

Efficiency Matrix – Example CRM & Process Automation Upgrade

Epic #	Epic Name	Impact	Quadrant*	Rationale
1	Quote-to-Invoice Automation	High	Quick Return	Removes manual steps, accelerates revenue collection, and supports scaling without adding extra admin.
2	Stock Allocation & Supplier Ordering	High	Quick Return	Prevents fulfillment delays, automates procurement, and improves accuracy in delivery and customer satisfaction.
3	Scheduling Enhancement	High	Quick Return	Improves visibility, reduces scheduling errors, and streamlines coordination across teams.
4	Automated Customer Communications	High	Quick Return	Delivers consistent, branded, and timely messages, improving customer experience while reducing admin effort.
5	Website Integration	High	Quick Return	Ensures accurate, real-time data between website and internal systems, eliminating duplicate entry.
6	Profitability Reporting	High	Strategic Play	Enables real-time margin tracking and better decision-making; relies on accurate, automated data from earlier work.

7	Data Standardisation	High	Foundational	Creates a clean and consistent dataset, enabling all other reporting and automation to function reliably.
8	Compliance Documentation Automation	Medium	Quick Win	Quickly provides value by automating compliance-related document creation and record keeping.
9	Courier/Logistics Tracking Automation	Medium-High	Quick Return	Reduces manual dispatch work and improves post-sale customer experience.

ADAM WINCHESTER - EXAMPLE DOCUMENT

Quadrant Definitions

- **Quick Return:** High impact / moderate to high effort – worth early investment for immediate value.
- **Quick Win:** High impact / low effort – implement first to build momentum.
- **Foundational:** Must be completed early as it enables other improvements.
- **Strategic Play:** High impact but only fully valuable once prerequisites are complete.

Matrix Insights

- **Earliest Wins:** Low-effort foundational or compliance-focused tasks provide quick payoff and enable further automation.
- **Core Automation Layer:** Automations in quoting, invoicing, stock allocation, scheduling, and customer communications deliver both operational and customer benefits early.
- **Integration Boost:** Connecting the website and logistics systems further enhances productivity and customer satisfaction once core workflows are stable.
- **Strategic Finale:** Profitability reporting comes last, using clean, automated data to drive insights and decision-making.

Delivery Priorities Summary

1. **Data First** – Standardise data before automation.
2. **Automate Core Processes Early** – Start with quoting, invoicing, and stock allocation.
3. **Enhance Customer-Facing Processes** – Add scheduling and communication improvements.
4. **Integrate External Systems** – Link website and logistics providers.
5. **Conclude with Analytics** – Deliver advanced reporting once data integrity is assured.