

Wubbleyou

Building Smart & Efficient Software Systems

@WubbleWeb 

DIY Digital Transformation: Crash Course

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1. Preface

With the onset of **COVID19**, and the sudden requirement for the majority of the businesses and its people to work remotely, we find ourselves in uncharted territory as people, businesses and as a country. **Business must adapt to this, or risk suffering business critical issues.**

Many businesses are theoretically capable of remote working, but are not geared up to allow for that, and are either at panic stations or operating less efficiently.

Some others may be capable of remote working, but now have more time on their hands to look inwards and improve, poising themselves to be in a stronger position when this passes.

Why should I read this?

The purpose of this document is to allow an organisation to self-assess their position, set out a plan and take meaningful action to be a better business via digital transformation.

We understand this is a daunting task at the best of times, but this is a marathon and not a sprint, and the sooner we start the better.

[Wubbleyou](#) is uniquely placed to reflect and provide thought on this topic. We:

- Provide business process automation to our clients as a service, generally getting a new product off the ground, or building custom software to automate internal processes. We understand what this involves
- Are a scaling business ourselves, we have averaged a 50% year on year growth over the last 3 years, and understand the steps we must (and do) take to ensure this is an area of strength for us – we must practice what we preach

Internally, we have a high-level objective which is part of our strategy – “If the office were to burn down right now with everything in it, could we be operationally ready within 4 hours?”. COVID19 partially tested this for us, when we made the snap decision to close the office and put the whole team remote, with no lingering operational impact.

Is this for my business?

If you are in immediate crisis or survival mode, the answer is no – the ship must first be stabilised. However, if you’re able to operate or tread water, however clunky that may feel, you’re in as good of a position as any to start. Perfect timing rarely exists, so it’s best just to get going.

Ultimately, the goal is to save you time, money and ensure business continuity.

2. Categorising my business

First, we must grade ourselves into each of these broad categories to gauge how we're able to move forward:

- **Adoption of technology & automation of processes:**
 - o **Nil:** Paper dominates all key processes
 - o **Low:** There is little paper, but most process' are still largely manual, with a high degree of reliance on tools like excel, or email to manage processes. If a staff member's device were to stop working, it will create significant operational impact
 - o **Moderate:** Most, if not all day to day operation is using a collection of digital solutions, and there is little to no friction when a user must work remotely or use a new device. Paper in the business is culturally seen as a hinderance. However, data is in silos, software does not always talk with each other and the process to move data amongst software is not fully automated
 - o **High:** A team member is onboarded easily, and may work from any location or from any approved device without issue. The manual steps in processes which can be automated, have been automated. All software is connected in a way which ensures that no data is siloed, and that there are no requirements for a person to manually move data from one place to another
- **Use of data to drive decision making:**
 - o **Impossible:** The data to do this is for the most part not collected, thus, it is not possible to do
 - o **Low:** The data is accessible, but largely not used. An example might be that an accounting software is used which collects information in detail to file yearly accounts, VAT returns etc, but the data is not analysed to make future decisions
 - o **Moderate:** Some evidence-based decision making is undertaken based on collected data, but this reporting is either not automated, or not consistently applied across all business functions
 - o **High:** Using data to make evidence-based decisions is culturally ingrained throughout the organisation, and is prevalent throughout all business units. Furthermore, all reporting is automated so that high level KPIs are accessible in near real time
- **Continuous Digital Improvement:**
 - o **Nil:** There is no drive, and there has been no progression for some time. Competitors & customers are consistently using new technology which we have not adopted

- **Low:** We adopt new technology, but tend to do so much later than our customers/competitors
 - **Moderate:** We adopt and embrace new technology, and are always open to new approaches. However, this is generally in a reactive way, and not in a structured nor strategic fashion
 - **High:** We actively seek out technology which will suit our immediate needs as they arise, and consider technology when we plan for the future. We have a culture of challenge and questioning our own technology and it's use, and there is a drive to continuously assess our technology, and our processes, to see how they could be more automated, effective and allow us to better serve our customers. If we can't find a solution which fits, we'll make our own
- **Process documentation:**
- **No Documentation:** There is no documented way to approach key processes within the business, and there is a lack of consistency in how the key business activities are achieved
 - **Low:** Some templates exist to allow for some consistency, or work has been started on process documentation, but key processes are still missing
 - **Moderate:** Key processes are documented, but contribution is not uniform throughout the business, for example, the directors have made most of the contribution
 - **High:** All key processes are documented, as well as a number of secondary processes. There is a concerted effort and drive across the organisation to document processes as they arise, and improve existing processes as these improvements become apparent. It is easy for any team member to suggest a change in process (with the correct approval process)

Impact

Any business which is not able to self-rate with a **blue** in each category is likely to benefit from a digital transformation strategy.

Red or **amber** category businesses:

- Are at significant risk of being outcompeted over time. Standing still is naturally falling behind, as the rest of the world drives forward

- Are at significant risk of a sudden and painful cessation of business due to a [black swan](#) event like COVID19 (assuming that the business is theoretically capable of operating under these circumstances)

Business' in the **green** categories may well run successful and profitable business', but may also struggle to maintain pace with any key competitor which is really embracing and executing a digital strategy, like those in the **blue** camp.

Business' in the **blue** camp are likely seen as more progressive, and are finding ways to innovate within their industry.

These improvements compound over time, so catching up to a competitor is far more difficult than maintaining pace.

3. Ok, but how do I create and execute a strategy?

3.1. Set a direction

It's important to take a step back and understand where you are now, Vs where you want to be. Consider the following questions to help you to create objectives which effects meaningful change:

- Where do you rank in the categorisation sections above?
- What does success look like? How will you measure that?
- What are the current pain points in your business?
- What will your business look like if you eliminated these pain points?
- Do you have your current processes mapped & documented? Is this documentation used? Would automating these generate a ROI?
- Are your processes enforced via software? Is it easy to make a mistake in any of your processes, or bypass key gate checks?

Once this is known, you understand what to point the cannon at, and have a checklist of items if when resolved create a positive impact for your business. Hitting these proves the strategy is working.

Prioritise this list of pain points and successes based on what will create the most impact and help you achieve your success criteria most quickly.

Ensure that you:

- Bring in key members of staff from every business unit. A management team are capable of setting a direction and KPIs, but it's the people on the coal face who understand the pain points best, and will provide actionable feedback based on their experience
- Encourage, empower and champion enthusiastic members of staff. These people are your early adopters and are crucial to converting and onboarding the rest of the team
- Envisage where you want to be, not just where you are now

3.2. Understand your current pain points

3.2.1. Why?

Your current pain points are areas which you know are clunky or obstructive. They likely cost you time or money and happen repetitively, and may impede your high level objectives.

Leaving these to go unresolved will allow them to build up over time, leading to a situation of firefighting short-term problems without enough time to implement long term solutions. It's important to tackle these before reaching that critical mass and suffer death by 1000 cuts.

You and your team likely have a good understanding of some of these just working on intuition, so start by noting these down.

3.2.1. How?

We have compiled a spreadsheet format to allow you to collect and rank the impact of these pain points [here](#).

Consider the potential pitfalls in the following areas, are any of the below relatable in your business, and do they create a relatable pain point?

- **Adoption of technology & automation of processes:**
 - o Is there the use of any paper within the organisation? How does this impact efficiency? Does this create risk if that documentation were to be destroyed?
 - o Are files stored directly on a staff member's computer, and only on that computer? What would be the consequence if that device were lost, stolen or destroyed? Is it jarring to share these documents and manage change control?
 - o Are you required to create any reports, or move data between systems? Is this a manual and time-consuming task?
 - o Are any tasks error prone? What are the consequences if a mistake were to be made?
 - o Is it easy to onboard/offboard staff into/out of the business? How do you manage their credentials and access to key documentation/software?
 - o Culturally, do team members embrace technology?

- **Use of data to drive decision making:**
 - o Are you able to base decisions on data/evidence?
 - o Is data hard to gather, unreliable, or out of date by the time you gather it?
 - o Are KPIs set to determine the health of key business activities, and are you able to track these often enough to make course corrections when required?
 - o Are you able to make a change to effect a positive impact on a KPI, and directly correlate the change to a positive/negative impact on the KPI?
 - o Culturally, is assumption understood? and is it generally understood when a decision is being made on assumption rather than evidence?
- **Continuous Digital Improvement:**
 - o Is change welcome within the business?
 - o Is technology seen as an imposter/hinderance, or a key driver to success?
 - o In terms of your use of technology, do you rank ahead/behind our competitors/customers? Does this cause friction?
 - o Do you seek out new technology to solve issues as they arise? Do you understand future barriers and how you'll use technology to help circumvent these?
- **Process documentation:**
 - o Do people ever/often do things the 'wrong way'? Is there a clear & accessible process to detail the 'right way'? Is process documentation followed?
 - o Do templates exist for any repetitive or important documentation? E.g. proposal documents, engagement emails, contracts etc, are these stored in a way which makes them easily reusable, or better yet, used in an automated way?
 - o Is there a clear & accountable plan for business units to document key undocumented processes? When a process which is identified and not documented, is this then logged to be documented, if it is important enough?
 - o Is any team member able to easily and quickly suggest a change to a process, with an approval process to assess if it will be a positive change for the business?
 - o Are processes challenged/updated regularly? Is the creation and challenge of process led from the top, and followed by all?

Once you have mapped your pain points, you're now in a position to prioritise these and determine which pose the largest risk, or offer the largest financial benefit to solve.

You may have a large list, but don't worry, that just means you've been thorough and that there is lots of opportunity to be more efficient. What's important is to have realistic expectations on how fast you're able to resolve these. Remember, it's a marathon not a sprint.

Also consider, have you identified any current activities which have no impact if you stop doing them? If so, you should stop these activities and investing the time into improvement.

3.2.2. Map & document your current processes

With a priority of pain points/processes, you need to map the important and urgent items in this list so that you're able to correctly implement a long-term solution to resolve the pain point.

Where a process exists across most businesses (e.g. HR items like holiday requests, or finance items like invoicing or purchase orders), consider how you're able to use boiler plate processes or policy to save you time. You'll be able to adjust these to better fit your needs.

Where you must cut your own path, you will need to document this yourselves. To do this, you will need:

- Approx 2 hours of time per key process (although set your own benchmark after completing a few)
 - o Make this as distraction free as possible, ignore calls/emails where possible
- The key team members involved in the process
- A collaborative method to build the process, one of the following will work:
 - o A good old whiteboard (when physical presence is permitted)
 - o A shared online whiteboard such as <https://miro.com>
 - o If you're building this alone, and want some free software, use <https://www.draw.io>

There are several ways to document a process, but we find the combination of a flow diagram and written steps tend to work best.

3.2.2.1. For each process, capture in a written format

- **The name of the process**
- **Why you do this process? What happens if you don't?** This makes it easier for others to buy into the process, and understanding 'the why' allows the person to ensure the core purpose is met when they carry out the process, rather than just going through the motions
- **For each step of the process, record:**
 - o How to complete this step of the process
 - o How to make decisions if required
 - o Are there any 'gotchas', things which could go wrong which you could document? These are important as they allow someone new to the process to resolve the issue quickly and efficiently, rather than become immediately blocked in a potentially precarious point in the process

A process doesn't need to be massive, for example, the steps for annual leave could be minimal with the right software, e.g.:

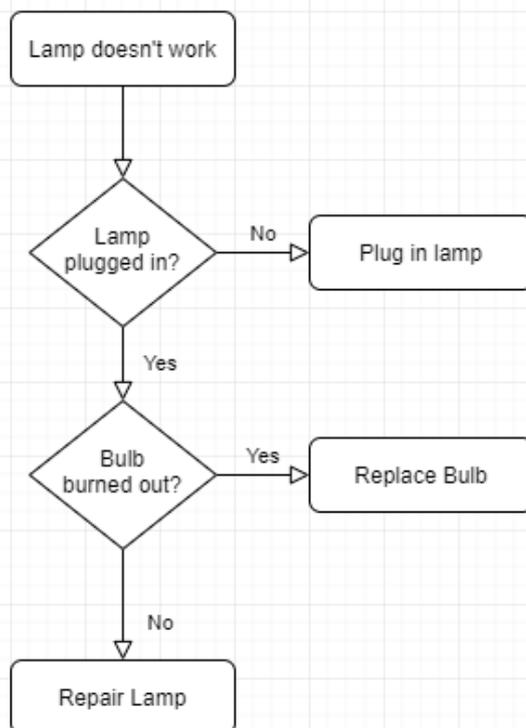
1. *Using timetastic, select the days you'd like to request on leave, please do this as early as possible*
2. *If the leave is not approved within one week, please email your line manager for information*
3. *If the leave is approved/not approved, you will be notified by Timetastic*

3.2.2.2. If you feel necessary, for each process capture as a diagram

- Each step/decision
- The person responsible for that decision

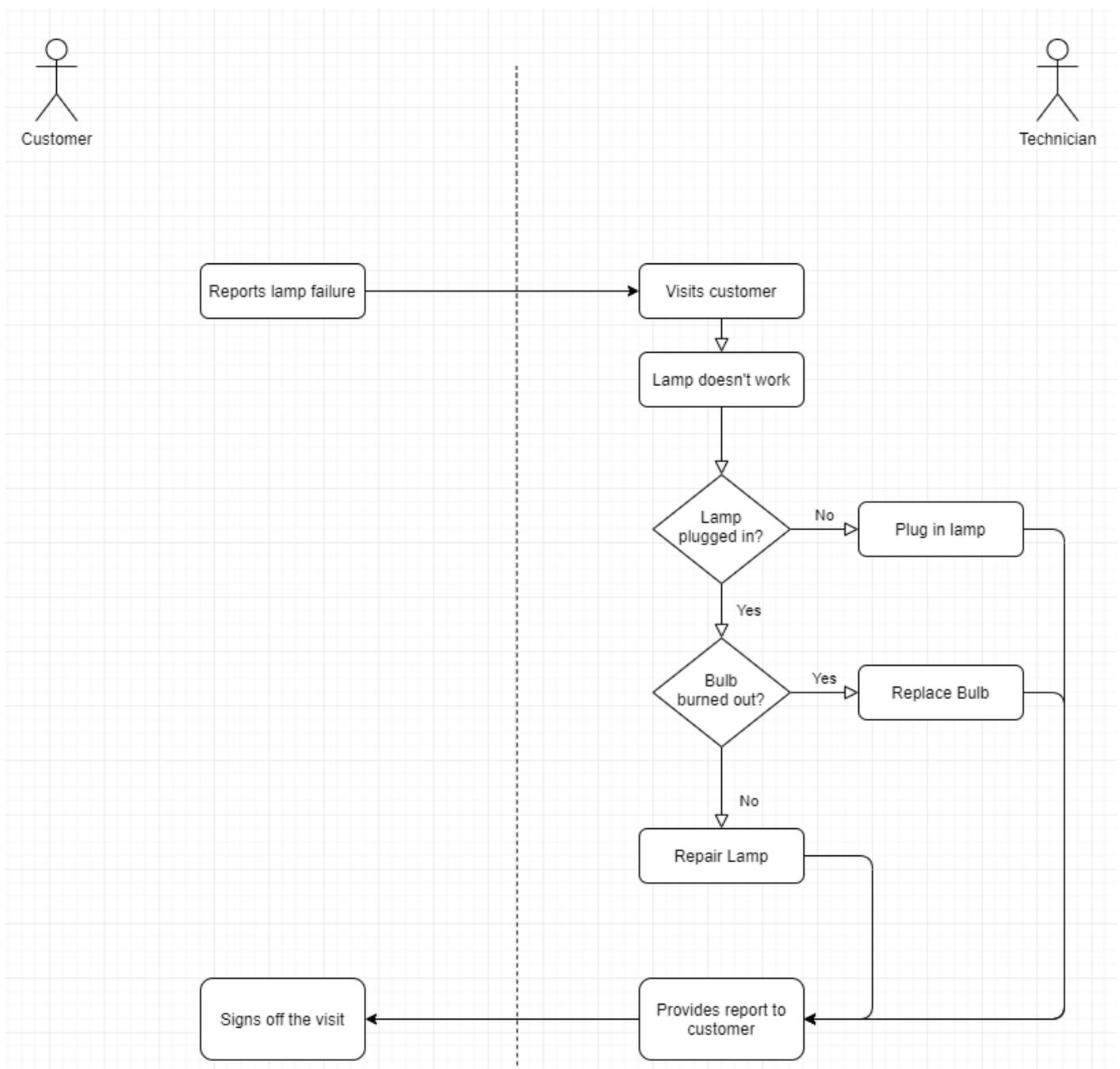
For each process, start at the beginning, and in short, keep asking 'what's next?'/ 'why do we do that?' until you've exhausted each endpoint at the end of each decision point.

An example of this is as follows:



Note that a step is a rectangle, and a decision is represented as a diamond. It's important to distinguish these as they represent gate checks or approval points which must be followed, and they will naturally create forks in the process which must be investigated fully.

Where a process has more than one stake holder, simply represent this as a person and divide up the diagram:



Once this is complete, evaluate the following:

- Is this the best way to achieve the objective of this process? If you do it this way just because this is how it has always been done, now is a good time to challenge that
- Are there any cloud software services which allow you to complete this process more efficiently, or automate elements of the process?

3.2.2.3. How do I store my documentation?

There are several solutions to this, and it's up to you to pick the best for your business. We'd recommend that the solution meets the following objectives:

- Is accessible from anywhere (behind proper login controls), thus, is easy to add more people as your team changes
- Is simple for anyone to request changes which an approval process, allowing your documentation to continuously evolve
- Allows you to easily reference one other page/document from another, allowing you to link together more complex processes over time (e.g. a process for managing a software project from start to finish is really a collection of smaller processes)
- Allows to easily create/update content with little technical experience

There are several options here:

- Use a knowledge base like [Confluence](#)
- Use process documentation software such as [Sweet Process](#)
- Create a well organised document structure within a cloud file storage system like [Dropbox](#), [Google Drive](#) or [Microsoft OneDrive](#)
 - o If you already use Google or Microsoft for email, you may already have a cloud storage subscription at no extra cost

When organising your processes, think about:

- Looking at other public examples, [Gitlab](#) is a great one
- Organising these into core business functions at top level, e.g. sales, finance etc

4. Cloud Software to help

Most businesses have the same core functions. The good news here is that there are lots of cloud-based software services which solve some of these particular problems.

4.1. Administration & Operations

4.1.1. Capturing data

Great for collecting data quickly, e.g. getting customer feedback



[JotForm](#) allows you to design professional looking forms with an online builder



Forms

[Google Forms](#) is another easy to use form builder, and allows for collaboration



[Survey Monkey](#) runs more of a 'survey' approach, and allows you to generate detailed reports and headline figures summarising the responses

4.1.2. Internal Communication

Internal communication tools to allow you and your team to collaborate



[Teams](#) Is a great tool for internal communication, allowing you to create groups, private chats and also video call people directly. It integrates well with other Microsoft products so a good option if you use this



[Slack](#) is like teams, but arguably a little more mature as a product

4.1.3. Task Management/Project Management

Enforcing your processes with online/cloud-based workflows is important, and if done correctly, allows you to see exactly what needs to be done to progress any given task



[Trello](#) allows you to create boards/lists of tasks, and organise these into a workflow. If you were managing tasks before with something like post it notes, or an excel sheet, Trello is a great alternative



[Monday.com](#) Allows for heavy customisation with task templates and board templates to allow you to create a great fit for your current workflow



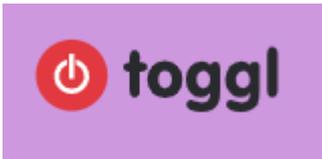
[Asana](#) is a work management platform which has features which both Trello & Monday have, but may be too much for some

4.1.4. Time Management

If you want to understand how to make people more efficient, you must first understand on what they spend their time. Tracking time gives you the data to make evidence based decisions to make people more efficient

[Harvest](#) is a time tracking tool which allows you and your team to easily track time against a particular task. This has great integrations with tools like Trello, allowing you to track time directly against any given task.

Harvest also has a forecasting feature, so if you set a project budget, and understand how much more time a project requires, you're able to see early indicators if that will go overbudget



[Toggl](#) and Harvest basically do the same thing

4.1.5. Cloud File Storage/Shared Storage

Cloud storage providers create a folder on your phone/computer and sync these for you across devices. You're able to build teams of people, allowing granular access to files/folders to particular people or groups of people, e.g. a marketing team only seeing marketing assets.



[Dropbox](#) has great integrations with other services, allowing for a good level of automation



[Google Drive](#) also comes with email and online versions of popular tools like Word and Excel



[OneDrive](#) Comes free with Office 365, and naturally has good integration with other Microsoft products

4.1.6. Internal Documentation

Capturing and documenting knowledge as you acquire is it is super important, and organising this well is key to documenting your processes. As an alternative, you may prefer to simply use a cloud storage provider and keep these as a set of documents in well organised folders



[Confluence](#) is a team workspace for capturing knowledge – think like a pretty Wikipedia for your own business



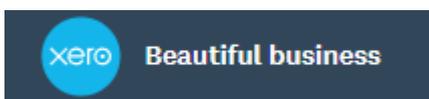
[Sweet Process](#) has a focus on capturing processes/procedures and tasks – if a rigid structure for documenting processes would benefit you, this tool may help



[Sharepoint](#) Allows you to build a knowledge base for your business like an internal website

4.2. Finance

Online Accounting Software



[Xero](#) automate much of the manual day to day aspects of accounting, and integrates with lots of other software which makes it easy to automate wider processes

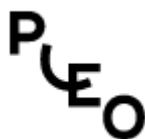


[Freeagent](#) is better geared towards smaller businesses and freelancers, with a more polished and simple interface, but likely still provides everything you require from accounting software

Expense Cards



[Soldo](#) or [Pleo](#) allows you to have prepaid master cards for your and your team, and integrates well into online accounting software to automate the admin behind it



Invoice/Receipt Reconciliation



[Receipt Bank](#) allows you to quickly capture a receipt with a photo from your phone, and it will automatically process this and pull out

Cashflow & forecasting software



[Futrli](#) or [Float](#) allow for cashflow forecasting and scenario planning based on real time data from your accounting software. This is great for budgeting and what if planning



4.3. Human Resources



[PeopleHR](#) - “Bring your HR data together, and then automate the repetitive tasks you hate. Track sick days, update employee information, stay on top of right to work information, and send out reminders and documents, all from one central system.

Easily run queries to find the information you need, then build intelligent, automatic workflows, that take care of the repetitive HR tasks you hate.”

4.3.1. Learning



[Udemy](#) Has a huge selection of online courses covering a huge range of topics. If you need to upskill yourself, or someone else, this is a good place to start

4.4. Sales & Marketing

CRM/Lead/Deal Tracking

pipedrive

[Pipedrive](#) is a sales CRM which is easy to use, and solely focussed on creating and managing a sales pipeline. It has easy to use reporting features, which allows for a drilldown across a number of factors

HubSpot

[Hubspot](#) is more than a CRM and deal tracking service, but encompasses marketing and lead generation as well. Hubspot has a pricing structure which scales more quickly, but that unlocks a range of powerful features

Marketing Automation

 **mailchimp**

[Mailchimp](#) allows you to stay connected with your audience through automated email marketing campaigns. Mailchimp has strong segmentation capability and automation, allowing you to easily categorise people into particular interests, and tailor your marketing to these segments

SmarterQueue

[SmarterQueue](#) allows you to schedule and automate the distribution of content across your social media platforms

4.4.1. Event Management

eventbrite

[Eventbrite](#) allows you to create local/online paid/free events and distribute these to your audience, or allow others to find these via Eventbrite's search facility

4.4.2. Customer Service/Communication



[Zendesk](#) or [Freshdesk](#) are an all in one support system for tracking, prioritising and solving customer support tickets. This allow the communication via live chat, email or a website, and also allow self service via online QAs



4.5. IT

4.5.1. Sharing Data Securely

Internally, you'll be able to share data via your cloud file storage software, unless it's also too sensitive to store there. As a rule of thumb, if you would not want anyone else getting their hands on this data, you must ensure it is shared securely. You may securely share passwords using one of the following solutions, or share data by password protecting it, sending that how you normally would, and then sharing the password securely

Secure password management and sharing



[LastPass](#), [1Password](#) or [Dashlane](#) allow you to securely store and share your passwords. This works across devices, and they all have great integrations with web browsers to allow you to easily populate login forms.

It's important that when you use these, you create a strong password for the password manager account, and enable mutli-factor authentication to secure your account



4.5.2. Multifactor Authentication

MFA allows you to secure your online accounts, requiring you to enter your login details as normal, but then using a device like your phone to input a code generated on the fly – this means that to hack your account, they need your login details and your phone, a much harder barrier



[Authy](#) is a phone app which allows you to generate one time codes that you input into after your password, this provides another level of security

[Yubico](#) sells usb hardware which does the same as the above, but you simply plug it into a usb port and press a button. Having both this and Authy is handy for flexibility



4.5.3. Connecting software together



[Zapier](#) allows you to connect all of your online software together, and automating the flow of data. Where ever you find yourself doing a manual task, it's worth checking whether that could be automated with Zapier.

An example might be the admin you do when winning a new deal, setting up internal projects, creating tasks of the back of this, it could all be automated

5. Bringing it all together

Now that you have the core ingredients, it's important to bring this together to execute the plan. We've covered:

- Setting a direction
- Understanding pain points
- Documenting processes
- Software available to support the transformation

Next, consider a high-level plan for software you want to use:

- By evaluating your key processes and pain points, are you able to create a list of software which plug gaps or create easy wins?
- Will this software communicate with each other, or are you able to use Zapier to make your own workflows?
- What are your key objectives, and how are you able to order your plan to hit these in the most efficient way possible?

What to avoid:

- Investing in lots of different software which doesn't integrate together. Now you have data silos and nothing talks to each other
- This needs a champion within the business, one person leading the charge. Without this, it's likely just a good idea with no execution. Are there any 'early adopters' inside your own business who will help drive this forward, and will help convert the nay sayers later on?
- Seeing this as a cost cutting exercise. In reality, this will cost you more in the short term as you invest time and money into strengthening money and better software. However, if executed correctly, this will pay off in the longer term with increase efficiency and effectiveness
- Just using the right software does not mean mission accomplished. This requires a culture of digital thinking and a consistent process of continuous improvement
- Not having high level targets to work towards, or KPIs. How do we know the transformation is working if we can't measure impact?

5.1. Execution, Continuous Improvement & Measuring Impact

As stated, this is a marathon, not a sprint. You've set a clear direction and end goal, now aim to move towards that at a consistent pace.

To do this, we recommend:

- Prioritising the pain point list, and your objectives, and focus on solving one at a time (Could you use one of the task tracking tools listed above like Trello?)
- Focus on solving these in a rhythm. E.g., you might agree a tempo of documenting 1 process a week, or 2 pain points a month
- Weed out the easy wins, and if possible, do those first. For example, if you're able to mitigate a pain point simply by switching from a manual process to online software, do that. Examples might be:
 - o You manually scan all of your receipts and upload these into your accounting software, where as you could use [ReceiptBank](#) to automate this instead
 - o You manually do credit control and chase payments for late invoices, where as [Chaser](#) for automated invoice chasing or [GoCardless](#) for automatically collecting payments may solve the problem more quickly

It's also important to see each improvement as a cycle, and that the first iteration is likely not the best one. For this reason, we'd recommend:

- Allowing for a two 2-week process for the review of each idea/implementation. For example, if someone has a task to complete a process in one week, instead allow them to pitch that documented process after 1 week, receive face to face (or video) feedback, and then another week to tweak and modify the process. This sometimes takes several iterations before it's correct.
 - o However, it's important not to get bogged down in the detail, start testing a documented process, new software or a new way of working as soon as possible, and make changes based on actionable feedback and evidence. Perfecting too early wastes time
- Consider following a [Build Measure Learn](#) approach for process development & achieving objectives:
 - o **Build:** Define the idea, plan it and then execute. For example, this maybe a process or a method to mitigate a pain point. Understand what KPI/pain point/objective this should positively change/mitigate – this is your success criteria for this cycle

- **Measure:** After putting the process in place, use it. Allow enough time to collect data, and review if this change impacted the objective in a positive way
- **Learn:** Learn from the data. Did this have the effect you expected? If so, persevere, and if you think it's possible, find a way to further improve. If it did not yield the expected results, consider whether you need to pivot on this idea and change tact, or scrap it all together

Empower your people

It's important that this is a team effort, and that everyone contributes. Consider the following:

- The leadership team leads the charge on this, they're actively seen to be improving process and following them, and showing enthusiasm in digital adoption
- Empower team members to champion certain aspects, e.g. A project manager for delivery, or a business development manager for sales
- Make it a ritual, ingrain it into your working week. Allow people to have a time budget to complete these tasks and protect that time. Set monthly targets for achieving objectives and meet on a schedule to allow everyone to demonstrate their work and receive constructive feedback
- Encourage a culture of challenging current process in responsible non-combative way. Making mistakes is inevitable, embrace that and build the learnings into your documentation to facilitate continuous improvement

Next steps

Start, the time is now!

But you're not in this alone. If you would like advice or assistance from [Wubbleyou](https://wubbleyou.co.uk), please reach out to us at contact@wubbleyou.co.uk, or 0191 259 1272. Not everything is solvable with off the shelf software, and we're here to help if that's the case for you.

And of course, please share this with anyone who you feel would benefit from streamlining and automating their internal business processes!