



BUSINESS TRANSFORMATION · WORKFLOW AUTOMATION ·
PRACTICAL AI

Fix the process first. Then automate it. Then let AI accelerate it.

Workbie turns disconnected, manual ways of working into one clear, connected business system, configured around how your organisation actually operates.

[Book your free workflow audit →](#)

[See Workbie built around your business](#)

Workbie, because it's easier.



Illustrative interface

Your business shouldn't be held together by spreadsheets, inboxes and workarounds.

01

Too many disconnected systems

Different departments, different tools, information gaps and duplicated effort.

02

Repeated data entry

The same customer, job or financial details copied between systems.

03

Work hidden in inboxes

Requests and approvals depend on someone seeing and forwarding an email.

04

Spreadsheet dependency

Tracking and reporting rely on files that are hard to control and audit.

05

Constant chasing

Managers ask what's done, what's late and who owns the next action.

06

Slow customer updates

Customers call for progress because they can't see what they need.

07

Manual reporting

Leaders wait for data to be gathered before they can decide.

08

Software that only half fits

The rest of the process lives in spreadsheets and bolt-ons.

Workbie replaces fragmented activity with **connected workflows, clear ownership, real-time visibility** and automation built around how you need to run.

Everyday problems. Practical fixes.

Start with the work that costs your team time every day.

COMMON PROBLEM

THE WORKBIE FIX

WHAT CHANGES

01 Spreadsheet dependency

Multiple versions, fragile formulas and repeated entry make everyday work hard to control.

Turn critical workbooks into linked records, structured fields and named ownership. Capture information where the work happens.

One place to find information. Enter it once and reuse it. See updates as they happen.

02 Repetitive manual admin

Details are copied from emails to jobs, spreadsheets and invoices. Staff chase the next update.

Map the process, remove unnecessary steps, then automate reminders, status changes, documents and follow-ups. Keep approval with people.

Less re-keying and chasing. Clearer ownership and more time for productive work.

03 Limited visibility

Updates sit across inboxes, spreadsheets and accounts software. Reports arrive after decisions are needed.

Connect the records that matter and configure dashboards around your priorities, showing live work, owners and bottlenecks.

A shared operational picture. Spot problems earlier and spend less time gathering the facts.

Process benefits, not measured customer results. Configuration and integrations are agreed for your business.

Which of these is slowing your business down? Book a free workflow audit →

Keep work connected. Build better foundations.

Fix the gaps between teams, systems and information before adding more tools.

COMMON PROBLEM

THE WORKBIE FIX

WHAT CHANGES

04 Dropped handovers

Sales, office and delivery teams pass work between them, but details, decisions and ownership get lost.

Give every stage an owner and status. Keep emails, notes, photos and documents with the job, plus scoped customer access where useful.

Less re-explaining. Clear accountability and a record of what was agreed and when.

05 Disconnected systems

Accounts, jobs and rotas sit in separate tools. Teams duplicate customer records and reconcile information.

Decide what stays, connects or retires. Agree data flows between retained tools; use structured imports or agreed steps where links are unavailable.

Less re-keying where tools connect. Finance, operations and customer information brought together.

06 Not ready for AI

Scattered, inconsistent records make answers unreliable and leave AI pilots disconnected from useful work.

Establish reliable records and access rules. Use AI for useful questions, summaries and drafts, with people approving important output.

A stronger information foundation. Faster routine drafting without giving up human control.

Process benefits, not measured customer results. Configuration and integrations are agreed for your business.

Which of these is slowing your business down? Book a free workflow audit →

Built around your business. Not the other way around.

Off-the-shelf software asks your team to change to fit the product. We study how you operate, redesign the process, then configure the platform around the better way of working.

Typical software

- ✗ Buy a fixed product
- ✗ Bend your processes to fit it
- ✗ Patch gaps with spreadsheets
- ✗ Buy more tools to fill holes
- ✗ Re-enter data between systems
- ✗ Replace it when you outgrow it

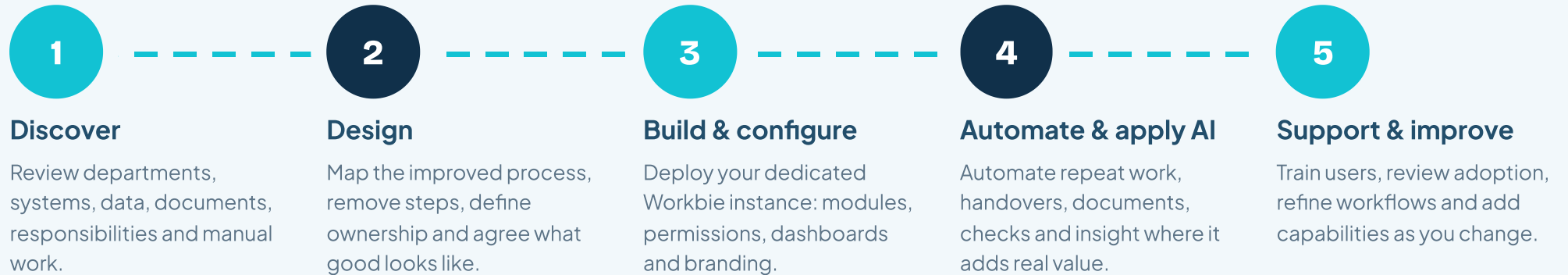
VS

The Workbie approach

- ✓ Understand the real process
- ✓ Find waste, delays and risks
- ✓ Design the ideal workflow
- ✓ Configure only the modules you need
- ✓ Connect your existing systems
- ✓ Add automation and AI, people in control
- ✓ Keep adapting as you grow

The value isn't simply the software. It's the transformation of how your business operates.

From operational audit to a system your team will actually use.



Your own dedicated instance. Not a shared multi-tenant app: every customer gets Workbie on its own server, with the modules, workflows, permissions, branding and integrations chosen for them.

Less disruption · Better adoption · Faster improvement · A platform that grows with you

One platform for the work that keeps your business moving.

Pick the capabilities you need, not a bloated system full of features you'll never use.

CRM, customers & sales

- Leads, customers & contacts
- Pipelines & Kanban views
- Opportunities & forecasts
- Calls, emails & activity history
- Follow-ups & next actions
- Quotes, proposals & approvals
- Customer onboarding

Projects, jobs & delivery

- Projects, phases & sprints
- Boards, lists & timelines
- Job planning & scheduling
- Milestones & dependencies
- Time recording & work logs
- Issue & risk tracking
- Completion & handover

Tasks & workflow

- Personal, team & dept tasks
- Owners, priorities & due dates
- Recurring tasks & checklists
- Automated task creation
- Approvals & escalations
- Reminders & next-action views
- Full audit history

Connect the people, resources and records behind every job.

Suppliers & purchasing

- Supplier directory & status
- Pricing records
- Purchase requests & approvals
- POs & delivery tracking
- Contracts & expiry dates
- Performance & compliance

Workforce & HR

- Staff & contractor records
- Holidays & absence
- Shifts, rotas & availability
- Timesheets & expenses
- Training & qualification reminders
- On/offboarding workflows

Stock, vehicles & assets

- Stock records & movements
- Equipment registers
- Vehicle compliance dates
- Allocation to staff, sites, jobs
- Maintenance & inspections
- Photos & condition records

Sites & locations

- Customer & project sites
- Site contacts & instructions
- Location-specific checks
- Job history by site
- Multi-location dashboards

Keep commercial and customer activity connected to the work.

Quotes & finance

- Quotes & estimates
- Approval & acceptance
- Quote → job conversion
- Invoicing linked to work done
- Recurring billing
- Profitability visibility
- Accounting integration

Documents & forms

- Central, linked records
- Version control & access
- Templates & generation
- Digital forms
- Sign-off workflows
- Renewal reminders
- Searchable audit trails

Customer service

- Enquiries & tickets
- Ownership, priority, status
- Linked service history
- Escalations & SLAs
- Standard responses
- Recurring issue reports

Customer portal

- Secure access to permitted info
- Live job & project progress
- Quotes, invoices & contracts
- Documents, messages & approvals
- Fewer chasing calls and emails
- A more professional experience

Bring conversations and systems into the workflow.

Workbie doesn't have to replace every app. It can be the operational layer that connects information, triggers the next action and gives you one clear view.

- Email linked to the right customer or job
- Outlook & Microsoft 365 connectivity
- SMS sending & receiving
- Templates & automated notifications
- Internal notes, comments & handovers
- Shared calendars & scheduling

Example: a customer accepts a quote → opportunity progresses → job created → onboarding tasks generated → operations notified → missing info requested → record ready to invoice. **No manual handovers.**



*Where a suitable API or integration method is available.

Remove repetitive work and turn data into action.

Workflow automation

- Trigger actions on status change
- Auto tasks, reminders & alerts
- Route approvals to the right person
- Escalate overdue items
- Generate documents
- Block progress until info is complete

Practical AI

- Summarise records & conversations
- Draft emails, updates & documents
- Extract useful information
- Suggest next actions
- Cleanse & categorise data
- Answer questions on your data
- People stay in control

Dashboards & reporting

- Role-based dashboards
- Pipeline & forecasting
- Job & project status
- Workload & bottlenecks
- Service trends
- Profitability indicators
- Live, not spreadsheet-built

AI shouldn't sit on top of a broken process. Workbie fixes the foundations, connects the data, then applies AI where it genuinely improves the outcome.

WHAT CHANGES

Less chasing. Fewer errors. More time to move the business forward.

01

Less admin

Enter a customer once; sales, ops and finance all see it.

02

Clear accountability

Every task has an owner, status and due date.

03

Faster responses

Comms, status and documents in one record.

04

Better control

See what's delayed, blocked or awaiting approval.

05

Fewer mistakes

Workflows stop until mandatory steps are done.

06

Live management info

Directors see real numbers, not monthly spreadsheets.

07

Traceability

Permissions, history and approval logs built in.

08

Happier customers

Portal updates replace chasing calls.

09

Less complexity

Replace or connect a sprawl of small tools.

10

Evolves with you

Add departments, forms and workflows any time.

One flexible platform, shaped for your industry.

Construction & trades

Enquiries, estimates, sites, labour, subcontractors, variations, invoicing.

Manufacturing & engineering

Orders, production stages, shop floor, stock, quality, delivery.

Education & training

Referrals, learners, courses, timetables, consent, compliance.

Care & support

Referrals, placements, services, compliance and secure reporting.

Events & hospitality

Enquiries, availability, bookings, performers, schedules, billing.

Logistics & fleet

Jobs, vehicles, drivers, schedules, incidents, compliance.

Professional & legal

Clients, matters, approvals, deadlines, billing.

Warehousing & wholesale

Sites, stock, orders, suppliers, renewals, service.

A proven core with customer-specific configuration, so the system speaks **your language, your records and your workflows.**



See what Workbie could fix in **your** business.

You don't need another disconnected app. You need a clearer way of working. We'll find where time, information and opportunities are being lost, and show you the fix.

FREE · NO OBLIGATION

Book a free workflow audit

We map one process end to end and show you what could be removed, connected and automated.

TAILORED

Request a Workbie demonstration

See the platform configured around your terminology, records and workflows.

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Workbie, because it's easier.