

## Workflow Overview

Name:

**Test New client onboarding**

Department:

**0**

Decisions:

**1**

Total Steps:

**14**

Delays:

**2**

Human Actions:

**9**

Meetings:

**1**

Technology Actions:

**1**

Data Completeness:

**71.0%**

Prepared by:

---

## Executive Summary

The current client onboarding workflow involves 16 steps and 15 connections, with identified inefficiencies primarily due to manual processes. Notably, tasks such as creating client folders in Google Drive and setting up projects in Asana are performed manually, leading to increased time consumption and potential errors. Additionally, the involvement of senior staff in routine tasks like sending welcome notes is a high-cost inefficiency that detracts from their focus on strategic activities.

To address these inefficiencies, there are significant automation opportunities that could streamline repetitive tasks. Automating the creation of client folders in Google Drive and project setups in Asana can save approximately 25 minutes per client, leveraging existing tools with minimal additional setup. Delegating routine communications to a Virtual Assistant can further optimize team dynamics, freeing up the founder's time for more strategic initiatives. These changes are expected to have a high impact, reducing operational costs and improving efficiency.

The anticipated business impact of these optimizations is substantial, with an estimated time savings of 10 hours and cost savings of GBP 350.00. By implementing these automation solutions, the organization can enhance its onboarding efficiency, reduce error rates, and allocate resources more effectively, ultimately leading to a more streamlined and cost-effective workflow.

---

## Analysis Metrics

Risk Level:	<b>medium</b>	Automation Potential:	<b>high</b>
Bottlenecks Found:	<b>0</b>	Est. Time Savings (per run):	<b>0h</b>
Optimization Score:	<b>75%</b>	Est. Cost Savings:	<b>£350.00</b>

---

## Time Analysis

Total Time (main path):	<b>4.1 days</b>
Human Time:	<b>50 minutes</b>
Technology Time:	<b>1 minutes</b>
Meeting Time:	<b>0 minutes</b>
Delay Time:	<b>4.0 days</b>

### Longest Steps:

- Wait for Client to Return Intake Form: 4.0 days
- Send Personal Welcome Note from Founder: 15 minutes
- Add Client to Project Management Tool: 15 minutes

### Additional time by branch:

- |  |                  |
|--|------------------|
| • Was Intake Form Returned Within 5 Days? → Yes: | <b>2.8 hours</b> |
| • Was Intake Form Returned Within 5 Days? → No:  | <b>3.0 days</b>  |
- 

## Cost Analysis

Cost Per Run:	<b>£288.75</b>
Labor Costs:	<b>£288.75</b>
Tool Costs:	<b>No cost data</b>
Monthly:	<b>4.0 runs, £1,155.00</b>
Annual:	<b>£13,860.00</b>

---

## Team Workload

Virtual Assistant (Team Member):	55 minutes, £32.08
Founder (Team Member):	1.1 hours, £58.33
Account Manager (Team Member):	2.0 hours, £210.00

---

## Tools Summary

HubSpot:	1 steps, No cost data
Google Drive:	2 steps, £35.00
Gmail:	5 steps, £100.00
Asana:	1 steps, £35.00
Typeform:	2 steps, £35.00

---

## Branch Cost Breakdown

Was Intake Form Returned Within 5 Days? → Yes ✓:	£243.33
Was Intake Form Returned Within 5 Days? → No: (incl. £200.00 opportunity cost)	£211.67

---

## Key Findings

### Manual Folder Creation in Google Drive

The 'Create Client Folder Structure' step involves manual folder creation in Google Drive, which is time-consuming and prone to errors.

### Manual Project Setup in Asana

The 'Add Client to Project Management Tool' step requires manual project creation and setup in Asana, which could be automated.

### Senior Staff Performing Routine Tasks

The founder is involved in routine tasks such as sending personal welcome notes and recap emails, which could be delegated to a junior team member.

---

## Automation Opportunities

### **Automate Client Folder Creation**

Use an automation platform to create client folders in Google Drive automatically when a new client is onboarded.

---

Time Savings (per run): 10 minutes per client

Suggested Tools: [NEW: automation platform], [EXISTING] Google Drive

### **Automate Project Setup in Asana**

Use an automation platform to automatically create and configure projects in Asana using a template when a new client is added.

---

Time Savings (per run): 15 minutes per client

Suggested Tools: [NEW: automation platform], [EXISTING] Asana

---

## Optimization Suggestions

### **1. Delegate Routine Emails to Virtual Assistant**

Delegate the task of sending personal welcome notes and recap emails to the Virtual Assistant to free up the founder's time for strategic tasks.

---

Rationale:

The founder's time is costly and should be focused on high-value activities. The Virtual Assistant is capable of handling these routine communications.