BECOMING AN INFORMATION CONSCIOUS BUSINESS

Simple steps to realising the value of information in your business.

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ABOUT JAMES

I'm James Geldart the Founder of Nuvola. We are a boutique software development company which works with businesses large and small, from solopreneur personal trainers, academic institutions to multi-million ..... To help them realise their potential by becoming "information conscious" and using IT applications to create sustainable, efficient, profitable enterprises which can deliver great customer service.

In this guide you will find out what an information conscious business is and how you can develop it in your business. You will find a step by step guide to reviewing your systems and processes and identifying where and how IT could help you make the most of them. This is the approach we use with our clients at the scoping stage.

If you follow these steps in this guide you will have a clear picture of where the untapped potential of information in your business lies and the priorities for development. To help you decide what to do next, I have also included an evaluation of the pros and cons of buying off the shell systems or going bespoke.

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Introduction

What does being ‘information conscious’ mean?

When data is stored in different systems (or even in people’s heads!) that don’t communicate well, it leads to inefficiencies, confusion, mistakes, and wasted time. Becoming information conscious means ensuring that all your business data is well-organised, connected, and easy to access allowing you to make better decisions, serve customers more effectively, and operate efficiently. This can be a great source of competitive advantage.

Fundamentally, it means recognising that your business data is as a valuable an asset, as the tools you need to deliver your product/service.

This guide provides actionable steps to help you streamline your business operations by managing information in a smarter way.

Stranded on an information island

Businesses often have isolated pockets of data that don't talk to each other. These "information islands" could be different software, departments, or systems. For example, customer records might be stored in one place, but billing information is kept elsewhere. When these systems are disconnected, it slows down customer service, creates confusion, and makes it difficult to get a clear view of what's happening in the business. Often, humans and manual processes form the bridge between these islands with the inevitable risk of error or delay.

Identifying common information islands

Recognising and identifying the specific areas in your business where information is isolated is critical to solve information island problems. Some typical examples include:

- Customer Data (CRM): Is your customer information easily and appropriately accessible to everyone who needs it?
- Project Deliverables: Are project files and progress notes stored separately from client details?
- Finance and Billing: Can your team see what's been invoiced, paid, and pending? Can billing see when a project has completed or the materials used to complete a job without having to follow up with staff or wait for a physical report?
- Purchasing and stock: Do your purchasing and stock management teams use separate systems, and how often is information manually transferred between them?

By identifying these areas, you can begin to address the lack of connections and clunk processes, and improve how information flows across your business.

How to address the gaps

This is one of the processes we use to help clients identify issues in their businesses.

Once you've identified the key areas in your business where information is stored, such as customer details, project plans, or inventory data, it's time to assess where the gaps exist. Addressing these gaps will help improve the flow of information across departments, allowing your business to run more efficiently.

- Map out your information islands
- Start by gathering your team (or doing this solo if you're a small business) and creating a physical or digital map of where all your business's information is stored. Use tools like Post-its to list key data areas, things like customer information, schedules, and billing records.
- For each area, specify:
  - What kind of information it holds.
  - How it's stored (e.g., spreadsheets, CRM software, email).
  - Who needs access to it.
- By identifying these data islands, you can better understand where the disconnects are.
- Assess the flow of information

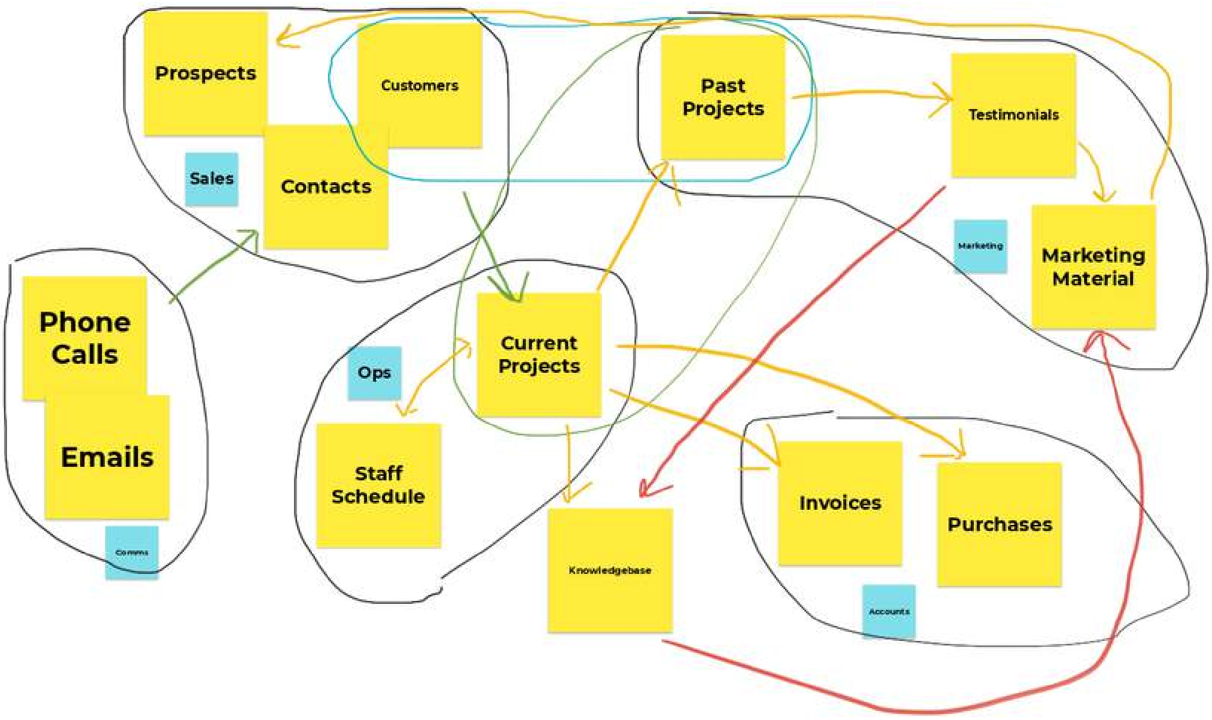
Once your information islands are mapped out, you need to evaluate how well these different areas communicate with one another. Draw arrows between them to indicate the flow of data. For example, does your customer data seamlessly connect with your billing system?

- Next, use a simple colour-coding system, for example:
  - Green: Flows that work smoothly and don't need much improvement.
  - Orange: Flows that function but could be better streamlined.
  - Red: Flows that are nonexistent or broken, leading to major inefficiencies.

This simple visual will give you a clearer understanding of where the bottlenecks are and where improvements need to be made.

This exercise can be extremely revealing and creates and asset in its own right. Not only does it show where processes and systems can be improved, but also where there are risks and issues. It also gives your team an opportunity to share any concerns they have with your current systems, and to have input to the solutions.

The example below is how this might look.



You can then document each individual flow, for example:

Current Projects -> Purchases

Status: Yellow

We are able to produce a list of purchases per project from the project spreadsheet, and these are then uploaded into the finance system. However this whole process is quite clunky and relies one workbook per project.

Creating a stream of information

Creating a seamless stream of information across your business is crucial. This involves setting up systems where data can flow between departments and teams without barriers. This flow means that whether someone is dealing with a customer, managing a project, or handling billing, they always have the right information at their fingertips.

Ensuring effective information flow

As your business grows, managing an increasing amount of information can become overwhelming. You may have started with simple tools, but now you need something more sophisticated to handle the workload.

Improving information flow means setting up tools and processes that allow your business to handle more data without getting bogged down. Automation can play a big role in this, automating routine tasks like sending invoices, tracking project milestones, or updating customer records can save time and reduce mistakes. At the same time, it's important to make sure your systems scale as your business grows. This way, your team can continue to perform efficiently even as the volume of information increases.

Getting down to the specifics

Now you've got an overview of where your issues might be, the next step is to turn them into a set of functional requirements. This is vital before you move on to selecting and implementing a system. Without clear requirements, systems are often built that don't match the business's needs.

One way of doing this is to use a functionality matrix to help translate your strategy into clear systems requirements. This tool allows you to break down your business goals into specific actions and features that your systems need to support. For example, if your strategy includes improving customer service, the matrix would identify the tools needed to track customer history, automate follow-ups, and measure customer satisfaction. With this approach, you can be sure that your systems support your goals effectively.

Row	Title	1	2	3	4	5	6	7	8
A	Member Management	Manage Organisations	Manage Contacts	Manage Membership	Automated Joining Online	Manage Membership Levels & Fees	Assign Assessment to membership level	Automated Renewal Process	Log contact activity
	Priority Score	9	9	6	6	6	6	6	6
B	Registers	Create Register	Set Register Fees	Assign Assessment to register	Automated renewal reminders	Fee seperation			
	Priority Score	9	6	6	6	9	0	0	0
C	Assessments	Manage Assessment Questions	Create Assessment Types	Complete Assessment Questionnaire	Assign to Assessor	Assess Answers	Notify Pass/Fail		
	Priority Score	9	6	9	6	6	9	0	0
D	Event Management	Create Events	Set Event Fees	Create Event Templates	Book Events Online	Book Events Offline	Send Event Reminders	Log attendance	Perform Event Follow-up
	Priority Score	9	9	9	9	6	9	6	9
E	Website	Integration with Drupal							
	Priority Score	9							
F	Finance Integration	Create Invoices and Receipts	Take Card Payments online	Take Card Payments with virtual terminal	Refunds	Direct debit integration	Membership fee frequency	Cards first system	
	Priority Score	9	9	9	6	3	6	9	0
G	Marketing	Synchronise with Mailchimp	Synchronise Mailchimp Activity	Create Landing Pages	Web Statistics	Goal Tracking	Mailing plat form - mosaico	Tailoring content to peoples behaviour	Marketing segmentation
	Priority Score	6	6	6	6	6	9	6	9
H	Accreditation	Manage Accreditations							
	Priority Score	1							
I	Reporting	Website Reports	Membership Reports	Assessment Reports	Accreditation Reports	Event Reports	Finance Reconcilliation Reports	Audit requests	GDPR Requests
	Priority Score	9	9	6	6	9	9	9	9

Building the Matrix

The example matrix above is from a membership organisation, but the principle applies to any business. The rows of the matrix form broad functional areas, and the cells are the individual requirements. The colour coding (in this case orange, amber and white for high/medium/low) indicates priorities.

Each cell has more data behind it, providing a further description. In the above example, cell F1, Create Invoices and Receipts has the description *"Invoices and receipts for event bookings and membership/register fees should automatically be created in the finance system as part of the booking/payment process, and then sent to the customer. The logic should be used to ensure VAT etc is accounted for correctly."*

Further, each cell is given high/medium/low scores for business benefit (how much this will impact the business), technical simplicity (how easy is this to implement), and organisational readiness (can the business implement this function easily, or are process and procedure changes needed). These three are combined to calculate a priority score and hence colour coding, which can be used to get 'quick wins' on the project.

We have created a template in Google Sheets which will get you started. To summarise:

- **Identify functional areas:** Start by listing broad functional areas relevant to your business, like CRM, Project Management, or Inventory Management.
- **Break down requirements:** For each functional area, break it down into individual requirements. Describe what each requirement entails and its importance.
- **Set priorities:** Determine the priority for each requirement (e.g., High, Medium, Low) based on your business needs and objectives.

Feel free to adapt the matrix based on your needs and the functional areas relevant to your business. This will help you choose the right tools and ensure they align with your requirements.

Bespoke vs off-the-shelf systems

Businesses often struggle with the decision of whether to invest in custom-built software or opt for an off-the-shelf solution. Each has its pros and cons, and making the wrong choice can lead to wasted time and money. Let's dive into what they are and how you can use them.

Bespoke systems

A bespoke system is software that's built specifically for your business. It's designed to meet your unique needs and can be tailored to handle the exact processes and requirements your business demands. This level of customisation allows for greater flexibility, as the software is crafted with your operations in mind, enabling you to include features that are often not available in off-the-shelf solutions.

Advantages:

- ***Tailored to Your Business:*** A bespoke system can be moulded to fit your exact workflows, meaning you don't have to adapt your business to fit the software.
- ***Scalability:*** As your business grows, bespoke software can be expanded and updated to accommodate new features, processes, or integrations, keeping it aligned with your evolving needs.
- ***Integration with Existing Systems:*** If you already have software in place, a custom solution can be designed to integrate seamlessly with your existing platforms, reducing the disruption to your operations.
- ***Competitive Advantage:*** Since no other company will have the same system, it can give you a competitive edge, helping you operate more efficiently and uniquely compared to others using standardised solutions.

Drawbacks:

- ***Higher Initial Cost:*** The custom development of bespoke software requires significant investment, both in terms of time and money. The upfront costs tend to be higher due to the personalisation involved, although you don't have to pay for user licences.
- ***Longer Development Time:*** Creating a bespoke system from scratch takes more time than purchasing ready-made software. It could take months or even years depending on the complexity of the system.

- ***Ongoing Maintenance:*** Custom-built systems require continuous maintenance and updates, which might require hiring a dedicated team or relying on a third-party developer.

Is a Bespoke System Right for You?
If your business has very specific needs or if there are certain processes that off-the-shelf solutions can't support, a bespoke system might be the best option. For example, if your business handles unique customer interactions or has specialised workflows that standard software struggles to manage, investing in bespoke software could streamline operations and improve efficiency.

However, if your budget is limited and you need to move quickly, it may not be the best fit. The key is to assess whether the long-term benefits of customisation will outweigh the initial cost and time investment.

Off-the-shelf systems

An off-the-shelf system is a ready-made software that's developed to cater to the general needs of a wide range of businesses. It's quicker to implement since it's already built, and because it's designed for broader use, it usually comes at a lower price point than bespoke solutions. Off-the-shelf software is often suitable for businesses that require standard features for tasks such as accounting, customer relationship management (CRM), or project management.

Advantages:

- ***Lower cost:*** Off-the-shelf software is typically less expensive than custom-built solutions. There's no development cost, and you can start using it immediately after purchase.
- ***Immediate implementation:*** Since the software is ready-made, it can be deployed quickly. Businesses that need a solution fast can benefit from the speed at which off-the-shelf systems can be integrated.
- ***Ongoing support:*** Most off-the-shelf software providers offer customer support, updates, and bug fixes as part of the package. This ensures the software stays current and functional without the need for in-house IT support.
- ***Established user base:*** Popular off-the-shelf products usually have a large user base, meaning you can find plenty of tutorials, reviews, and advice on how to get the most out of the system.

Drawbacks:

- ***Limited Customisation:*** Off-the-shelf software is designed for a wide range of businesses, meaning it might not be able to meet all your specific requirements. You may need to adapt your processes to fit the software.
- ***Scalability Issues:*** While many off-the-shelf solutions offer some scalability, they may not grow with your business as seamlessly as a bespoke system. As your business evolves, you could find that the software becomes limiting.
- ***Compatibility with Existing Systems:*** Off-the-shelf systems are designed to be general, so they may not integrate well with other software your business is already using, leading to potential inefficiencies or the need for workarounds.

Is an Off-the-shelf system right for you?

Off-the-shelf software is an excellent choice for businesses that need a quick, affordable solution for standard processes. It's perfect for those who don't have highly specialised requirements and can work with the features the software provides out of the box.

However, if your business has complex needs or if you find yourself needing to customise the software heavily, you may find that the limitations of off-the-shelf products slow you down in the long run. It's important to carefully evaluate how well the software will integrate with your current systems and whether it can grow with your business.

The Best of Both Worlds?

Although we do build fully bespoke systems, we often find that a hybrid solution can be the best for our clients. Rather than start from scratch, we take an existing platform and customise it for our clients. A great example of this was ACH, an insurance claims handler. We took our existing CRM system and customised it extensively for them, costing them significantly less than a fully bespoke system, which still being tailored to just the way they need it to work.

Conclusion: Creating a Truly Information-Conscious Business

Becoming information-conscious is more than just keeping tabs on your data; it's about shaping a business environment where information flows seamlessly, empowering every department, every team member, and every process. Having disjointed information or outdated systems can lead to poor communication, wasted time, and even costly mistakes.

By identifying information silos, improving the flow of data between teams, and choosing the right systems for your specific needs, you set the foundation for a business that's not just efficient but also scalable. An information-conscious business is agile, adaptable, and capable of delivering consistent results, whether that's serving clients better, hitting project deadlines, or optimising day-to-day tasks.

Now is the time to take control of your business's information flow. **Audit your current systems,** address the bottlenecks, and explore how you can create a well-organised, fully integrated data environment.

Take the first step towards efficiency today

If managing your information feels overwhelming or if you're unsure how to streamline your data flow, don't worry—help is at hand. At Nuvola, we specialise in helping businesses like yours identify and eliminate information barriers, creating smoother operations and setting you up for scalable growth.

Book your free 30-minute consultation today and find out how we can help you implement the right systems and processes to boost your business efficiency. Let's discuss your pain points and create a clear action plan to help you manage your information more effectively.

Don't wait until inefficiencies hold you back, take charge of your information flow and start running your business more smoothly than ever before.

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