MENZIES
BRIGHTER THINKING

DIGITAL TRANSFORMATION

PROCESS DOCUMENTATION SERVICE

Documenting your processes ensures you have a single source of truth for your staff to refer to in order to understand how things are done at your business, and promote a consistent work output.

By documenting, visualising and analysing existing workflows, businesses can pinpoint bottlenecks, inefficiencies, and opportunities for automation and digitalisation.

We'll spend 90 minutes documenting each process using **Spark's** process mapping functionality to record the process input, output, activities, responsibilities, and systems used.

Examples of individual processes include: pay runs, stock management, payroll, project management, employee expense management, sales/invoicing, prospecting / business development, and purchasing.

Add (optional)

QUANTIFYING VALUES

We will record the staff time spent on each process to help you: understand how much it costs to perform the process, understand role utilisation, identify bottlenecks and simulate different scenarios.

Choose either:

RECOMMENDATIONS LITE

- Fastest option - up to 48 hours turnaround.

- Provides direction on which tech systems suit your industry based on top-level discussions to date.

- We'll recommend/introduce up to 1-3 companies for you to speak with to fully evaluate if their system meets all your requirements.

- We will spend a maximum of 3 hours reviewing your process map and conducting any required software research.

NB: These recommendations are completed without conducting a full process map analysis. Therefore, the recommendations are less specific than what we provide with the **"RECOMMENDATIONS EXPERT"** package. As a result, you will need to spend more time on evaluation.

Or

RECOMMENDATIONS EXPERT

- Up to 2 weeks turnaround.

- Full analysis of process maps to review: risks, bottlenecks, opportunities for improvement, and requirements.

- Translate the above into functional requirements (product features). We will ask you to assign a number 1-5 to each feature to record its importance to you.

- We will research and evaluate several applications.

- We will provide a full recommendations report detailing your objectives, findings from the process mapping session/s, and the evaluation outcome. Using our scoring system, we will explain which system is best suited to your requirements.

- If you purchased the quantify add-on, we will provide an estimate of time/costs that will be saved by implementing our recommendations, as well as a ROI.

FURTHER OPTIONAL SERVICES

- Arranging custom software demos
- Conducting software testing with your workflows
- Project management
- Supporting the build of business cases

- Implementation of software and integrations
- Change management
- Training
- Documentation of new processes
- *Extra research time may come at an additional cost

DIGITAL TRANSFORMATION IN ACTION

ENHANCING EFFICIENCY FOR A RECRUITMENT BUSINESS FOLLOWING PERIOD OF HIGH GROWTH

THE CLIENT:

The client recruits media staff for two of their primary clients. They had recently begun offering to manage the payroll of these staff and that service would become successful.

KEY CHALLENGES:

A period of hyper growth had resulted in the client reaching a stage where their systems and processes no longer worked for them. Everyone was "firefighting". The client manages recruitment and payroll in four different countries, each with different processes, systems, and bank accounts, as well as manually sharing data with their various business systems. There were several people in the business considered experts in various subjects. Unfortunately, this meant that business could be halted when colleagues had questions, and the SME wasn't available.

SOLUTION(S) PROVIDED BY MENZIES

We spent a day on-site with around 8-10 staff documenting the various payroll and customer onboarding processes and the problems with each. We also led an interactive workshop whereby we asked various questions, such as: "What is the biggest bottleneck to your working day?" and "If you had more time in your working day, what would you do with it?"
We then analysed the documented processes for risks and opportunities for improvement, before examining the responses to the workshop questions. This allowed us to provide a recommendations report that considered both facts and feelings. Our recommendations considered not only how the proposed changes would impact the running of the business, but also the wellbeing of the staff.

The recommendations and implemented changes, included:
- Exploring a Midoffice integration with Xero to reduce manual data entry
- Set a rule where clients provided completed/approved timesheets
- Implementing Airwallex, a Xero integrated FX solution to save money on fees and automate posting of transactions into Xero
- Exploring document signing integrated with their CRM
- Implementing a universal timesheet system so that, regardless of region, all timesheets are in the same format which opens up opportunities for automated reporting and eliminating manual error

OPTIMISING INVENTORY MANAGEMENT: IMPLEMENTING 'UNLEASHED' FOR FOOD & DRINK MANUFACTURERS

THE CLIENT:

A B2B business that has recently opened their UK branch.

KEY CHALLENGES:

The client required a system to track stock levels, purchases, sales, and production. They decided that they wanted to focus on assessing the inventory software, Unleashed.

SOLUTION(S) PROVIDED BY MENZIES

We used a cloud-based process mapping software called Skore to map out our client's purchasing and stock management processes, staff roles, and the current systems used by the company. With our knowledge, we then demonstrated how Unleashed, (a Xero-integrated supply chain management software) fits into these processes and answered any questions the client had regarding the software.

DIGITAL TRANSFORMATION IN ACTION

SAVING TIME AND RESOURCES THROUGH AUTOMATION : STREAMLINED SOLUTIONS FOR A B2C JEWELLERY RETAILER

THE CLIENT:

A successful B2C retailer with complex accounting using Shopify (eCommerce platform) and Mintsoft (warehouse management) for fulfilment and Xero.

KEY CHALLENGES:

The client's manual processes resulted in a considerable amount of time being spent by the team each month. Hours were spent manually transferring Shopify data into Xero, as well as into various spreadsheets for reports, such as sales by country.

SOLUTION(S) PROVIDED BY MENZIES

A2X is a connector that shares data between retail marketplaces (such as Amazon and Shopify) with the businesses accounting software (such as Xero, Quickbooks, and Netsuite). It posts summarised payouts to the accounting software that are split into areas such as sales revenue, tax, shipping costs, refunds, and payment gateway fees.

We implemented A2X to save the team time on manual data entry and allow them to focus on more interesting work. This enabled consolidated Shopify payouts to be automatically sent to Xero. The consolidation reduces the volume of transactions going through Xero which increases the speed of its UI. With accurate payout data being posted, we created regional sales accounts in Xero to enable the automated sales reporting at a click of a button.They also required a stock management system as they don't currently know what they have on hand, and therefore aren't able to optimise purchasing in line with demand. They wanted the system to hold supplier and product information to connect with purchasing so that when a purchase order is raised, it can be automatically populated with SKU codes and descriptions rather than finding the information from order history and typing it out manually. We therefore evaluated inventory software, Unleashed, and subsequently provided training.

STREAMLINING ACCOUNTS PAYABLE FOR A GROWING SELF-STORAGE BUSINESS

THE CLIENT:

A company of 9 self-storage sites that are rapidly acquiring more.

KEY CHALLENGES:

With the company's recent acquisitions, the accounts payable process had become manual and disorganised, with inaccurate accounting entries occurring often. As a result of this, the Purchase Ledger Clerk felt overworked and required a solution.

SOLUTION(S) PROVIDED BY MENZIES

We introduced a purchasing management platform called Lightyear, which enabled staff from various sites to raise purchase orders on one central system and have a cloud based and automatic approval workflow triggered with each PO. Having a central system enabled the Purchase Ledger Clerk to view purchase order and invoices for any site without having to manually chase individuals. This automation meant that the entries posted to Xero would always be correct.

We also introduced a payments solution called Crezco to automate pay runs. The new system would import unpaid bills from Xero and automatically prepare a draft pay run and follow the customised approval workflow. Payments would be made without the need for BACS. As a result, we helped the client save an average of 3 hours per week.