



Are Your Systems Keeping Up With Your Growth?

A quick check-in for growing businesses

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Find out where disconnected apps, spreadsheets and manual workarounds are starting to slow your business down.

For owners, managers and finance leaders.

Growth should feel easier than this

At the start, most businesses run on a simple cloud accounting system, a few helpful apps and some spreadsheets. That can work well for a while — until it doesn't.

Use this short check-in to help you spot where operations are under strain across inventory, reporting and purchasing, and where connected workflows could help.

You'll look at four common pressure points:

- Your apps and spreadsheets
- Inventory visibility
- Reporting and decision-making
- Purchasing and supplier management

At the end, you'll get a simple score and a clearer view of where connected workflows could help most.

A better question than “Do we need another app?”

The real issue is often not missing software — it's a workflow that's becoming too hard to manage manually.



How to use this checklist

Read each statement and tick the ones that feel true in your business today. Do not overthink it. If something happens sometimes, that still counts. Add up your ticks in each section, then total your score at the end.

Total Score	What it means	Next step
0 - 4	Things feel under control	Keep processes documented and watch for repeat workarounds.
5 - 8	Friction is starting to show	Identify where handoffs are slowing people down.
9 - 12	Strain is becoming visible	Review where manual work is creating risk or delay.
13 - 16	The current setup is under pressure	Look at whether connected workflows would reduce rework and confusion.

What to notice

- The same spreadsheet gets used over and over.
- People check more than one system to find the right answer.
- Work depends too much on one person.
- A problem in one area creates knock-on issues elsewhere.

Important - A high score does not mean failure. It usually means the business has outgrown the setup that worked at an earlier stage

Chapter 1 — Apps, Spreadsheets & Workflow Complexity

Most growing businesses do not intentionally create operational complexity.

It usually develops one practical decision at a time:

- a spreadsheet for reporting,
- an app for inventory,
- another tool for quoting,
- another workaround for approvals.

The challenge is rarely the number of tools.
The challenge is the handoffs between them.

Tick the statements that apply

- ☐ We use spreadsheets to manage important operational workflows
- ☐ Staff manually move information between systems
- ☐ Reports are rebuilt in Excel or Google Sheets
- ☐ Different teams use different ways to track the same process
- ☐ Work slows down when key staff are unavailable

Score: _____ / 5

What to improve first

- Map one important workflow from start to finish
- Identify where information is copied or checked manually
- Look for repeated spreadsheet workarounds
- Prioritise workflows affecting inventory, purchasing, customer commitments or cash flow

Chapter 2 — Reporting & Visibility



Reporting friction usually appears when operational activity lives in multiple places.

Sales data, inventory, purchasing and financial information may all exist in different systems, spreadsheets or manual reports.

The issue is not simply producing reports.
It is creating reporting confidence.

Tick the statements that apply

- ☐ Reports require manual exports or spreadsheet consolidation
- ☐ Different systems produce conflicting numbers
- ☐ Teams debate which report is correct
- ☐ Reporting delays affect decision-making
- ☐ Management spends too much time reconciling information

Score: _____ / 5

What to improve first

- Identify which reports matter most operationally
- Trace where source data comes from
- Highlight where manual manipulation occurs
- Clarify how operational activity should flow into reporting

Chapter 3 — Inventory Visibility & Confidence

Inventory complexity often becomes visible before other operational problems.

As businesses grow, inventory affects:

- customer promises,
- purchasing decisions,
- cash flow,
- margins,
- and operational confidence.

Tick the statements that apply

- ☐ We regularly check stock manually because system numbers are not trusted
- ☐ Inventory adjustments happen outside the main system
- ☐ Stock shortages or urgent reorders happen more often than expected
- ☐ It is difficult to see committed stock or incoming supply clearly
- ☐ Stock value or margin reporting is difficult to trust

Score: _____ / 5

What to improve first

- Separate inventory accuracy issues from visibility issues
- Review how stock movements are updated
- Identify where stock decisions rely on manual checks
- Clarify how inventory activity connects to financial reporting

Chapter 4 — Purchasing & Supplier Coordination



As businesses grow, purchasing becomes more connected to inventory, sales demand, supplier performance and cash flow.

What begins as a simple reorder process can gradually become harder to manage:

- more suppliers,
- more approvals,
- more urgent orders,
- and more pressure on stock availability and customer commitments.

When purchasing workflows rely on spreadsheets, emails and manual coordination, visibility and control become harder to maintain.

Tick the statements that apply

- ☐ Reordering relies on spreadsheets, emails or manual checks
- ☐ Purchase orders, invoices or stock receipts require manual matching
- ☐ Supplier pricing or lead times are difficult to track consistently
- ☐ Purchasing decisions are not clearly connected to current stock or sales demand
- ☐ Urgent supplier orders or stock shortages happen more often than expected

Score: _____ / 5

What to improve first

- Map the process from sales demand through to supplier invoice
- Identify where approvals or supplier updates are disconnected
- Clarify how purchasing decisions connect to inventory and reporting
- Review recurring exceptions such as urgent orders or invoice mismatches



Your Overall Operations Score

Add your chapter scores together for a total score out of 20.

The goal is not perfection.

The goal is recognising where operational complexity may be limiting visibility, confidence or workflow continuity as the business grows.

Chapter	Area	Next step
1	Apps & workflows	___ / 5
2	Inventory visibility	___ / 5
3	Reporting & decision-making	___ / 5
4	Purchasing & supplier management	___ / 5
	Total	___ / 20

What your score means

- One high section: that workflow may need attention first.
- Two or more high sections: the problem may be connected, not isolated.
- High scores across all sections: the current operating model may be holding the business back.
- Low scores but growing volume: strain may appear soon as the business gets bigger.

A useful rule of thumb - If a problem needs information from more than one system to solve, it is usually a workflow problem.



What connected operations looks like

Connected operations does not mean replacing every useful tool overnight.

It means the core workflows that run the business are connected enough that people can work from the same information, trust the numbers and spend less time coordinating manually.

Stage	Typical setup	What happens	Risk
Accounting-led	Cloud accounting	Financial basics are covered.	Operations stay mostly manual.
App-extended	Accounting + apps	Specific problems get solved.	Handoffs increase.
Workaround-led	Apps + spreadsheets	People keep the business moving manually.	Visibility drops.
Operations-led	Single connected platform	Sales, stock, purchasing and financials work together.	Stronger control and clearer insight.

Connected workflows should help you answer:

- What stock do we have, where is it, and what is it worth?
- What has been sold, ordered, received and invoiced?
- Which supplier decisions affect our ability to fulfil demand?
- Where are margin, stock value and cash flow being affected?
- Can staff see what they need without asking the owner?

The outcome - The business moves from chasing information to running from it.

Questions to ask before adding another app



Another app can be the right answer when it solves a truly isolated problem.

But if the real strain is caused by disconnected workflows, another tool may just create more checking, more exporting and more rework. These questions help you decide whether you need a new app or a better workflow.

Question	Why it matters
Will this remove a handoff or create another one?	Adding another place to check can increase strain.
Where will the source of truth live?	The business needs one clear answer for each key question.
How will this affect inventory, purchasing, sales and reporting?	Changes in one area usually affect the others.
Who will maintain the data?	Manual upkeep gets more expensive as the business grows.
What happens when the owner is not involved?	Scalable systems should not depend on one person remembering the workaround.
Can this support the next stage of growth?	Choose tools that reduce complexity as volume increases.

The decision shift - Do not just ask what feature is missing. Ask what workflow is breaking.



How Infusion helps

Infusion is built for growing businesses that need more than disconnected apps and spreadsheets.

It helps bring sales, inventory, purchasing, financial activity and reporting into one connected way of working, so teams can rely on clearer information and spend less time on manual rework.

Infusion helps growing businesses:

- Replace spreadsheet workarounds with connected workflows.
- Manage inventory, sales, purchasing and financial activity in one platform.
- Improve visibility over stock, costs, commitments and performance.
- Reduce manual rework caused by duplicated data.
- Give teams a clearer way to work as the business grows.

Before

Apps multiply. Spreadsheets fill the gaps. Reports take time. People ask the owner for answers. Inventory and purchasing decisions rely on manual checks.

After

Core workflows are connected. Data is easier to trust. Teams work from the same information. Leaders can see issues sooner.

What to do next

Review your score with your leadership, finance or operations team.

Start with the section that scored highest and map that workflow from start to finish.

Look for the places where information is copied, exported, checked or rebuilt in more than one place.

If you found the same problem appearing in multiple sections, the issue is likely not the team. It is the workflow.



Ready to see what connected could look like?

Talk to Infusion about your operations strain. Book a conversation to explore where disconnected workflows are creating friction, and where a single connected platform could help restore control.