

MEASURE · IMPROVE · REALIZE

Hawkins & Hayes

SYSTEM ALIGNMENT & AUTOMATION

CASE STUDY

CLIENT BACKGROUND

The client operated five regional distribution centers supplying customized packaging materials to retail and e-commerce clients. Despite strong revenue growth, the company's information ecosystem had become fractured — ERP modules, legacy CRMs, and disconnected spreadsheets operated in silos. Staff spent more time reconciling data than managing customers. Leadership recognized that digital misalignment had become the biggest obstacle to scalability and profitability. Hawkins & Hayes was tasked with creating cohesion, automation, and visibility across the organization.

OUTCOMES AND DELIVERABLES

The engagement delivered tangible operational and strategic benefits:

- **35% reduction in transactional hours**, freeing staff for higher-value work.
- **Order accuracy improvement to 99.2%**, reducing client churn.
- **Unified ERP ecosystem** integrating logistics, finance, and sales.
- **Live data dashboards** providing executive-level transparency across all locations.

EXECUTIVE SUMMARY

An $80 million packaging and distribution company operating across three states was constrained not by market demand, but by systemic inefficiency. Growth had outpaced its technology architecture, leaving teams trapped in spreadsheets and manual reconciliations. Hawkins & Hayes was engaged to realign systems, streamline data flow, and automate core workflows. Over 12 weeks, we eliminated redundant tools, integrated key platforms, and introduced automation that reduced transactional workload by 35% while improving order accuracy to 99.2%.

THE CHALLENGE

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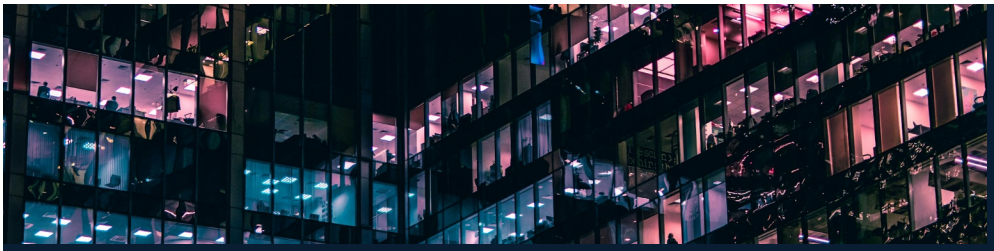
Operational data existed in multiple versions across systems, creating errors, rework, and inefficiency.

- 37 spreadsheets duplicated functionality already supported by existing systems.
- Departments maintained separate reporting methods with no unified metrics.
- Manual data re-entry between sales, logistics, and finance increased cycle times and risk of error.

The challenge was not technology shortage — it was *technology sprawl*. Hawkins & Hayes aimed to unify and automate without disrupting daily operations.

HAWKINS AND HAYES APPROACH

Our methodology focused on connecting people, process, and platform through system design and automation.



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WHY SYSTEMS & AUTOMATION MATTER

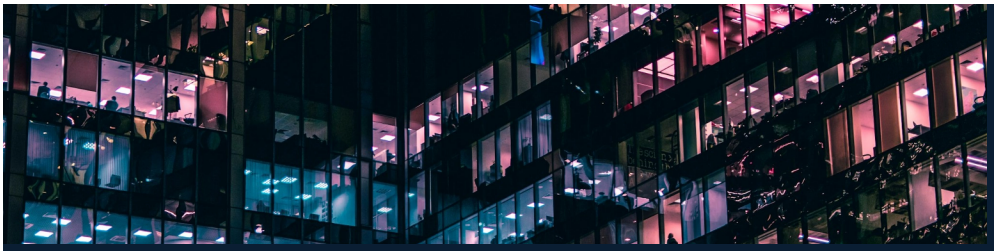
Technology only creates value when it speaks a common language. Hawkins & Hayes helps business owners translate fragmented systems into a unified architecture that drives efficiency, accountability, and insight. By aligning digital infrastructure with strategic intent, companies gain scalability, accuracy, and control — the essential pillars of sustainable growth.

CLIENT REFLECTION

"We didn't just install automation — we finally got our systems to talk to each other. Hawkins & Hayes turned data chaos into cohesion. It felt like we went from fog to flight control. The visibility we have now doesn't just make work easier — it changes how we think about growth. We can see the entire business in real time, make faster decisions, and trust the data behind them. What started as a systems project became a turning point in how our company operates, communicates, and plans for the future."

HAWKINS AND HAYES APPROACH CONTINUED

- **1. System Audit & Mapping**
- Conducted a full audit of ERP, CRM, and finance tools to identify overlap and integration gaps.
- Mapped 37 recurring spreadsheets and "shadow processes" operating outside official workflows.
- Interviewed department heads to surface data friction points and workarounds.
- **2. Architecture Alignment**
- Designed an integrated systems map establishing one continuous data flow from *quote → order → dispatch → invoice*.
- Recommended consolidation to a single ERP instance with embedded CRM and automated purchasing.
- Developed APIs to enable real-time data exchange between logistics, operations, and finance.
- **3. Automation Implementation**
- Deployed robotic process automation (RPA) for repetitive data entry and invoice reconciliation.
- Implemented rule-based workflows to auto-approve low-value purchases.
- Built executive dashboards tracking throughput, margin by site, and customer satisfaction in real time.



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STRATEGIC IMPLICATIONS

Alignment and automation reshape not only operations but leadership itself. When data becomes connected and visible in real time, management shifts from reacting to anticipating. Decisions are faster, collaboration tighter, and accountability shared across the business.

For growing firms, these systems create the backbone for scale — standardizing processes, ensuring consistent customer experience, and providing the visibility investors and boards expect. Automation enhances control, accuracy, and governance, reducing operational noise and freeing leadership to focus on strategic growth.

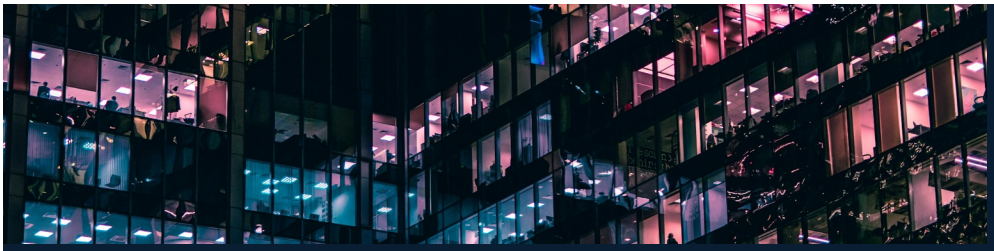
The outcome is more than efficiency — it's transformation. Aligned systems turn data into intelligence and automation into agility, giving organizations the structure and confidence to grow with precision and purpose.

KEY FINDINGS

Insight	Description	Outcome
Manual Reconciliation Overload	~1,200 staff hours lost per month lost to duplicate data handling	35% transactional workload reduction post-automation.
Data Re-Entry Errors	22% of sales orders required re-keying due to system misalignment.	Order accuracy improved from 93% to 99.2%
Lack of Unified Reporting	17 different Excel reports replaced with live dashboards.	Full real-time visibility across five facilities.

LEARNINGS & NEXT STEPS

System alignment isn't an IT project — it's an organizational redesign. By connecting process flow to data integrity, the client achieved both efficiency and insight. The next phase ("Improve → Capability & Accountability") will focus on embedding data governance and role clarity to ensure automation supports—not replaces—effective leadership.



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TIMELINE & WORKING WITH HAWKINS & HAYES

WEEK

1-2 · Week 1–2 · Orientation & Alignment
We begin with clarity — defining objectives, stakeholders, and value metrics. A kick-off workshop establishes scope, data access, and cadence of communication.

3-6 · Week 3–6 · Discovery & Diagnostics
Our team maps current-state performance through data analysis, stakeholder interviews, and benchmark comparisons. Early findings highlight where value is created, lost, or hidden.

11-14 · Week 7–10 · Design & Recommendation
Insights become solutions. We develop targeted initiatives — operational, financial, and leadership — prioritized by impact and feasibility.

7-10 · Week 11–14 · Implementation & Enablement
Change is embedded, not imposed. We standardize workflows, train teams, and integrate dashboards for visibility and accountability.

15+ · Week 15+ · Realization & Ongoing Support
Once improvement is sustained, we help clients track enterprise value, communicate results to stakeholders, and prepare for strategic options such as growth, transition, or exit.

START THE CONVERSATION

Start the conversation to discover how Hawkins & Hayes helps business owners quantify, protect, and grow enterprise value — from baseline clarity to strategic realization.

Hawkins & Hayes

Transforming operational progress into measurable enterprise value.

A STRUCTURED PATH FROM INSIGHT TO ENTERPRISE VALUE

When clients engage Hawkins & Hayes, they experience a disciplined, transparent process built to convert performance improvement into measurable enterprise value. Every engagement follows a clear execution rhythm and a proven methodology — ensuring focus, alignment, and accountability from day one.

THE HAWKINS & HAYES METHODOLOGY

Measure → Improve → Realize

A continuous cycle designed to identify opportunity, build capability, and convert progress into long-term enterprise value.

Phase	Focus	Modules
MEASURE	Establish truth before change	Operational Baseline Data & Diagnostic Analysis Opportunity Identification
IMPROVE	Embed systems, structure, and scale	Process Optimization System Alignment & Automation Capability & Accountability
REALIZE	Convert progress into enterprise value	Sustain & Scale Value Tracking & Reporting Strategic Realization

OUR PRMOISE

Clarity — Independent insight revealing where and how value is created.

Discipline — Systems and structure that sustain performance beyond engagement.

Results — Tangible financial and organizational impact that enhances valuation readiness.