

USA: +1 888-412-3104

AUS: +61-2-9386-0202

UK: +44-20-8123-1251

SA: +27-83-655-2408

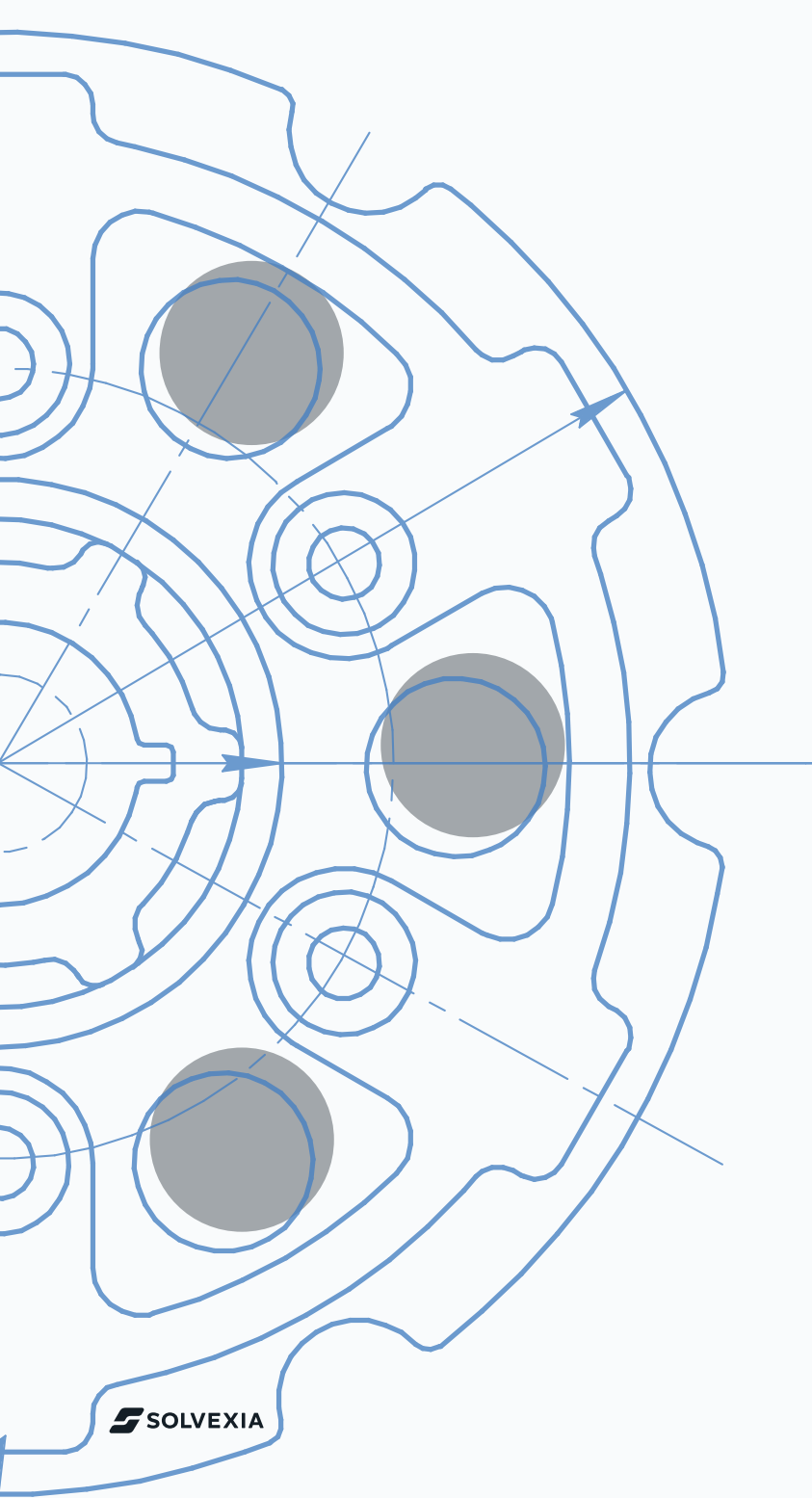
DEPLOYING SOLVEXIA AT SCALE

ebook / 2025 edition

 **SOLVEXIA**

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Solvexia has always endeavored to allow our customers to follow any path that suits their automation needs and goals. Whether they wish to address a single critical process or hundreds of processes across their company.

If your ambitions are to deliver automation at scale, however, our experience has shown that you will need three things:

1. A team that can automate processes and provide ongoing support and maintenance.
2. Tools to help your team automate.
3. A model for supporting the automated processes.

For the purposes of this document, "automation at scale" can be defined as using Solvexia to automate 50+ processes within your company.

Each of the points are described below in "FAQ" style, answering questions you are likely to have. This is based on what we have learned from [working with many companies](#) across several industries.

01

Your automation dream team

An internal team capable of doing the automation is critical if you want to deploy Solvexia at scale.

Given we provide a **cloud architecture** and the Solvexia license model is largely based on the number of users, not the number of processes, the main cost for automating processes lies in the cost of initially configuring these processes in the software.

This configuration typically takes anywhere from a few days for a small process to weeks or months for a large complex process. Having internal resources that can automate processes will significantly reduce the cost (and friction) of adding a growing number of processes to the system.

For the purposes of this document, we will refer to this team as your Automation Team.



What will this team do?

The team will be your primary resource for any automation projects using Solvexia. Their responsibilities will include:

- Helping different parts of the business identify the processes that are suitable for automation
- Analyzing the manual processes and designing automated solutions
- Building and supporting the processes in Solvexia
- Training end users

Who should the team report to?

This depends on who is driving the automation initiative. We find that automation with Solvexia [tends to be business led](#), so it makes sense for the automation team to report directly into the business.

However, technology will continue to be a vital partner as you may need to liaise with the IT department in relation to the supply of data. Therefore, it is critical that IT has some oversight and regular communication with the automation team.

What skills does this team need?

Considering the roles and responsibilities mentioned above, the team will need a mix of technical and business skills.

Technical skills include:

- An understanding of Microsoft Excel (intermediate to advanced level)
- Some experience with coding in VBA (macros) or any other language (e.g. Python, R, etc.)
- Some experience with databases such as Microsoft Access or SQL

Other important skills and experiences include:

- Collecting and documenting business requirements
- Project management capabilities
- Stakeholder management

Obviously, the team will need to be trained in the use of Solvexia. This is achieved through initial training by Solvexia or one of our partners, along with configuring the first processes under the supervision of these implementers or proficient internal users.

How many people will I need?

This depends on the ambition of your automation project. However, you can generally start with a single person and grow the team from there. In our experience, there are many capable people employed within large companies that have the mix of the skills and experiences described above. A good place to start would be to look for people with the following job titles:

- [Business analysts](#)
- [Systems accountants](#); or
- Actuaries (if you are in the financial services industry).

Team member #1 is going to be expected to play the role of the analyst, designer, project manager and relationship manager. Thus, they will need to be well rounded, exhibiting at least some capability across the board, rather than being a superstar in any one specific skill.

Use the first team member as your primary resource to get some runs on the board (i.e. to automate the first few processes with some assistance from the Solvexia implementation team). Use the wins from those initial processes to drive the business case for funding so you can automate more processes and grow the team. As the team grows, you can then look to specialize skills across individuals.

25:1

25 processes per 1 team member

In working with customers across different industries, we find a ratio of approximately 25:1 works well – i.e. automating about 25 processes for each team member.



Are we on our own (once set up)?

Not at all. Many of our clients still reach out and have us or our partners assist with projects. This tends to be for one of the following reasons:

- The business wants to automate a very complex process
- There is an urgent need to automate a process and the internal team is at full capacity with other automation projects
- The internal team would like a Solvexia expert to review a process they have automated

If and when required, Solvexia or one of our partners, can provide implementation services to assist. Solvexia also takes full responsibility for supporting the underlying software platform, and any issues can be sent directly to the Solvexia support team.

How can I maximize the success of the team?

Like with most teams, success will be influenced by the attitude and aptitude of the team as well as how the team is led and supported. Skilled and motivated team members, with the support of a senior champion can and do achieve great things with Solvexia.

The key is to build momentum – by automating the first handful of processes – and then use that momentum to get into an operating cycle of find, analyze, automate and then support.

The role of senior leaders should be to support and protect the team from distractions such resistance to change (from the subject matter experts), automation cynicism and typical project issues like scope creep.

02

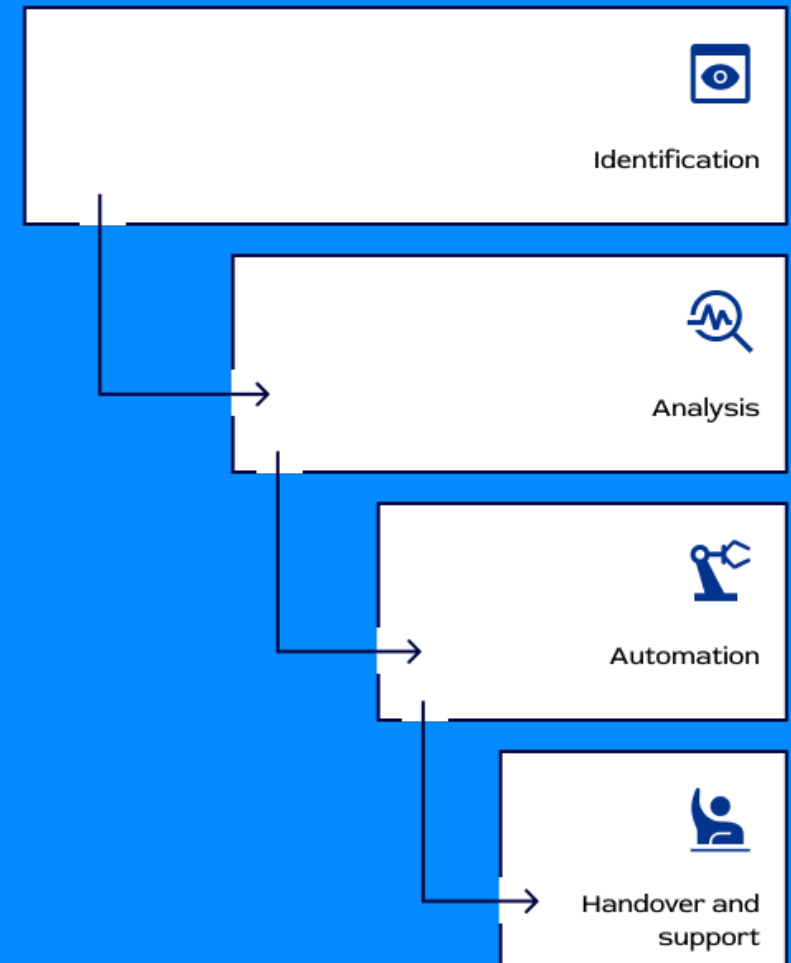
Tools of the trade

In addition to Solvexia itself, there are tools that can help ensure success for your team while delivering automation to the company. A good way to think about this is in relation to a **funnel of automation**.

Processes within your company start life at the **Identification** stage. If they are considered suitable for automation, they then flow into the **Analysis** stage (during which a go/no go decision is made for automation). Successful candidate processes are then implemented in the **Automation** stage and eventually move into the **Handover and Support** stage.

You need to have tools at each of the four stages to ensure the consistency and quality of work being done. Tools can come in various forms such as templates, procedure documents, checklists or even other pieces of software such as Atlassian's Confluence.

Funnel of automation



What tools do I need during the "Identification" stage?

Checklists for identifying processes suitable for automation (and ignoring the non-suitable ones).

As interest in automation grows, more and more people are likely to approach you with ideas for processes they would like to automate. It is critical that you select processes that are well suited to automation. More importantly, you need a way to quickly discard and ignore the processes that are not suitable – the goal at this stage is efficiency.

You need tools that allow your team to review, score and rank processes based on how suitable they are for automation. This should include some basic interview questions to determine things like what benefits are being sourced, the type of data that needs to be automated and the environment around the process (e.g. is it stable or likely to change etc.).

Start with this [list of criteria](#) to help identify if processes are suitable for automation. If you would like further information or help with this stage, please [let us know](#).



Get in touch to discuss your unique business processes and which ones are well suited to automation.

Get in touch

What tools do I need during the "Analysis" stage?

Template documents and education on how to analyze and collect requirements.

To maximize the likelihood of successful automation, you need to properly understand the process and the business that it services. Tools at this stage should focus on ensuring a thorough and meaningful analysis of each process prior to commencing any automation.

Every company and team will have its own methodologies on how requirements are gathered, analyzed and presented back to the business. However, we find that the most effective approach is one of "requirement elicitation"; a cycle of interviews with subject matter experts followed up with diagrams and, possibly, wireframes and mockups to continue the conversation and drill further into the process and requirements. We are happy to share our Solvexia implementation methodology if you are interested in learning more.

The tools you provide, when properly used, should ensure the analysis of each process:

- is thorough and detailed so as to allow the eventual automation of the process; and
- provides critical business insights that help explain why the process matters, to whom, and why it needs to be automated.



70%

Over 70% of project failures are attributed to a lack of requirements gathering



What tools do I need during the "Automation" phase?

Project management and QA checklists.

There is a tendency for people in this phase to just want to "get on with it" and automate. However, processes do not get automated without project management and the quality of the automation can't be guaranteed unless you have quality assurance. During this phase, focus on tools that help manage delivery and ensure consistency and quality in what is delivered.

Similar to analysis, each company and team manages projects differently. Most companies today use some form of "agile" methodology. Due to its flexibility, Solvexia lends itself well to an "agile" approach. Often, the automation team will deliver part of a process, get feedback and then make their changes, and so on.

As the team and number of processes grows, you will also need rules around how each process is implemented and checklists for the testing that should be performed prior to handover. Rules should cover things like naming conventions, organization within the tool (e.g. folder structure) and permissions. Checklists should be designed to help test for obvious issues (e.g., insufficient permissions being set for the end user etc.).

What tools do I need during the "Handover and Support" phase?

While this is covered in more detail in the section below, the focus should be on communication (between the automation team and end users), knowledge transfer, accountability and quality control (when making changes to a live process).

03

Handover and support

Your ability to automate new processes will excite people and get attention, but the quality and efficiency of your support is critical to your ongoing ability to scale. For context, this is the support provided by your automation team to the end users (the people who run the automated processes to get their work done).

Good support will lead to happy end users in the business. They will tell their colleagues, who in turn, will bring you more processes to automate. Therefore, providing good support after you have automated a process should be a priority.



It is also important to point out that the processes you automate will most likely change at some point in the future. This could be due to a regulatory change, an organizational restructure or the implementation of a new core system (to name a few examples). When this happens, you will need to be able to react and adapt the automated processes to meet these changes.

The flexibility and ability to incorporate changes quickly, are some of the key reasons that companies use Solvexia, rather than traditional IT development approaches.

It is therefore important to inculcate the need to provide good support and have the ability to respond quickly from day-one!

To provide good support you will need:

- Good communication practices between your end users and the automation team.
- A way to capture and share knowledge related to ongoing support and maintenance.
- Ways to ensure that the support being given is of high quality.
- Accountability within your automation team for supporting end users.

**Request a demo to see how
Solvexia can help you achieve
your business goals.**

Request demo

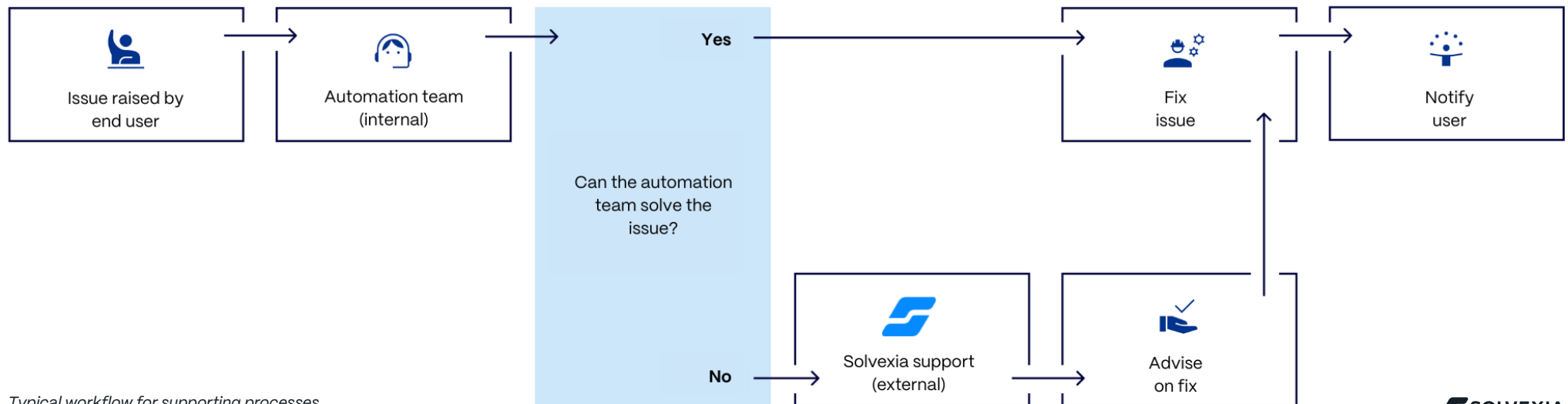
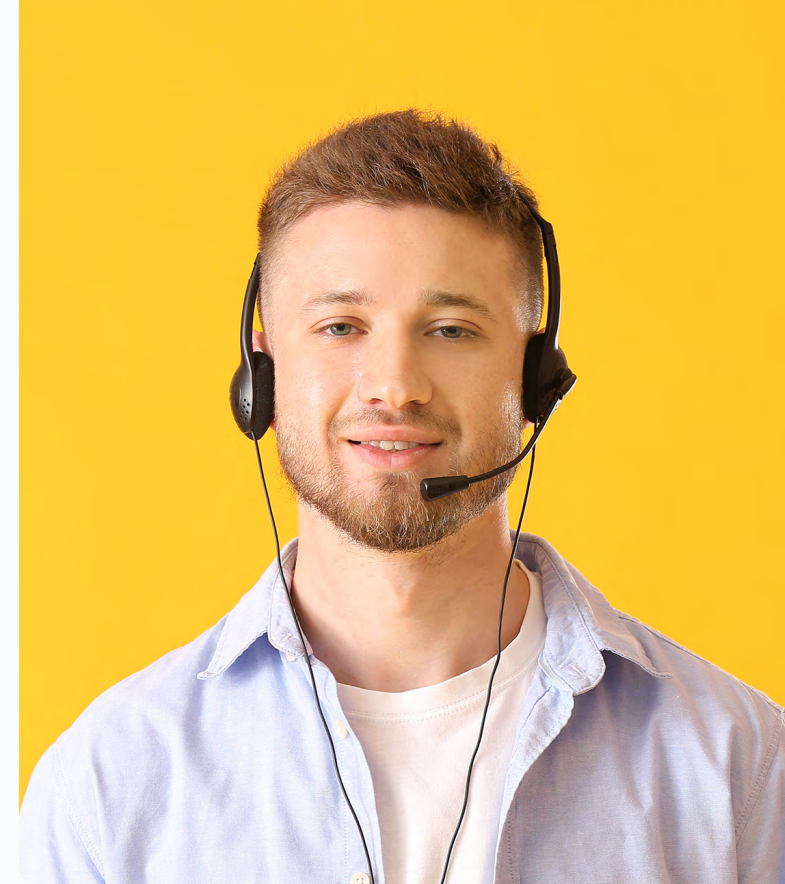
Hold on. Isn't that what Solvexia is supposed to provide?

Solvexia supports the underlying technology. This covers issues such as users having problems signing in, steps not running, or solving a system error, etc.

We typically do not support the processes built by our customers. Instead, think of the Solvexia tool being like Microsoft Excel from a support perspective, where Microsoft supports the application but not the individual spreadsheets that people have created.

We sometimes provide "solution level" support on a retainer basis. However, if you intend to achieve scale by creating a team that automates processes for the company, then we recommend that they also support the processes they develop for two reasons:

- It builds a bond between the end users and automation team.
- Supporting processes and fixing issues ultimately makes people better at automating processes in the future (by learning from their or others' mistakes).



Typical workflow for supporting processes

How can we facilitate good communication?

The communication between your automation team and end users should start as early as possible – ideally during the analysis phase. At the very least, this will build rapport and trust between the two groups.

It is also important to educate end users when handing over the automated process. Be super clear on who they need to contact for support and provide different channels through which they can reach support such as a phone number, shared email inbox etc. If your company already has a support ticketing system, investigate if you can leverage this to provide support to the end users.

How do you measure the quality of the support being given?

The easiest way to do this is to talk to the business and ask for their feedback. If the volume of support is high, you can try sending out a periodic survey asking the business (end users) to rate the quality of support out of 10.

We also recommend proceduralising the support as much as possible. This includes checklists to help ensure that the team has not missed anything while providing support (e.g. before telling the end user that the issue is resolved, have you run the process and confirmed that the results are correct?).

How can we capture and share knowledge related to support?

Document and record all of the issues raised by the end users as well as the actions taken to resolve each issue. The information you capture will play a critical role in improving the quality of processes automated in the future and will also reduce the time to resolve similar issues in the future.

The easiest way to do this is to record each issue in a spreadsheet (for example, search for “Excel issue tracker” in Google to find free templates). Also, consider creating an internal knowledge base with self-help articles to assist users with common or recurring issues (example: see help.solvexia.com).

What are some ways to enforce accountability?

This is solved in part by the quality of people you place in the automation team. However, some performance metrics and reporting can also be a big plus.

Many of our customers will have a “virtual SLA” in place between the business and automation team covering key performance metrics such as response and resolution times. Accountability should be a natural outcome of tracking each issue and reporting on the performance of each team member against those SLAs.

CONCLUSION

This document shares some of the practical aspects of deploying Solvexia at scale throughout your company. To summarize, this includes:

1. Building a team capable of doing and supporting the automation.
2. Arming your team with tools to help them identify, analyze, automate and support processes throughout the company.
3. Ensuring you are able to support the processes once automated.

There are, of course, many business aspects to consider in the context of scale. Building a team, equipping them with tools and supporting the business will cost money, meaning funding discussions, business cases etc. We can help with this and have a growing set of materials to facilitate this, including our [guide to building a business case](#).



Solvexia is a low-code platform that automates spreadsheet-driven data preparation and manual processes.

It enables finance to free up their time by running processes 100x faster with 98% fewer errors, allowing businesses to reallocate essential resources to value-added work.

Finance and accounting teams choose Solvexia to unify data from systems and spreadsheets and automate their processes without involvement from IT. Its drag-and-drop interface makes it fast to deploy and easy to learn.

Solvexia combines and manipulates data, performs calculations and creates interactive reports, analytics and smart dashboards for richer insights for your stakeholders.

You can leverage Solvexia to automate hundreds of processes for your company, including reconciliations, revenue and expense reporting, regulatory compliance, rebate management and much more.

100x
faster
processes

**Positive ROI
within 6–12
months**

Modern cloud architecture

Works with existing systems and
spreadsheets

Deploy
processes in
minutes, not
months

98%
fewer errors



Ready to deploy Solvexia at scale?

Book a demo to see what Solvexia can do for you.

[Book a demo today](#)