Find the workflow that's costing you most: a checklist and a worked sample

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Start here

Double data entry is not a people problem. It is usually a handover problem. The work is real. The retyping is often unnecessary.

This guide helps you find the one workflow worth fixing first. There are four steps:

1. List the repeat handovers in your business.
2. Size each one in hours and in dollars, apart.
3. Test whether your software's own settings are enough.
4. Decide what to fix first, or leave alone.

Three rules run through it.

- **Hours are time. Dollars are cash.** The two never share a column. Hours turn into cash only if paid hours go.
- **Running costs sit beside any saving.** Software, AI usage and support all count.
- **Sample figures are labelled sample.** This is a working checklist, not a claim about your savings.

I am a Chartered Accountant (CA ANZ) and Xero certified. I design and build every workflow myself, on the software you already run.

Step 1: list the repeat handovers

Pick one piece of information that gets entered repeatedly: a customer name, a job number, an invoice amount, new-starter details or a lead. Write down where it starts, who copies it and where it must end.

Then tick everything below that happens in your business at least weekly.

Re-keying between systems

☐ A job, quote or order is typed into one system, then typed again into another. Job software to Xero or MYOB, or a CRM to a spreadsheet.

☐ Codes, such as accounts, tax codes, tracking categories or cost centres, are chosen in two places.

☐ A purchase is typed again as a bill, although the order or quote already exists.

☐ A report is exported, pasted into a workbook and adjusted every month.

☐ A result is typed into an email, then typed again into a record.

Chasing approvals and people

☐ A supplier bill sits until the owner or a manager says yes.

☐ Someone emails staff for their figures, then adds the replies up by hand.

☐ A quote or proposal waits for a follow-up that happens from memory.

☐ Overdue invoices are chased when someone remembers.

Checking documents against orders

☐ Someone checks each supplier bill against its purchase order or quote, by eye.

☐ Someone checks each invoice against the quote and the timesheets before it goes out.

☐ Someone searches to see whether a bill was already entered.

☐ A customer's purchase order arrives as a PDF and is typed into an invoice.

Four questions for every item you ticked

1. Which system should own this record?
2. Is the next step a repeatable rule or a judgement call?
3. What must be checked before it moves?
4. What happens when the information is missing or unusual?

Do not guess how often it happens. Count it for a week: how many times it is entered, and how long it waits.

Step 2: size each handover, in hours and in dollars

Copy one row for each ticked item.

Handover	Hours a week	Hours a month	Cash a month	Running costs a month	Net cash a month

How to fill it in

1. **Hours a week.** Time it for one week. Include the waiting. Hours a month is hours a week times 4, which treats four weeks as a month.
2. **Cash a month.** Write only what a record shows: a duplicate bill paid, an extra never billed, freight not charged. Do not multiply hours by a wage. If you cannot point to a record, write "not measured". A blank is a finding.
3. **Running costs.** Software and AI usage are paid to the providers. Optional support starts from A$350 a month. For a build, the audit estimates both before you commit.
4. **Net cash.** Cash less running costs. Leave the hours out.
5. **Rank twice.** Rank on hours. Then rank again on cash. A workflow that ranks high on both goes first. A workflow high on hours alone gives you capacity, so decide what the team will do with that time.

A worked sample

Sample Trade Supplies is a made-up wholesaler of cleaning and packaging supplies. It has 22 staff and runs on Cin7 for stock and orders and Xero for the accounts. The sample reviews four weeks: 520 sales orders and 31 quote requests. It treats those four weeks as a month. Every figure is invented. This is a sample, not a client.

Handover	Hours a week	Hours a month	Cash a month	What the records show
Check about 130 invoices a week against the orders	8	32	A$1,190	17 invoices missing the freight charged on the order
Reply to quote requests	Not timed	Not timed	Not claimed	12 of 31 waited more than two days. Reps did not record lost orders
Match customer payments in Xero	Not timed	Not timed	Not claimed	14 payments sat unmatched for more than a week, so statements showed paid customers as overdue
Margin by product	Not applicable	Not applicable	Not applicable	Freight in and duty are on supplier bills in Xero, not on the stock in Cin7

Here is where the A$1,190 comes from.

Freight service	Orders	Freight per order	Undercharged
Metro courier, small orders	5	A$45	A$225
Metro pallet	7	A$70	A$490
Regional courier	5	A$95	A$475
Total	**17**		**A$1,190**

What the sample decides

- **Invoice checking goes first.** It is the only row with both hours and cash measured. It is 32 hours of time and A$1,190 of cash. The two are not added.
- **Quote replies and payment matching need timing first.** The sample audit report still recommends the quote follow-up, because waiting is the cost. Time both for a week, then rank them. No dollar figure is claimed, because nothing was recorded to support one.
- **Margin by product is not yet.** Record landed cost on the stock for six to eight weeks, then look again. A margin report today would show margins that are too high.

Running costs beside the saving. With optional support at A$350 a month, the A$1,190 leaves A$840 a month. Software and AI usage are extra, and the audit estimates them. Against an Invoice Check build of A$3,900, that pays back in about 5 months before software and AI usage, if the freight on every order is billed. The office approves every flagged invoice before it is posted.

The test: native settings or a build

Start with the software you already pay for. A build you did not need is the dearest build. Do not automate a bad handover. Connecting two messy processes can make errors move faster.

Ask five questions in order.

Question	Settings are probably enough if	A build is worth a quote if
1. Where is the gap?	It sits inside one system	It sits between two systems, such as a bill in one and its order in another
2. Does the vendor document it?	The vendor's own help describes the setting and your plan includes it	The help does not describe the check you need
3. Does the setting cover the whole step?	It covers the handover from start to finish	It covers one part, such as a check that runs after the entry
4. Is the next step a repeatable rule?	The step is a judgement call that a person makes each time	A rule can decide the routine cases: a total that agrees, a reference that exists, no duplicate
5. Does the sizing justify it?	Hours are few and no cash is recorded	Net cash after running costs, or hours you will put to use, are worth the build

Two examples from the vendors' own pages.

- Xero says it "compares the contact, reference and amount of all the bills and credit notes in your organisation and identifies any that are potential duplicates". That review runs on bills already in Xero. A check before entry stops a duplicate before anyone codes or approves it. (Xero Central, "Review duplicate bills or credit notes", https://central.xero.com/s/article/Review-duplicate-bills-or-credit-notes, read 25 October 2026.)
- MYOB's help for MYOB Business and AccountRight does not describe an approval step for bills. (MYOB Support, MYOB Business, "Entering purchases", https://www.myob.com/au/support/myob-business/purchases/entering-purchases, read 25 October 2026.) Check your own product and file. The answer changes between them.

Settings can win outright. In one of my sample audits, collecting monthly figures took about 4 hours a month. That is time, not dollars, and it was too little to justify a KPI Report build. One shared sheet that each person fills in was enough. A "not worth building" is a finding too.

Where a build is worth it, a person stays in charge. Rules do the totals, the matches and the reference checks. AI reads documents and drafts notes. Nothing is sent or paid without a person approving it.

Your next step

Start with a free fit check by email at worksbetter.ai

Send the form with your software, the workflow, your team size and your timing. I reply by email, usually with a question or two, and tell you whether it is a fit. No call needed. Please do not send passwords or confidential records through the form.

If it is a fit and you want a clear answer on one workflow, the next step is the Workflow Audit:

- A 60-minute call and a read-only review of one workflow, up to two connected systems and a four-week sample of its records, with a written report in 5 working days, starting once access is granted.
- A clear decision: build it, change a setting or not yet, with a fixed quote if a build is worth doing and the point where a person approves.
- A$1,500 (AUD, no GST charged), credited in full to a build signed within 30 days.
- The report is yours whether or not you build with Works Better. If nothing is worth building, it says so.

Builds start from A$3,900. Every build has written acceptance criteria and 30 days of fixes, and runs in accounts in your name. Prices are in AUD, no GST charged.

General information only. Sample figures are invented to show the method.