## Business Check-in

# Is your business becoming harder to run as it grows?

A practical 5-minute check-in for growing wholesale, retail and job-based businesses

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## See where your business stands today

For owners, managers and finance leaders.

As your business grows, there's naturally more to manage. More customers, orders, stock and transactions all create more activity.

Over time, new tools, spreadsheets and workarounds can become part of everyday operations. Individually they may work well, but together they can create extra steps, manual work and make it harder to get a clear view of the business.

This 5-minute Business Check-in helps you spot where that may be happening across 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 result and a clearer view of where your business stands today and help you identify any opportunities to simplify.

**Identify opportunities to simplify operations, improve visibility and reduce manual work so your business stays easy to run as you grow.**

### 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+ | 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.**

## One more thing to ask yourself...

Operational challenges aren't always caused by processes alone. Sometimes they're caused by knowledge becoming concentrated in one person.

**Tick any that you feel true:**

□ Too much operational knowledge sits with one person

□ Work slows down when the owner, manager or spreadsheet expert is away

□ Staff regularly ask the same person for answers the system should already provide

□ Important reports or decisions depend on someone manually preparing or checking the numbers

□ The business would struggle if that person was unavailable for a week.

**If you ticked one or more...**

Your challenge may not just be a process issue. It could be a control and continuity risk.

When important knowledge lives in people instead of systems, growth becomes harder, decisions take longer, and the business becomes more vulnerable whenever that person is unavailable.

## 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.