SOFTWARE STUDIO · PORTO · SINCE 2018

Process First

Simplify and digitize an SME without breaking operations.
With AI when it makes sense. Only when it makes sense.

Sparksoft · Porto
No fuss, no overpromising.

WHAT YOU'LL GET

Five concrete things

No transformation promises. Just what you'll leave knowing how to do.

1. **A method with order.**
   Map, cut, automate. The order is what stops you paying to automate useless steps.

2. **A decision framework.**
   F × T × E: Frequency times Time times Error, to decide in 15 minutes what to automate first. With a filled-in sheet as an example.

3. **An AI checklist.**
   The 6 points a process must meet before AI comes in. Fail three and the project dies in the pilot.

4. **When to do it yourself and when to bring someone in.**
   Including the times when the honest answer is "you don't need to hire anyone".

5. **What the law already makes you think about.**
   GDPR and the AI Act, in the language of someone running a company, not a lawyer.

> No magic. Work from people who've seen this go well and go badly.

WHO IT'S FOR

Who it's for (and who it's not)

It's for you if:

- You run or founded an SME, somewhere between 5 and 50 people.
- Operations live in Excel, email and WhatsApp, and it works. But it costs more hours every month.
- You have no in-house technical team, and don't want to hire one for now.
- Someone's already tried to sell you "digital transformation" and you left the meeting unsure what you were buying.

Not for you if:

- You already have a mature ERP, an IT team and documented processes. You'll find this basic.
- You're looking for the miracle tool that fixes everything without changing anything. It doesn't exist, and this ebook won't pretend it does.

~15 min
reading time

1 a month
rhythm to apply it

THE PROBLEM

The problem isn't a lack of software

Most SMEs we meet don't lack tools. They have broken processes, with tools on top. A broken process shows in the symptoms:

> **The versions.**
> map_final_v3_FINAL.xlsx. If you have to ask which file is the right one, you've already lost data this month.

> **The person who knows.**
> There's someone who "knows where everything is". When they're on holiday, operations slow down. That's not a system, it's a dependency.

> **The weekly copy-paste.**
> From email to Excel, Excel to invoice, invoice to report. Integration done by humans, paid by the hour.

> **Information asked twice.**
> The client already gave the data in the form. Someone asks again by phone.

> **The "we've always done it this way".**
> Steps no one can justify, but no one removes.

If two or more sound familiar, keep reading.

The hours count

Broken processes don't show up in the accounts. They show up in the hours. Do this sum with your team:

people × hours/week on repeated manual work × 4 weeks × cost/hour

- 5 people
- 3 hours/week each, on copy-paste, manual checks and "where is this?"
- That's 15 hours/week. **60 hours a month.**
- At €12/hour company cost, that's **€720/month. €8,640/year.**

60
hours / month
in this example alone, before counting errors.

This is without counting errors, clients kept waiting, and the time management spends putting out fires. Your number will differ. What matters is that you do it **before** touching anything.

> This number is your baseline: it's what you'll measure everything against.

THE TRAPS

The two classic traps

Before the method, the two mistakes that ruin most projects.

Trap 1 Digitizing the chaos

Take the process as it is and put software on top. The exceptions, rework and useless steps stay. Now automated, with a monthly licence on top. **Software on top of a confusing process gives you a more expensive confusing process.**

Trap 2 Buying before defining

The demo was pretty. Six months later, the team uses a fraction of the features and the original problem is still there. **The right tool is chosen after you know the process, never before.**

> This ebook's method exists to avoid both. The order of the steps isn't decorative: it is the method.

THE METHOD

Map, cut, automate

Three steps, always in this order.

1

Map

Understand how the work happens today. Not as it's described, not as it should be: as it happens.

2

Cut

Remove the steps that exist out of habit. A shorter process before any software.

3

Automate

Only what's left. With the simplest tool that solves it — sometimes a €30/month SaaS, sometimes custom software.

Why this order? Because automating a useless step is paying to keep it alive. And because **a simple process with simple software always beats a confusing process with expensive software.**

THE METHOD · STEP 1

Map

You don't need consultants or diagrams with 40 boxes. You need an hour and a whiteboard.

How to do it:

1. Pick **one** process. Just one. The one that hurts most (page 11 helps you choose).
2. Gather the people who do the work. Not who's in charge: who does it.
3. Follow a real case end to end. From the client's request to it being resolved.
4. Write each step on a sticky note. And each **wait** too: "sits in the inbox until someone sees it" is a step, an expensive one.
5. Mark where information changes hands and where it changes system (email to Excel, Excel to invoice). That's where hours are lost and errors made.

10 minutes

The 10-minute test

At the end, explain the process to an outsider in 10 minutes. If you can't, the map isn't ready. Back to the whiteboard.

THE METHOD · STEP 2

Cut

With the map in front of you, cut before you automate. Usual candidates:

> **Approvals no one reads.**
> If in 6 months nothing was ever rejected, it's not an approval, it's a wait.

> **Fields no one uses.**
> Forms ask for 12 data points, the process uses 5.

> **Information asked twice.**
> If it already exists in a system, don't ask the client or colleague again.

> **Reports no one opens.**
> Ask whoever receives them. The answer usually hurts.

> **The "we've always done it this way".**
> Every step needs an owner and a reason. Without both, it goes.

At the end, write the process that's left on a **single page**. If it needs more than one page, it's still too complex: cut again. Many companies stop here for a month and already save hours.

Cutting is free.

THE METHOD · STEP 3

Automate

Only now does technology come in, and only into what survived the cut. The first decision is buy or build. Four questions:

1. **Is this process the same as everyone's?** Invoicing, accounting, email. If thousands of companies do it the same, buy. Someone's already solved it better and cheaper.
2. **Is this where you make money?** What sets you apart from competitors isn't for rent. If the process is your advantage, building gives you control over it.
3. **How many tools will you glue by hand?** If the answer to the SaaS is "yes, but then I export to Excel and import into the other one", the saving evaporates in copy-paste.
4. **Does the price scale with the team?** €20 per user seems little until you're 30 people over 3 years. Do the maths on the total, not the monthly.

THE RULE, IN SHORT

Common process, **SaaS**. Process that sets you apart, **custom**. In between, **SaaS plus custom integrations** to kill the copy-paste.

DECIDE · THE FRAMEWORK

F × T × E

You have 20 things to automate and budget for 2. This framework decides in 15 minutes, on one sheet. List every repetitive task, without filtering. Then score 1 to 5 on three criteria:

F **Frequency**
How often does it happen? Once a month is 1. Several times a day is 5.

T **Time**
How much does it take each time? A few minutes is 1. A whole afternoon is 5.

E **Error**
What happens when it goes wrong? No one notices is 1. Lost client or a fine is 5.

125
max score

Multiply the three. Sort. The top 2 or 3 are your plan. The rest waits, guilt-free. That's the difference between a plan and a wish list.

DECIDE · EXAMPLE

F × T × E, filled in

Example of a sheet at a distribution SME. Typical tasks, illustrative scores.

Task	F	T	E	Total
Enter email orders into the system	5	4	4	**80**
Reconcile payments with statements	4	4	4	**64**
Reply to quote requests	4	3	3	**36**
Weekly sales report	2	3	2	**12**
File supplier invoices	3	2	1	**6**

Reading: entering orders and reconciling payments are the plan. The weekly report, which seemed urgent because someone complained about it on Friday, waits. The filing, the easiest to automate, doesn't even make it.

> Without the framework, you automate what's easy or what made noise, not what costs money.

WHAT ABOUT AI?

What about AI? Three questions first

AI is a tool in the box, not the box. Before using it in a process, three questions:

1. **Are the rules clear?** "If the invoice is over €500, it needs approval" is classic automation. Cheaper, faster, no surprises. Don't spend AI on it.
2. **Does the data exist?** AI without organized data is an intern with access to nothing. First tidy the house, then hire the model.
3. **How much does an error cost?** AI gets things wrong. If an error costs a client or a fine, you need a person validating in the loop, from the design.

Where it's worth it

Free text, documents, triage, classification, summarizing, extracting data from emails and PDFs. Anything that used to need a person to read.

Where it's a waste

Calculations, fixed rules, reports. A well-built dashboard solves the same and never hallucinates.

AI CHECKLIST

Before you put AI in a process

Six points. Fail one and the project limps. Fail three and it dies in the pilot.

- [ ] **Accessible data.** Is the info in a system you can pull from? Exports, API, database. "It's in Ana's email" doesn't count.
- [ ] **Documented process.** One page explaining how it's done today. If no one can write that page, the problem isn't AI (back to page 8).
- [ ] **An owner with time.** One person on the team with 2–3 hours a week to test and give feedback in the first weeks. No owner, no project.
- [ ] **A metric.** Hours saved, errors avoided, response time. Pick one. Measure before you start.
- [ ] **A small case.** One process, not a department. The goal of the first project is to learn to work with this.
- [ ] **A plan for errors.** What happens when the AI gets it wrong? Who validates, who fixes, how it's detected. If the answer is "we'll see", you're not ready.

DIY OR DELEGATE

Do it yourself or bring in an expert?

Today, with ChatGPT and similar tools, you can do a lot alone. And for a lot of things, that's exactly what you should do. Don't hire anyone for what you can solve in an afternoon.

Do it yourself when

- The case is small and the error is cheap.
- The data isn't sensitive or client data.
- No one critical depends on the result.
- You want to understand how this works.

Bring in an expert when

- It touches client data or personal data.
- The error costs money, a client or reputation.
- It has to integrate with your systems.
- It has to run every day without supervision.
- It needs security, compliance or scale.

The hidden cost of "I'll do it"

The expensive part isn't building, it's maintaining. A prototype you built over a weekend that half the company came to depend on is a debt with no owner: the day it breaks, you stop.

> **The honest question is just one: how much is your time worth doing this, versus your time running the company?**

Sometimes the answer is "I'll do it and learn". Sometimes it's "I'll bring someone in". Both are right, at different times. And yes, sometimes the answer is **"you don't need to hire anyone"**. If that's your case, that's what we'll tell you.

AI AND THE LAW

The minimum you need to know

Honest disclaimer: this **is not legal advice**. It's the list of what you should have on your radar and confirm with someone who knows the subject before proceeding.

Personal data is still personal data.

If AI processes names, emails, contacts or client data, the GDPR still applies. Legal basis, minimization and people's rights are still there.

Where the data ends up.

In a cloud AI tool, what you put in leaves your company for the provider. Read the terms: can you turn off using your data for training? Where is it stored? Don't put in what you can't share.

The AI Act works by risk.

Most SME use cases (reading emails, extracting data, classifying, summarizing) fall under minimal or limited risk, with light transparency obligations. If you put a chatbot talking to clients, you must make clear it's an AI system, not a person.

Watch out for "high risk".

Using AI to decide hiring, credit or people's assessment enters another league, with heavy obligations. If your case touches decisions about people, stop and confirm before proceeding.

The dates apply in phases.

The AI Act is already in force and obligations enter gradually. Confirm the specific dates applicable to your case at the time you publish.

> Rule of thumb: the more sensitive the data and the more consequential the decision, the more you need to stop and confirm. To automate internal copy-paste, the risk is low. To decide about people, call in an expert — in tech and in law.

MINI-CASE

The distributor and the email orders

Composite example based on the pattern we see in real projects, with round numbers. Not a specific client.

BEFORE

A distributor with 12 people. Orders come by email, in free text and PDFs. Sofia spends 3 hours a day copying them into the invoicing system. Now and then she mixes up a reference, only caught at delivery.

AFTER

AI reads the emails, extracts the data, drafts the order in the system and flags doubtful cases. Sofia went from 3 hours entering to 45 minutes validating.

3h → 45min

€8,910/yr
estimated saving

What they did: mapped the process in an hour (14 steps, 5 cut). F × T × E scored "enter orders" 80 points — top of the list. It passed the page-14 checklist.

The maths: saves 2h15 a day. Over 22 working days, 49.5 hours/month. At €15/hour, €742.50/month. If a project like this costs €6,000 (illustrative), it pays for itself in about 8 months. And Sofia, who knows the clients like no one, moved to work that shows up in the invoicing.

The 5 mistakes to avoid

A summary of what we see go wrong, to stick on the wall.

1. **Digitizing the chaos.**
   Software on top of a confusing process gives a more expensive confusing process. Simplify first.

2. **Buying the tool before defining the problem.**
   The pretty demo doesn't replace the process map.

3. **Doing it all at once.**
   Swapping the whole system in one go is betting operations on a Friday night. Migrate in phases, process by process.

4. **Ignoring the people who do the work.**
   If the team discovers the tool on launch day, they'll work around it without meaning to. Whoever does the process helps design the process.

5. **Not measuring anything first.**
   Without the page-5 baseline, you'll never prove it improved.

Boring? Yes. Does it work? Also yes.

THE RHYTHM

One process a month

You don't need a transformation project. You need a rhythm. One process a month, in a 4-week cycle.

1. **Observe**
   Follow the process end to end. Each step and each wait.
2. **Cut**
   Habits, empty approvals, information asked twice.
3. **Standardize**
   Write how it's done. One page, max.
4. **Decide**
   Sometimes it's software. Often it's "good enough already". Both count.

THE 3 RULES OF THE CYCLE

- One process at a time.
- The people who do the work take part.
- Measure before and after. No exceptions.

> Twelve months of this and the company is different, without ever stopping for "the big project".

START HERE

Start this week

The startup plan, in order.

1. **Today**
   Pick a process. If in doubt, it's the one you thought about three times while reading.
2. **This week**
   Measure the baseline. How many hours it costs, to whom, with what errors (page 5).
3. **Next week**
   An hour, a whiteboard, the people who do the work. Map and the 10-minute test (page 8).
4. **Then**
   Cut and write the process on one page (page 9).
5. **Only then**
   Decide whether it needs a tool, which one, whether AI comes in and who does the work (pages 10 to 16).

If you take just one thing from this ebook, let it be this:

The order. Map, cut, automate.

Whoever swaps the order pays double.

TALK TO US · IF IT MAKES SENSE

Bring your process. We bring the questions.

If you got here with a concrete process in mind, you probably already know what to do next. If you want a second opinion, that's what we're for.

No pitch, no slides. In the end we tell you honestly what we think: whether it needs custom software, an existing SaaS, AI, or just a shorter process. There have been conversations like this where the answer was "you don't need us". Those count as a win too.

Book a 30-minute call

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We're a software studio in Porto. We build custom software, cloud and AI for companies that want a long-term technical partner, not a licence vendor.

No fuss, no overpromising.