?

Information held personally cannot be automated, reported on, or found when that person is away.

☐ ☐ ☐
YES NO UNSURE

SECTION FOUR

Scoring The Opportunities

Bring your tasks from Section One here and score each one out of three on the four factors below. The point is to rank, not to be precise.

TIME

Minutes per month, from Section One. 1 = under 60, 2 = 60–240, 3 = over 240.

CONSISTENCY

Are the steps the same each time? 1 = varies a lot, 2 = mostly, 3 = identical every time.

COST OF ERROR

What happens if it goes wrong? 1 = little, 2 = noticeable, 3 = money or reputation.

INTERRUPTION

Does it break concentration repeatedly? 1 = rarely, 2 = a few times a day, 3 = constantly.

That last factor is easily underestimated. A task that takes two minutes but happens twenty-five times a day — “where is this order?” — can cost a business more than one long admin job, because nobody ever settles into concentrated work.

TaskTimeConsistencyCost of errorInterruptionTotal

READING YOUR SCORES

10–12 start here; these are usually straightforward and pay back quickly. **7–9** worth doing, but look at the process itself first. **4–6** leave for now — the effort will outweigh the return, unless the task is genuinely painful for whoever does it.

SECTION FIVE

What Not To Automate

The most valuable finding in this exercise is sometimes that a task should stop, not speed up.

Automation makes a process faster and more consistent. It does not make it sensible. A report nobody reads, produced automatically, is still waste – only now it is invisible waste that runs forever without anyone questioning it.

Before automating anything on your list, ask the four questions below. They routinely remove items from the list entirely, which is a better outcome than automating them.

Does this task still need to exist?

Some work continues because it always has. Ask who uses the output, and what would happen if it stopped.

☐ ☐ ☐
YES NO UNSURE

Is the process itself sound?

If the steps are convoluted, simplify first. Automating a tangle preserves the tangle in code.

☐ ☐ ☐
YES NO UNSURE

Does it need human judgement?

Where discretion, negotiation or care is involved, automate the admin around it and leave the decision with the person.

☐ ☐ ☐
YES NO UNSURE

Is it about to change anyway?

If the system, supplier or regulation behind it is changing this year, wait. Build once, not twice.

☐ ☐ ☐
YES NO UNSURE

Do people deliberately bypass this process?

If staff route around it, understand why first. Automating a process people avoid simply makes the workaround permanent.

☐ ☐ ☐
YES NO UNSURE

TASKS TO STOP OR SIMPLIFY INSTEAD

TaskStop or simplify?Who decides

A NOTE ON AI

The same logic applies to AI. Microsoft Copilot can help with drafting, summarising and finding information, but it works best on top of well-organised data and a process that makes sense. It is a capability to apply deliberately, not a substitute for fixing the underlying work.

CHOOSING AN APPROACH

Four ways to fix a process

Listed from simplest to most involved. Start at the top and only move down when the simpler option genuinely cannot do the job.

Use something you already own properly

A shared list instead of a spreadsheet, a form instead of an email, files in one place instead of five. Costs nothing beyond a little setup and solves a surprising amount. Always check here first.

Automate the steps between systems

A Power Automate flow that routes an approval, sends a reminder, files a document or copies data so nobody has to. Usually the highest return for the least effort, and invisible once running.

Build a simple application

A Power App for capturing and managing information the way your business actually works – job records, inspections, requests, assets. Right when a form is not enough but a full system is too much.

Extend what you have further

Where the standard tools cannot deliver the experience needed, the Microsoft environment can be extended with a custom interface. The least common answer, and the one to reach for last.

MATCH YOUR CANDIDATES TO AN APPROACH

TaskLikely approachOpen question

SECTION SIX

Your Top Three Candidates

Take your three highest scores and write them up properly. This page is the one worth sharing with anyone you ask for help.

CANDIDATE ONE

TASK

HOURS / MONTH NOW

REALISTIC SAVING

WHO BENEFITS

CANDIDATE TWO

TASK

HOURS / MONTH NOW

REALISTIC SAVING

WHO BENEFITS

CANDIDATE THREE

TASK

HOURS / MONTH NOW

REALISTIC SAVING

WHO BENEFITS

TOTAL ACROSS ALL THREE

HOURS PER MONTH

HOURS PER YEAR

ROUGHLY WORTH

MAKING SENSE OF IT

Where you stand

Count the tell-tale signs you answered “yes” to in Section Two. That number says more about the opportunity than the size of your business does.

0 – 2 signs

Your processes are in good order. Look for single high-value tasks rather than a broad programme of change.

3 – 5 signs

Typical, and the sweet spot. There is usually a fortnight of work here that pays back within months.

6 or more signs

Significant time is going into work that need not be manual. Resist fixing everything at once – do the top-scoring one properly first.

Mostly unsure

Ask the people doing the work. They will know within minutes, and being asked is usually welcome.

THREE THINGS WORTH DOING NEXT

Check what your Microsoft 365 licence already includes

Many businesses pay for automation and reporting capability they have never switched on. This costs nothing to establish.



Pick one task and time it honestly for a week

A single measured task turns opinion into evidence, and makes the case for the rest far easier.



Ask the people doing the work what they would change

They usually know exactly where the waste is, and are rarely asked. Start there, before considering any tool.



A REALISTIC EXPECTATION

Automation rarely removes a role. What it reliably does is give people back the part of their week they lose to work a system should be doing – usually the part they least enjoy and the business least benefits from.

THE SHAPE OF THE WORK

How a process actually gets fixed

Good automation work follows a recognisable sequence. Knowing it helps you judge whether a proposal you are given is complete – and note how much of it happens before anything is built.

01

Understand the task

Watch it being done once, by the person who does it. Almost every process contains a step nobody mentions when describing it.

02

Simplify it

Remove what is unnecessary before building anything. This step alone often delivers most of the benefit.

03

Design the flow

Agree what happens, who is involved, what gets recorded, and what should happen when something is refused or goes wrong.

04

Build it small

A first working version covering the common case, using tools you already own wherever possible.

05

Test with real work

Run it alongside the manual process for a short period. Real cases expose the exceptions no design meeting predicts.

06

Roll out and train

Move everyone across with a short explanation of the new way. Adoption fails far more often than technology does.

07

Measure and adjust

Compare against the hours you recorded here, then refine or move on to the next candidate on your list.

ON EXPECTATIONS

Most worthwhile improvements are small and quick rather than large and transformative. A handful of modest changes, each saving a few hours a month, compounds into something significant – and carries far less risk than one large project.

NEXT STEPS

You now have hours attached to problems that had none.

That is the hard part, and it is worth keeping regardless of what you do next. A task with a number beside it can be prioritised; a vague frustration cannot.

If you would like a second opinion on your top three – whether they are worth doing, what they would take, and whether you already own the tools – we are happy to talk it through. No commitment, and no obligation to have us build anything.

And if the honest answer is that a process needs simplifying rather than automating, we will say so.

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