

## Workflow Overview

Name:

**Purchase Approval Process**

Department:

**0**

Decisions:

**1**

Total Steps:

**12**

Delays:

**1**

Human Actions:

**10**

Meetings:

**0**

Technology Actions:

**0**

Data Completeness:

**83.0%**

Prepared by:

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## Executive Summary

The current Purchase Approval Process involves 14 steps and 13 connections, with a critical bottleneck identified at the director response stage, causing delays of 2 to 3 days. This delay significantly impacts the overall timeline, affecting timely procurement and financial reconciliation. Additionally, the reliance on manual email submissions and approvals creates inefficiencies, leading to inconsistent information and increased communication time.

To address these challenges, there are high-impact opportunities for automation. Implementing a standardized purchase request form and automating its submission can streamline the process, ensuring consistent information and reducing time spent on clarifications. Automating the finance reconciliation process by integrating email threads with Xero can further enhance efficiency, saving approximately 3 hours per week. These automation efforts are expected to significantly reduce repetitive tasks and improve process flow.

The anticipated business impact includes an estimated time savings of 15 hours and cost savings

of GBP 150.00. By leveraging automation, the organization can enhance efficiency, reduce bottlenecks, and improve record-keeping, leading to a more streamlined and effective purchase approval process. This not only optimizes resource allocation but also supports timely procurement and financial operations, ultimately contributing to a more agile and responsive business environment.

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## Analysis Metrics

Risk Level:	<b>high</b>	Time Savings (per run): Est.	<b>31 minutes</b>
Bottlenecks Found:	<b>1</b>	Cost Savings (per run): Est.	<b>£18.00</b>
Optimization Score:	<b>45%</b>	Time Savings (annually): Est.	<b>155 hours</b>
Automation Potential: Est.	<b>high</b>	Est. Cost Savings (annually): Est.	<b>£5,400</b>

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## Time Analysis

Total Time (main path):	<b>18 minutes</b>
Human Time:	<b>18 minutes</b>
Technology Time:	<b>0 minutes</b>
Meeting Time:	<b>0 minutes</b>
Delay Time:	<b>0 minutes</b>

### Longest Steps:

- Line manager reviews the request: 10 minutes
- Submit purchase request by email: 8 minutes

### Additional time by branch:

- |                                      |                   |
|--------------------------------------|-------------------|
| • Is the purchase under £500? → Yes: | <b>36 minutes</b> |
| • Is the purchase under £500? → No:  | <b>16.9 hours</b> |
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## Cost Analysis

Cost Per Run:	<b>£37.57</b>
Labor Costs:	<b>£37.57</b>
Tool Costs:	<b>No cost data</b>
Monthly:	<b>25 runs, £939.17</b>
Annual:	<b>£11,270.00</b>

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## Team Workload

Team Member (Team Member):	<b>31 minutes, £9.30</b>
Line Manager (Team Member):	<b>21 minutes, £12.25</b>
Finance (Team Member):	<b>45 minutes, £21.00</b>

## Tools Summary

Microsoft Outlook:	8 steps
Microsoft Excel:	1 steps
Gmail:	1 steps
Xero:	2 steps
Slack:	1 steps

## Branch Cost Breakdown

Is the purchase under £500? → Yes:	£14.98
Is the purchase under £500? → No ✓:	£29.33

## Key Findings

### Director response delay

The step 'Waiting for director to respond' causes significant delays, averaging 2 to 3 days, which impacts the entire process timeline.

### Manual email submissions and approvals

Steps 'Submit purchase request by email' and 'Line manager approves by email reply' rely on manual email processes without standardization, leading to inconsistent information and lack of record-keeping.

### Fragmented email trail for finance reconciliation

The step 'Finance reconciles against fragmented email trail' involves manually locating and verifying emails across different threads, which is time-consuming and error-prone.

### **Standardize purchase request format**

Implement a standardized form for purchase requests to ensure consistent information and streamline the approval process.

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## **Automation Opportunities**

### **Automate purchase request submission**

Use an automation platform to create a standardized form for purchase requests, automatically sending completed forms to the line manager for review.

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**Time Savings (per run): 2 hours per week**

Suggested Tools: [NEW: automation platform], [EXISTING] Microsoft Outlook

### **Automate finance reconciliation**

Use an automation platform to integrate email threads with Xero, automatically extracting and logging purchase details.

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**Time Savings (per run): 3 hours per week**

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

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## **Optimization Suggestions**

### **1. Implement a centralized purchase approval system**

Adopt a centralized system for managing purchase requests and approvals to streamline communication and record-keeping.

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Rationale:

A centralized system reduces email dependency, improves transparency, and ensures all stakeholders have access to the same information.

## **2. Delegate routine tasks to junior team members**

Reassign routine tasks such as 'Submit purchase request by email' and 'Team member forwards receipt to finance' to junior team members to optimize workload distribution.

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Rationale:

Delegating routine tasks frees up senior team members for more strategic activities and improves overall efficiency.