



# Where Should You Start with Automation?

A Practical Guide to Identifying High-Impact  
Opportunities Before You Buy Anything

## TABLE OF CONTENTS

<b>A Note Before You Begin</b>	<b>1</b>
<b>What's Inside This Guide</b>	<b>2</b>
<b>Chapter 1: The Hidden Cost of Manual Work</b>	<b>3</b>
<b>Chapter 2: The 4 Types of Automation Wins</b>	<b>4</b>
<b>Chapter 3: Warning Signs by Department</b>	<b>5</b>
<b>Chapter 4: What Success Looks Like</b>	<b>6</b>
<b>Chapter 5: Why There's No One-Size-Fits-All Solution</b>	<b>7-8</b>
<b>Chapter 6: Quick Assessment: Find Your First Win</b>	<b>9</b>
<b>Chapter 7: Your Next Step</b>	<b>10</b>
<b>About Valenta</b>	<b>11</b>

AI-Powered Intelligent Automation



## A Note Before You Begin

If you're reading this, something in your business isn't working the way it should.

Maybe your team is buried in work that feels far too manual for 2026. Maybe reports take days when they should take minutes. Maybe growth has stalled not because demand isn't there, but because your operations can't keep up.

You're not alone. In our work with hundreds of businesses across industries, we've found that **the biggest barrier to automation isn't technology it's knowing where to start.**

That's what this guide is for.

We're not going to sell you software or overwhelm you with technical jargon. Instead, we'll help you see your operations with fresh eyes spotting the hidden costs of manual work and identifying the opportunities where automation delivers real, measurable impact.

**Our philosophy is simple:** optimize before you automate, start small, prove value, then scale. That approach has helped our clients reclaim thousands of hours, reduce errors to near zero, and finally focus on the strategic work that moves their businesses forward.

By the end of this guide, you'll have clarity on where automation can help you most and a practical next step to get started.

**Let's bring some clarity to the chaos.**

## The Valenta Team



## What's Inside This Guide

This guide is designed for operators, functional leaders, and executives who know automation matters but aren't sure where to begin.

### 1 Chapter 1: The Hidden Cost of Manual Work

Why manual processes are quietly taxing your business and why it gets worse as you grow.

### 2 Chapter 2: The 4 Types of Automation Wins

A simple framework to spot high-impact opportunities in any department.

### 3 Chapter 3: Warning Signs by Department

How to recognize when Finance, Operations, HR, and RevOps teams need automation most.

### 4 Chapter 4: What Success Looks Like

Real examples of automation in action and typical results teams experience.

### 5 Chapter 5: Why There's No One-Size-Fits-All Solution

Understanding the automation landscape and why workflow-first thinking beats tool-first buying.

### 6 Chapter 6: Quick Assessment: Find Your First Win

A 5-minute exercise to identify your highest-impact automation opportunity.

### 7 Chapter 7: Your Next Step

How to move forward with confidence without overcommitting.



## Chapter 1: The Hidden Cost of Manual Work

Most leaders don't wake up thinking, "We need automation."

**They wake up thinking:** Why did this report take so long again? Why are we reconciling numbers that should already match? Why does everything slow down when one person is out?

Manual work doesn't announce itself as a crisis. It shows up quietly as drag. Until volume increases. Until errors stack up. Until growth exposes the cracks.

That's when automation stops being "nice to have" and becomes **necessary**.

# 67%

of teams spend 5+ hours per person each week on repetitive manual tasks

McKinsey & Company

### What This Looks Like in Practice

- A **finance team** spends the first 5–7 days of every month reconciling data across systems then debates which version is correct.
- An **operations leader** can't answer a simple question ("Where are we today?") without pulling data from three tools and two people.
- A **high-performing employee** becomes the unofficial "system" until they burn out or leave.

The cost isn't just time. It's delayed decisions, normalized errors, burnout, and leaders operating on stale information.

**Manual work doesn't scale. It compounds.**

### The Math That Makes Leaders Wince



- A task that takes 15 minutes, repeated 200 times per month, quietly consumes **50+ hours**



- One manual reconciliation per day becomes **250+ interventions per year**



- A single error caught late often triggers **multiple hours of rework across teams**

These costs rarely appear on a P&L but they show up everywhere else.

### Quick Check: Is Manual Work Holding You Back?

#### Ask yourself:

- If one key person were out tomorrow, would critical work stop?
- Are reports built manually each week or month?
- Do teams re-enter the same data into multiple systems?
- Do errors get caught late by customers, auditors, or leadership?

If you answered yes to more than one, automation isn't a future initiative. It's a risk mitigation strategy.

## Chapter 2: The 4 Types of Automation Wins

Not every process is worth automating. But some deliver outsized returns. Here's a simple framework to spot the opportunities that matter most.

### 1 Volume + Repetition

"Death by a Thousand Clicks"

#### ● Example

Invoices arrive by email, data is copied into systems, files are saved manually.

#### ● Pain

Hours of effort, inconsistent data, errors discovered weeks later.

#### ● Why automation works

Rules don't get tired. People do.

### 2 Error-Sensitive Processes

"Small Mistake, Big Cleanup"

#### ● Example

Payroll changes handled manually lead to corrections and employee frustration.

#### ● Pain

Rework, loss of trust, compliance exposure.

#### ● Why automation works

Consistency, validation, and audit trails reduce risk.



### 4 Visibility Gaps

"By the Time We Know, It's Too Late"

#### ● Example

Leadership reviews last month's numbers because real-time reporting is manual.

#### ● Pain

Reactive decisions and late surprises.

#### ● Why automation works

Visibility as work happens not after the fact.

### 3 Decision Bottlenecks

"Everything Waits on One Inbox"

#### ● Example

Requests pile up in email awaiting approvals or routing.

#### ● Pain

Long cycle times, constant follow-ups, leaders stuck as bottlenecks.

#### ● Why automation works

Work keeps moving while preserving human judgment for what matters.

The biggest gains usually come from eliminating handoffs, rework, and exception chaos not from automating everything.

## Chapter 3: Warning Signs by Department

Here's how to recognize when specific teams need automation most and what's really at stake.



### Finance & Accounting

- Month-end close takes longer every quarter
- Reconciliations depend on spreadsheets
- Errors aren't surprising anymore they're expected

**Reality check:** If finance can't move faster without adding headcount, the process is the constraint.



### Operations

- Processes break as volume increases
- Status lives in inboxes or people's heads
- Firefighting crowds out improvement work

**Reality check:** If growth increases chaos, the workflow needs attention.



### HR & People Ops

- Onboarding relies on emails and manual checklists
- Payroll changes require manual intervention
- Employee data lives in too many disconnected systems

**Reality check:** People feel HR friction immediately it affects morale and retention.



### Rev Ops & Sales Ops

- Forecasts require manual cleanup
- CRM data quality depends on constant reminders
- Reports lag reality by days or weeks

**Reality check:** If forecasts require heroics, confidence is already compromised.

## Chapter 4: What Success Looks Like

When automation is scoped correctly, results often come faster than expected not because they're flashy, but because they remove work that never should have been manual in the first place.

### What Teams Typically Experience

**30-60%**

reduction in manual effort for targeted workflows

**5X-8X**

faster processing speed

**40-70%**

cost reduction on automated processes

**ROI**

within weeks, not months or years

#### Finance: From 7-Day Close to Predictable Rhythm



**Before:** Manual reconciliations across systems. Close took 5-7 days. The finance team worked weekends.

**After:** Automated data pulls and exception-based review. Digital assistants handle matching; humans handle judgment calls.

**Impact:** Close time cut in half. Fewer late adjustments. Finance time shifted from cleanup to analysis and strategic planning.

#### Operations: When Growth Stopped Being the Problem



**Before:** Volume increased faster than visibility. Status lived in inboxes and meetings. Every growth spike created chaos.

**After:** Automated workflows and real-time tracking. Clear ownership at every stage.

**Impact:** 20-40% reduction in cycle times. Fewer escalations. Team could finally focus on improvement instead of firefighting.

#### HR: Onboarding Without the Chaos



**Before:** Manual checklists, missed steps, payroll corrections on every new hire.

**After:** Automated onboarding workflows triggered by hire date. System coordinates IT, payroll, and operations automatically.

**Impact:** New hires productive faster. Near-zero payroll corrections. HR time redirected to culture and retention not paperwork.

By automating billing and reporting, we saved 40+ hours a month and reduced errors by 95%. But the real win? Reclaiming time for strategy."

## Chapter 5: Why There's No One-Size-Fits-All Solution

One of the biggest misconceptions about automation is that there's a single platform that can solve everything.

In reality, most automation initiatives fail not because the technology is bad, but because the wrong type of automation is applied to the wrong kind of workflow.

Most real-world processes don't live neatly inside one system. They span email, ERP, CRM, spreadsheets, shared drives, and human judgment. Expecting one tool to handle all of that creates fragile, partial solutions.

**The key insight: Automation works best when workflow needs determine technology choices not the other way around.**

### A Simplified View of Automation Capabilities

You don't need to become a technology expert. But it helps to understand that different problems require different solutions and that the market is full of options, each with strengths and limitations:



**Rules-based automation** handles high-volume, structured work like moving data between systems or validating entries.

**Examples:** UiPath, Automation Anywhere, Blue Prism, Microsoft Power Automate

**The challenge:** These tools are powerful but require technical expertise to configure, maintain, and scale. They work best for stable, well-defined processes.



**AI-driven automation** handles work that involves interpretation like classifying requests, extracting meaning from documents, or providing decision support.

**Examples:** ChatGPT/OpenAI, Microsoft Copilot, Google Gemini, Claude, industry-specific AI tools

**The challenge:** AI capabilities are evolving rapidly, but embedding them into real workflows requires integration work, guardrails, and human oversight to ensure accuracy.



**Workflow orchestration** coordinates work across people, systems, and automations like routing approvals or triggering handoffs between departments.

**Examples:** Zapier, Make, n8n, Workato, Microsoft Power Automate, ServiceNow

**The challenge:** Easy to start, but complex workflows quickly become fragile. Managing dozens of "zaps" across an organization creates its own maintenance burden.



**Document intelligence** turns messy inputs (invoices, contracts, forms) into usable data without manual re-keying.

**Examples:** ABBYY, Kofax, Amazon Textract, Microsoft Document Intelligence

**The challenge:** Accuracy depends heavily on document quality and variety. Training models for your specific documents takes time and expertise.

## Sound overwhelming? It is. And this is just a partial list.

High-impact automation usually requires a combination of these approaches, selected and integrated based on your specific workflows. That's why tool-first thinking often backfires and why workflow-first thinking, with expert guidance, delivers faster results.



### The Limitation of Built-In Automation

Many organizations assume they're already "doing automation" because their core systems advertise automation features.

But those capabilities are typically limited to that single application, constrained to pre-built rules, and difficult to customize for real-world edge cases.

- A CRM can automate follow-ups but can't reconcile data with finance systems
- An ERP can enforce rules but can't adapt when inputs arrive via email or PDF
- An HR system can trigger tasks but can't coordinate across IT, payroll, and operations

The biggest gains usually come from automating across systems, not just within them. That cross-system layer is often missing, limited, or non-customizable in off-the-shelf software.

### Why Managed Automation Makes Sense

When automation spans multiple technologies, building and maintaining everything internally becomes costly and fragile.

A managed approach where someone handles the complexity for you allows teams to:

- Move faster without large upfront investments
- Avoid tool sprawl and brittle integrations
- Blend automation with human oversight where judgment matters
- Focus on outcomes instead of infrastructure

**The goal isn't to own every tool. It's to design workflows that work consistently, reliably, and at scale.**

## Chapter 6: Quick Assessment: Find Your First Win

Use this 5-minute exercise to identify your highest-impact automation opportunity.

### Step 1: List Your Top 5 Manual Processes

What repetitive tasks consume the most time in your organization? Think about work that happens daily or weekly across your team.

Process	Hrs/Wk	People	Error (1-5)	Impact (1-5)	Score
1					
2					
3					
4					
5					

### Step 2: Score Each Process

For each process, estimate:

- **Hours/Week:** Total time spent by all people involved
- **People Involved:** Number of team members who touch this process
- **Error Risk (1-5):** How often does this process produce errors? 1=rarely, 5=frequently
- **Business Impact (1-5):** How much does this affect customers, revenue, or compliance? 1=low, 5=high

### Step 3: Calculate Priority Score

Multiply: **Hours × People × Error Risk × Business Impact = Priority Score**

The highest score is likely your best first automation candidate. Why? It combines frequency, scale, risk, and impact the factors that drive the fastest ROI.

### Step 4: Validate Your Choice

**Before committing, ask:**

- Does this process have clear rules (even if complex)?
- Is there a defined owner who wants improvement?
- Can we measure success (time saved, errors reduced, etc.)?
- Will results be visible within 90 days?

**If you can check all four boxes, you've found your quick win.**

**Remember: Momentum beats ambition. A successful small win creates more organizational change than a failed big initiative.**

## Chapter 7: Your Next Step

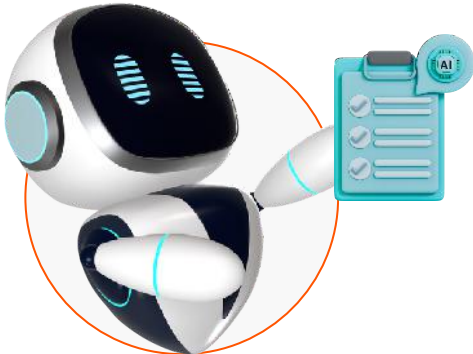
Manual work is a tax you don't have to keep paying.

Automation doesn't have to be dramatic to be meaningful. It just has to be intentional.

**Start small. Prove value. Build from there.**



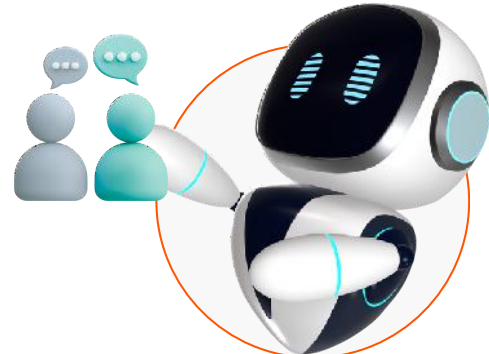
### Two Ways to Move Forward



#### Option 1: Automation Assessment

A focused conversation to validate your priorities, quantify potential ROI, and identify quick wins without commitment or sales pressure.

**Best for:** Leaders who have identified pain points but want expert validation before investing time or resources.



#### Option 2: Automation Workshop

A deeper working session to map your workflows, prioritize opportunities, and build a 90-day roadmap with your team involved.

**Best for:** Organizations ready to move from exploration to action, with stakeholder alignment on the need for change.

**Ready to Find Your First Win?**  
Schedule a complimentary Automation Assessment with a Valenta expert.

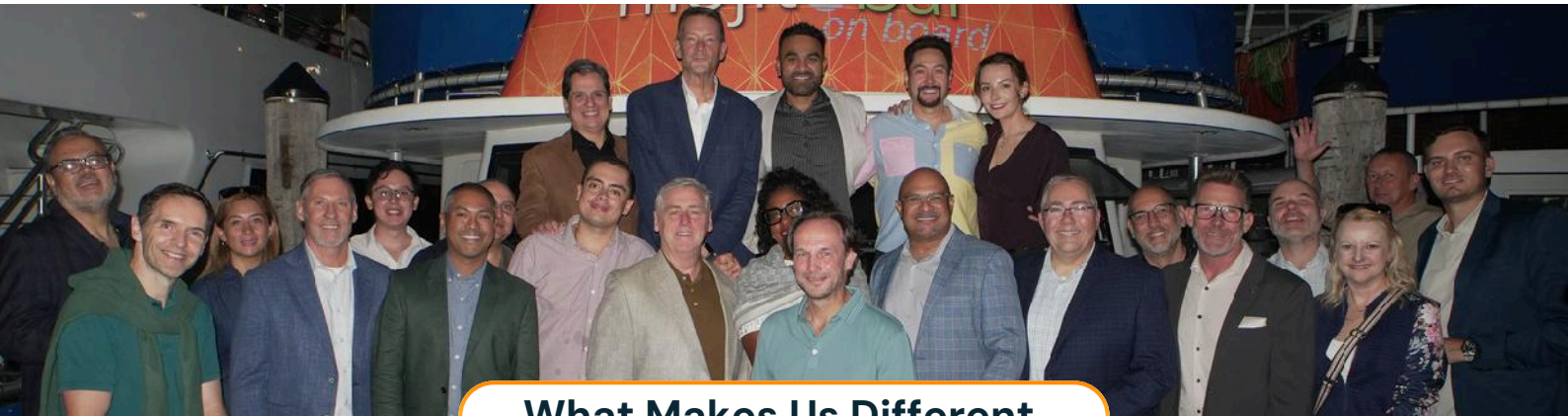
**Get Your Complimentary Assessment**

## About Valenta

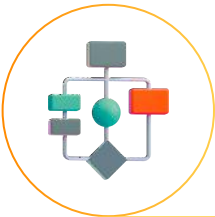
Valenta is a global provider of AI-powered intelligent automation and analytics, delivered-as-a-service.

We help organizations modernize operations through workflow optimization, automation, and AI without the complexity of building and maintaining it yourself.

Our approach is tech-agnostic, outcome-focused, and designed to scale as your business grows.



## What Makes Us Different



### Delivered-as-a-Service

We handle licenses, development, implementation, and maintenance, you get results without the IT lift

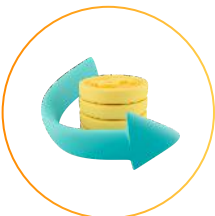
01



### Human-in-the-Loop

Our Digital Assistants work 24/7, with human oversight where judgment matters

02



### OPEX, Not CAPEX

Fixed monthly cost with ROI typically realized within weeks

03



### Local Expertise, Global Scale

Managing Partners who understand your market, backed by 500+ implementations worldwide

04

We work across finance, operations, HR, and revenue teams to remove friction, reduce risk, and create clarity without forcing one-size-fits-all technology decisions.

## Want Help Identifying What To Automate First?

Get Your Complimentary Assessment with a local Valenta Managing Partner to discover how to automate today. Our experts will review your current operations and show you exactly where you can **save time and save money.**

**Get Your Complimentary Assessment**



We Empower Businesses to  
Save More, Do More, & Stay Ahead  
With AI-Powered Intelligent  
Automation

## Your Intelligent Automation Partner

—“—

