



From friction to flow

A practical guide for SMEs improving operations with better processes, software and AI.

How to find the work worth fixing, choose the right level of technology and prove the change — without launching a transformation programme.

Most of the saving is not automation. It is work that stops happening.

Technology does not transform a business. A business changes how it works — and technology makes the better way easier to repeat.

A field guide, not a technology catalogue.

Read it front to back, or take one real workflow and use the practical pages as a leadership workshop.

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Small firms do not need digital theatre.

They need important work to become faster, clearer, more reliable and easier to scale.

Small and medium-sized firms are full of capable people compensating for imperfect systems. They remember the exception, copy the information, chase the handover and fix the spreadsheet. The business keeps moving, but its best people become the integration layer.

Software and AI can change that. But buying a tool before understanding the work often relocates the friction instead of removing it. The team gets another login, the data fragments again, and the promised benefit becomes difficult to prove.

Our approach starts with the operating reality: what triggers the work, who needs the outcome, where it stalls, what judgement is involved and what a better result would be worth. Only then do we decide whether the answer is a clearer process, better use of an existing system, integration, automation, AI or purpose-built software.

This guide is our practical method for making that decision. It is written for firms without enterprise transformation teams, unlimited budgets or time to waste.

The operational advantage is not having more software. It is making the right work easier to repeat.

Kieran McCloud — Co-Founder, Prodro

AI use is rising. Operational depth is not.

The opportunity for SMEs is real, but the route to value has less to do with access to tools than with choosing and embedding the right use case.

35%

of UK businesses with 10 or more employees reported using at least one AI technology in June 2026, up from around 12% in September 2023.

ONS [1]

28%

of businesses with 0–9 employees reported AI use, against 49% of firms with 250 or more people.

ONS [1]

1.6

AI technologies were used on average by an adopting business — up from 1.4 in 2023, so adoption has widened far faster than it has deepened.

ONS [1]

39%

cited difficulty identifying activities or business use cases as a barrier to adoption.

ONS 2023 research [2]

The bottleneck is not awareness. It is turning a broad technology possibility into a specific operational improvement that people can adopt and leaders can measure.

The OECD also identifies cost, relevance and trust in vendors as important barriers for UK SMEs [3]. A credible partner therefore has to be willing to recommend what not to buy, not only what to implement.

When the tool becomes the strategy.

The failure is rarely dramatic. It is usually a slow accumulation of workarounds, exceptions and unclear ownership.

01 A tool is selected

The category looks promising, but the operating problem is still broad.

02 The process bends around it

People adapt locally while the end-to-end workflow remains unchanged.

03 Exceptions multiply

Manual checks and spreadsheets reappear at the boundaries.

04 The benefit becomes vague

Usage is measured, but time, quality, margin and customer impact are not.

05 Trust falls

The next technology decision becomes harder, because the last one never proved itself.

Understand the work → simplify the process → define the outcome → fit the technology → test in operation → scale only what proves useful.

Five principles for practical digital improvement.

These principles keep a project tied to the operating result rather than the novelty of the technology.

01 Start with friction, not features

Find the repeated delay, error, handover, workaround or missed opportunity before discussing a solution.

02 Fix the rule before automating the task

If nobody agrees what should happen, software can only make the disagreement faster and harder to see.

03 Use the lowest sufficient level of technology

A template, a configuration change or an integration may create more value than a custom build.

04 Keep human judgement where consequence is high

AI can prepare, classify and recommend. Accountability stays with a named person.

05 Prove value in the live workflow

A prototype is useful only when it tests behaviour, operational fit and a measurable outcome.

If the right answer is a £20 tool you can buy tomorrow, that's the answer we'll give you.

Five moves from operational friction to measurable flow.

The method stays technology-neutral until the work, the value and the constraints are understood. It is the working detail inside the four stages Prodro takes every engagement through.

Understand	Decide	Deliver	Prove
See how the operation actually works, not how the process says it works.	Determine what should change and why.	Put the agreed changes into practice, with clear ownership.	Measure what improved: time, cost, capacity or quality.

01	Find friction	Understand
See where the real work stalls, repeats or relies on memory.		
02	Quantify impact	Understand
Translate annoyance into time, cost, quality, risk or growth.		
03	Redesign the work	Decide
Remove waste and clarify rules, ownership and exceptions.		
04	Fit the technology	Decide
Choose from the six decisions.		
05	Prove and scale	Deliver + Prove
Test the new flow with users, metrics and a decision date.		

Move through the method quickly on a small workflow. Depth should follow evidence, not precede it.

01 Find the real friction.

Observe the workflow as it happens. The visible complaint is usually downstream from the actual constraint.

Ask

Start and finish

Name the trigger, the final outcome and the people who touch the work.

Do

Watch the work

Use real examples, screen-sharing and recent cases rather than an idealised process map.

Working notes

- 01 What happens immediately before this work starts?
- 02 Where does information wait, change hands or get re-entered?
- 03 Which exception consumes disproportionate attention?
- 04 Who feels the impact — customer, colleague, manager or supplier?

Watch for

Jumping to the most vocal complaint, or assuming every manual step is waste.

Leave this move with

A specific workflow, an observable constraint, and the people affected by it.

02 Quantify the value.

Convert friction into a business case that can survive a budget conversation. The calculator on prodro.co.uk does this arithmetic for one workflow.

Ask

What changes?

Time, delay, rework, risk, conversion, capacity, customer experience or decision quality?

Do

Build a baseline

Use a small sample if necessary, but define the denominator and the current state.

Working notes

- 01 How often does it happen?
- 02 How many minutes or hours does one instance consume?
- 03 What error, delay or lost opportunity follows?
- 04 Which metric would move if the flow improved?

Watch for

Invented ROI, or treating every saved minute as cash that immediately leaves the cost base.

Leave this move with

A baseline, a target range, and one primary outcome metric.

03 Redesign the work.

Remove unnecessary complexity before asking technology to carry it.

Ask

What is essential?

Separate the purpose of the workflow from the habits and exceptions accumulated around it.

Do

Make it explicit

Define the common path, the exception path, decision rights, data needed and ownership.

Working notes

- 01 Can a step be removed?
- 02 Can an approval rule be simplified?
- 03 Can ownership be made explicit?
- 04 Can the common path and the exceptions be separated?

Watch for

Digitising every current step, preserving redundant approvals, or ignoring the people who absorb the exceptions.

Leave this move with

A simpler target workflow that people recognise and can follow.

04 Fit the technology.

Choose software and AI in proportion to the job, the risk and the strategic value.

Ask

What capability is missing?

Recording, coordinating, integrating, automating, interpreting, or enabling a distinctive service?

Do

Name the decision

Each finding is answered by one of six decisions. Work out which one this is, and why.

Working notes

01 What is already available in current systems?

02 Does the work use rules, judgement, or both?

03 Is the input structured or messy?

04 Is the workflow strategically distinctive?

Watch for

Choosing a platform because it is fashionable, over-engineering a low-value workflow, or underestimating support.

Leave this move with

A justified decision, with clear boundaries, owners and dependencies.

05 Prove and scale.

Put the better flow into real work, and use evidence to decide what happens next.

Ask

What would convince us?

Define acceptable quality, adoption and business outcome before the pilot begins.

Do

Run the smallest live test

Include real users, real exceptions, monitoring and a fixed decision date.

Working notes

- 01 What is the smallest live pilot?
- 02 What is the baseline?
- 03 Who owns adoption and exceptions?
- 04 What evidence triggers scale, change or stop?

Watch for

Declaring success because a demo works, or scaling before the team can operate and support the new flow.

Leave this move with

A scale, revise or stop decision, backed by operational evidence.

Every finding is answered by one of six decisions.

These are not rungs to climb. Each has its own trigger, and the work is naming which one a finding actually is.

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|----|--------------------|---|
| 01 | <u>Stop</u> | The work serves no useful purpose. Remove it. |
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|----|------------------------|---|
| 02 | <u>Simplify</u> | The process is more complicated than the job requires. Redesign it. |
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|----|-------------------|--|
| 03 | <u>Buy</u> | Someone has already solved this properly. Use their product. |
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| 04 | <u>Automate</u> | Repetitive human work that technology can absorb. |
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| 05 | <u>Connect</u> | The problem exists because systems don't talk to each other. |
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| 06 | <u>Build</u> | The right solution doesn't exist. Create it. |
|----|---------------------|--|
-
- Most operational problems cross people, process and technology. Fixing one layer often just moves the work somewhere else.
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AI is most useful at the boundary between messy input and structured action.

It can read, classify, extract, draft, summarise and recommend. The business still needs a process, an owner and a definition of acceptable output.

Signals that AI may help

High-volume text, documents, images or conversations

A clear next action after interpretation

Outputs that can be reviewed or reversed

Enough examples to test quality and edge cases

A measurable reduction in delay, effort or inconsistency

Signals to pause

A broken or disputed process

High-consequence decisions with no accountable reviewer

Sensitive data in unapproved tools

No baseline or accepted quality threshold

A vague goal to "use AI" rather than improve an outcome

AI prepares → a person reviews → software records or triggers the approved action → the team monitors exceptions and quality.

As confidence and evidence grow, the human checkpoint can move. It should never disappear merely because the demo looked convincing.

AI should reduce the cost of good judgement, not remove responsibility for the outcome.

Seven questions before AI touches a live workflow.

Use stronger controls as consequence, sensitivity and autonomy increase. Government guidance also emphasises ongoing risk management throughout the AI lifecycle [6][7].

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- | | | |
|----|----------------------|--|
| 01 | Purpose | Does this serve a genuine operational or user need? |
| 02 | Data | What information enters the system, and is its use approved? |
| 03 | Quality | What does a good output look like, and how will it be tested? |
| 04 | Human control | Who reviews, overrides or stops the system? |
| 05 | Transparency | Do affected people need to know that AI is involved? |
| 06 | Failure | What happens when the system is wrong, unavailable or manipulated? |
| 07 | Monitoring | Who tracks outcomes, incidents, drift and changing risks? |
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For a small firm, governance should be visible and usable: an approved-tools list, clear data rules, a named owner, test cases, an incident route and a regular review.

Enquiry to proposal.

A 30-person advisory firm wants faster proposals without turning every bid into a custom project.

Partners rewrite similar material, pricing arrives late, and nobody can see why proposals stall.

The symptom is slow drafting. The constraint is fragmented knowledge, unclear approval rules and manual handovers.

Process	Software	AI
Standardise the offer Define reusable service modules, pricing rules, evidence requirements and approval thresholds.	Create one flow Connect CRM data, proposal templates, pricing and approval status in the existing stack.	Draft with context Use approved source material to create a first draft; a named lead reviews claims, scope and price.

Measure the change	Lead-to-proposal time
	Manual touches per proposal
	Conversion and gross-margin quality

Do not start with

A general chatbot with access to every client file, or a custom platform before the offer and approval rules are stable.

Order exception handling.

A 70-person distributor wants fewer delays when orders contain incomplete information, stock conflicts or special terms.

Customer-service staff chase data across email, ERP screens and spreadsheets.

The business treats every exception as unique, even though the same patterns repeat.

Process	Software	AI
Create exception classes Define the common causes, required data, service levels and who can resolve each class.	Surface one queue Bring ERP status, customer details and ownership into a visible workflow with alerts.	Classify incoming information Extract order details and suggest the exception class; a person approves commercial or stock decisions.

Measure the change	Exception cycle time
	Touches and re-keying per order
	On-time fulfilment and avoidable credits

Do not start with

An autonomous agent changing orders or promising dates without authoritative stock data and clear approval rights.

Job completion to invoice.

A 20-person service business wants to reduce the gap between finishing work and getting an accurate invoice out.

Engineers send inconsistent notes and photos; office staff reconstruct the job before billing.

The delay begins at capture, not in the accounting package.

Process Define completion evidence Agree the minimum data, photo, parts, sign-off and exception rules at the point of work.	Software Capture once Use a simple mobile form and connect approved job data to scheduling and accounts.	AI Structure messy notes Extract parts, work summary and follow-up actions for review before the invoice is created.
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Measure the change	Days from completion to invoice
	Jobs returned for missing information
	Billing corrections and debtor days

Do not start with

Replacing the finance system, or automating invoice creation before completion data is complete and approved.

A small improvement should produce a decision within 90 days.

The objective is not to finish transformation. It is to prove whether one improved workflow deserves wider investment.

Days 1-15

See the work

Observe the workflow, interview the people in it, establish the baseline and identify the constraint.

Days 16-30

Design the better flow

Remove steps, define rules and exceptions, assign ownership, and name the decision: stop, simplify, buy, automate, connect or build.

Days 31-60

Pilot in operation

Implement the smallest live intervention, train users and keep a visible exception route.

Days 61-90

Measure and decide

Compare the outcome with the baseline. Scale, revise, stop, or move to the next constraint.

This 90-day route covers implementation and pilot activity.

Prodro's **Start with one process** engagement is a separate two-week diagnostic. It ends with the current state, the better state and an action plan you can act on with or without us. Implementation is not included.

Take one workflow through the whole argument.

Complete this before discussing vendors, platforms or features.

01 Workflow

Name the start event and the completed outcome.

02 Outcome

What needs to be true when the workflow finishes?

03 Friction

Where does it wait, repeat, fail, depend on memory or require re-entry?

04 Baseline

Volume, time, cost, quality, risk or conversion today.

05 Root cause

Process, ownership, information, capability or technology?

06 The decision

Stop, Simplify, Buy, Automate, Connect or Build?

07 — Pilot decision

What will we test, who owns it, which metric should move, and on what date will we decide?

Fix the work that holds the business back.

Businesses accumulate processes, systems and administration nobody would design that way today. Prodro finds that work and fixes it.

Consultancy

Better operations, built around your business. We simplify how you operate, redesign processes and apply automation and AI where they make a meaningful difference — then stay through delivery and measure what changed.

Software

Shared problems, purpose-built products. Prodro creates, owns and operates software around operational problems worth solving at scale: Grantary, Swiftmore and Ownzo.

Start with one process.

One defined workflow 14 days, elapsed A fixed fee, agreed before we start

At the end of two weeks you hold three things: how the work happens today, how it should, and a plan to get there that you can act on with or without us. Implementation is a separate decision, and yours to make.

Current scope and fee: prodro.co.uk/start-with-one-process

hello@prodro.co.uk

Sources and further reading.

The guide uses current UK evidence to frame the adoption challenge. The method, principles, scenarios and recommendations are Prodro's interpretation.

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Scenarios. The three scenarios are hypothetical composites created to explain the method. They are not represented as Prodro client case studies and contain no claimed savings.

Scope. Published September 2026. Review legal, regulatory, data-protection and sector-specific requirements for each implementation.

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