A USEFUL PICTURE OF YOUR BUSINESS

Business Improvement Blueprint

Example Advisory Ltd

35 people. Four business functions. Eight priority workflows.

Understand the work.
Choose the improvements.
Measure the difference.

WHAT MANAGEMENT CAN DECIDE

Where to start, what to fund and which controls to put in place.

This fictional example demonstrates the structure and level of detail of a Business Efficiency Review. All volumes, costs, scores and benefits are invented modelling assumptions. No client interviews or measured results are represented.

Prepared by LuxVibeWeb / November 2026

01 / EXECUTIVE BRIEFING

Three practical first moves

Illustrative recommendation for a 35-person professional services business.

45.4	£6,300	£150
hours/month of potential capacity	indicative first-wave build cost	indicative monthly running cost

01 Approve a controlled onboarding pilot

Use one approved intake record to reduce repeated entry and chasing. Prove data quality, permissions and exception handling before extending the integration.

02 Improve invoice preparation and reporting

Generate drafts from approved source records and reconcile reporting totals. Finance retains approval of invoices. No automatic payments are proposed.

03 Close the leaver-control gap immediately

Assign an owner to the access-removal checklist. This is a risk-control recommendation and is excluded from the three-project capacity headline.

Management decision: approve baseline measurement and detailed implementation scoping. The £6,300 build allowance is illustrative, not a quotation. The example £5,950 review fee is separate.

Scope: Sales, Operations, Finance and People/IT interfaces. Six stakeholder sessions and eight priority workflows. Client service is considered within Operations. Industry-specific assurance and exhaustive security testing are outside this sample.

02 / WORKFLOW MAPPING

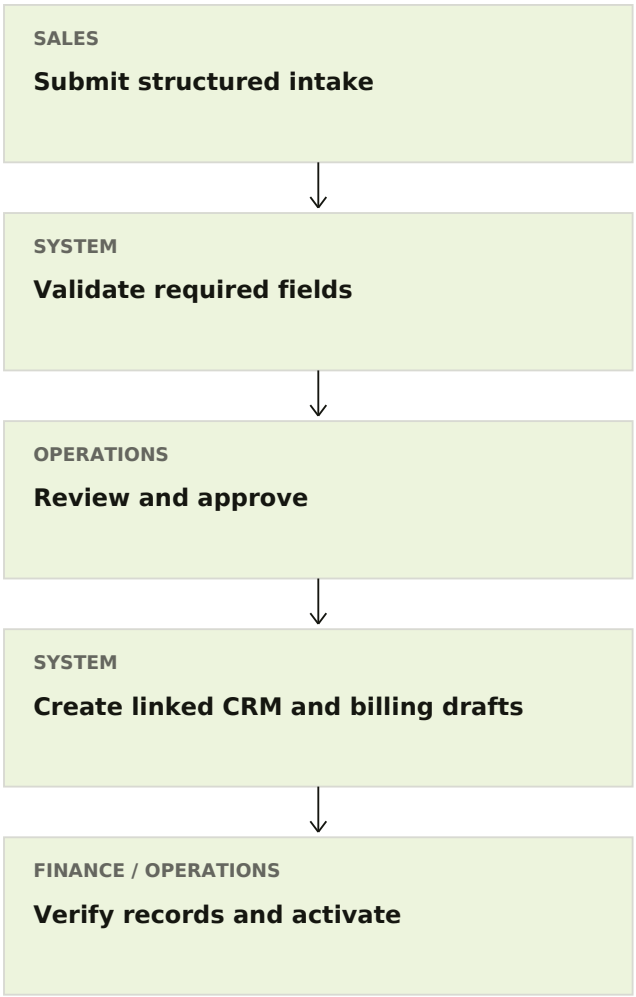
Client onboarding, made visible

W01: from a signed instruction to an approved, active client record.

CURRENT PROCESS



PROPOSED PROCESS



Exception route: missing fields return to the intake owner. A duplicate or failed system update enters a visible exception queue. Staff resolve it before activation; retries must not create a second record.

Systems of record: CRM owns client identity, finance owns billing details and the workflow holds progress and approvals. Preserve timestamps and approval history. No AI is required for this proposed workflow.

03 / IMPROVEMENT REGISTER

A prioritised set of opportunities

Priorities reflect benefit, effort, risk and readiness. Scores are illustrative judgements.

Workflow	Recommended action	Hours / month*	B / E / R / Ready
W06 Leaver access removal	Control first	0.9	5/1/5/3
W01 Client onboarding	Pilot first	22.5	5/3/3/4
W02 Invoice preparation	Pilot first	13.3	4/2/4/4
W03 Management reporting	Pilot first	9.6	4/2/2/4
W05 Enquiry allocation	Next wave	6.4	3/1/2/4
W07 Expense submissions	Next wave	6.0	2/2/3/4
W04 Routine client queries	Validate later	6.7	3/3/4/2
W08 Internal knowledge search	Hold for readiness	10.0	3/4/4/1

Score key, 1 to 5: benefit: minor to material; effort: simple to substantial; risk: low consequence to high consequence; readiness: blocked to ready. Risk is the consequence of failure, not a reason to ignore the workflow.

*Potential realised capacity after the adoption allowance, not cash savings. These rows must be checked for shared tasks and overlapping benefits before combining them. Only W01-W03 are included in the first-wave business case.

04 / INDICATIVE BUSINESS CASE

Show the assumptions

First wave: onboarding, invoice preparation and management reporting only.

Assumption / output	Onboarding	Invoices	Reporting
Monthly cases	40	100	4
Minutes potentially removed per case	45	10	180
Realisation allowance	75%	80%	80%
Realised hours per month	22.5	13.3	9.6
Illustrative loaded hourly cost	£35	£35	£50
Annual capacity value	£9,450	£5,600	£5,760
Indicative implementation	£3,000	£1,800	£1,500
Monthly running costs	£80	£40	£30

Calculation: monthly cases × minutes removed ÷ 60 × realisation allowance. Annual capacity value = realised hours × loaded hourly cost × 12.

First-year comparison: £20,810 potential capacity value less £1,800 running costs, £6,300 implementation and the £5,950 review fee = £6,760 illustrative capacity-value surplus. Internal change time, tax and financing are excluded.

This is not a cash saving or a guaranteed return. Capacity creates financial value only if the business can use it. No headcount reduction, incremental revenue or reduced overtime is assumed. The figures describe a full 12 months at steady state, not the first 12 months from commissioning.

Sensitivity: at 50% of the modelled benefit, annual capacity value is £10,405. The comparable first-year capacity-value result becomes -£3,645. Pilot measurements should determine whether to proceed.

05 / 90-DAY PLAN

A measurable first release

Named responsibilities and decision gates keep the programme manageable.

When	Action and owner	Exit condition
Days 1-15	Operations: confirm workflow owners and baseline time. Finance: verify case volumes. IT: confirm integration access.	Signed-off baseline, scope and data handling. Resolve the leaver checklist ownership now.
Days 16-30	Operations + implementation partner: build a small onboarding pilot using synthetic or approved test data.	No duplicate records, failed updates visible, approval and access tests passed.
Days 31-60	Finance: pilot draft invoices. Operations: pilot reporting. Train a small user group and retain a manual fallback.	Amounts reconcile, users can handle exceptions, no unauthorised external actions.
Days 61-90	Management: compare before and after results, actual running costs and staff feedback.	Proceed, adjust or stop each workflow. Assign next-wave owners only after evidence supports expansion.

Measure weekly: handling time per completed case, elapsed turnaround, rework/error rate, exception rate, adoption and actual running cost. Use comparable case types and include review effort in the new handling time.

Pilot acceptance targets to agree: zero unauthorised sends or access changes; 100% reconciliation on the pilot invoice sample; all failed updates visible; median onboarding handling time reduced without increased rework. Define sample size and observation period before the pilot.

06 / EVIDENCE AND HANDOVER

A blueprint your team can use

The report, editable register and process maps form one practical handover.

01 Evidence that a real review would collect

Stakeholder interviews, observed walkthroughs, transaction volumes, sample timings, existing documents and system constraints. Record source, date, process owner and whether each figure is measured, reported or estimated.

02 Validate with the people doing the work

Ask staff to demonstrate a normal case and an exception. Include handovers, approvals, workarounds and failure recovery. Confirm the map and proposed change with the process owner before management sign-off.

03 Separate assumptions from evidence

All figures in this sample are fictional assumptions with no empirical confidence claim. A client report would state confidence and unresolved dependencies beside each recommendation. Preserve human review where consequences warrant it.

04 Keep ownership and the next decision clear

The client receives a PDF, an editable opportunity and benefits workbook, editable workflow maps and a management walkthrough. Implementation is separately scoped. The blueprint can be used with internal teams or another supplier.

Your business. A clearer plan.
luxvibeweb.co.uk/services/business-efficiency-review