Sample Technology Consulting Report

Independent guidance on systems, integrations, and ROI for modern business transformation.

By Merto Software Solutions





Introduction and Sample Disclaimer

About This Document

This sample report shows the type of outputs provided in a Merto consulting engagement. Content has been anonymised and simplified for demonstration purposes.



Important Notice

Not client-specific content, indicative examples only for demonstration of our consulting methodology and deliverable quality.



Next Steps

Book your free consultation to receive a comprehensive, tailored report specific to your business needs and technology landscape.



Contact Information

helloemertosolutions.com | mertosolutions.com for inquiries about tailored consulting engagements and technology assessments.

Scenario Overview

Current System Architecture

A mid-sized service company operates with disconnected systems requiring manual data export and re-entry processes weekly. This creates operational bottlenecks and data inconsistencies that impact business decision-making and customer service delivery.



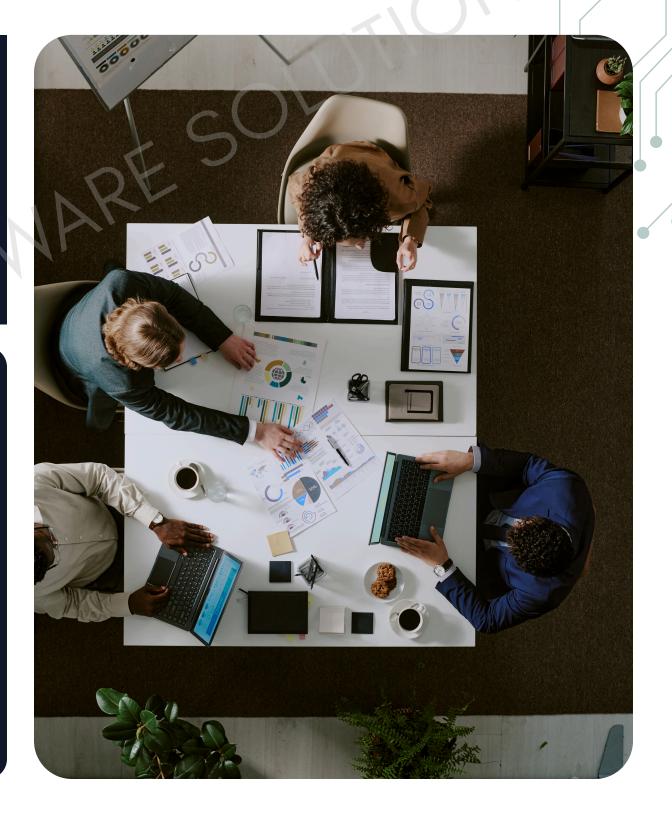
CRM System

The customer relationship management platform is isolated from internal systems, requiring manual data exports for reporting and analysis workflows.



Spreadsheet Bridge

Manual data transfor through Excel Spreadsheets create version control issues and introduce human error into critical business processes.



Business Impact Analysis

Current System Problems

Your disconnected systems create real business challenges that affect daily operations, data accuracy, and team productivity. These issues compound over time, leading to increased costs and missed opportunities.



Time Waste

Manual data exports and reentry consume over 40 hours each month, time that could be spent on strategic work driving growth.



Data Delays

Weekly manual syncs mean decisions are made with outdated information, affecting your ability to respond quickly to market changes.



Error Risk

Manual processes introduce human errors that can result in incorrect reports, billing errors, and suboptimal customer experiences.



Team Frustration

Staff frustration with repetitive manual tasks leads to decreased job satisfaction and higher turnover rates.

THE SOLUTION

Real-time API integration eliminates manual work, provides instant data access, reduces errors, and frees your team to focus on high-value activities that grow your business.

Executive Summary

85%Current Risks

60% Automation Opportunities

12
Priority Actions

250% Estimated ROI

Current Risks

Manual data processes create operational inefficiencies and compliance vulnerabilities requiring immediate attention.

- System integration gaps are causing data silos
- Manual processes increase error rates.
- Security vulnerabilities in legacy systems

Automation Opportunities

Significant potential for process automation to drive efficiency gains and cost savings across operations.

- AP integration for real-time data sync
- Automated reporting and analytics
- Workflow optimisation opportunitios

Priority Actions

Strategic implementation roadmap focusing on high-impact, quick-win solutions. with measurable outcomes.

- Immediate risk mitigation measures.
- Coro system integration planning
- ROI-driven implementation phases

Integration & Automation Map









Weekly data exports, spreadsheet manipulation and manual re-entry are consuming 40+ hours monthly with high error rates and delays.



Transformation Phase

API development and system integration planning with parallel testing to ensure seamless transition without business disruption.



Future Automated Process

Real-time data synchronisation with automated workflows, instant reporting, and manual intervention required.

Cost & ROI Model

Cost Category	Current Annual Cost	Proposed Annual Cost	Annual Savings	3-Year Projection
Manual Admin	£25,000	£10,000	£15,000	£111,000
System Maintenance	£18,000	£12,000	£6,000	£111,000
Reporting Delays	£9,000	£5,000	£4,000	£111,000
Error Correction	£5,000	£2,000	£7,500	

Indicative Payback Period

6–12

Months

Total Annual Savings £15,000

90-Day Delivery Plan

Our recommended delivery approach is structured into three clear phases to ensure measurable progress, rapid value delivery, and minimal disruption to ongoing operations. Each phase builds on the previous one, ensuring improvements are implemented safely and effectively.



Phase 1: Quick Wins & Risk Mitigation (Weeks 1-4)

Immediate system security updates, data backup implementation, and initial API development setup with stakeholder alignment and project kick-off.



Phase 2: Core System Improvements (Weeks 5-8)

API integration development, database optimisation, automated reporting setup, and comprehensive testing with user training preparation.



Phase 3: Optimisation & Monitoring (Weeks 9-12)

Performance monitoring implementation, user training completion, system optimisation, and transition to full production with ongoing support setup.

Risk Register

Proactive risk management strategy with identified mitigation approaches and assigned ownership for accountability throughout implementation.

Risk Description	Severity	Likelihood	Mitigation Strategy	Owner
Data duplication during migration	High	Medium	Implement validation scripts and parallel testing	Technical Lead
System downtime during integration	Medium	Low	Schedule during off-hours with rollback plan	Project Manager
User adoption resistance	Medium	Medium	Comprehensive training and change management	HR Director
API performace issues	Low	Low	Load testing and optimisation protocols	DevOps Team
Data security vulnerabilities	High	Low	Enhanced encryption and access controls	Security Officer

Playback Session & NEXT STEPS

Live Walkthrough Session

Interactive presentation of findings with key stakeholders, including system demonstrations and Q&A sessions to ensure complete understanding.

- Executive summary presentation with key findings
- Technical deep-dive for IT teams and developers
- Business impact discussion with department heads

Deliverables Package

Comprehensive documentation, including technical specifications, implementation guides, training materials, and Ongoing support protocols.

- Detailed technical architecture documentation
- User training materials and video tutorials
- Implementation timeline with milestone tracking

Action Plan & Timeline

Clear roadmap with assigned responsibilities, deadlines, and success metrics to ensure smooth implementation and accountability.

- Weekly progress reviews with the steering committee
- Monthly milostono assessments and budget tracking
- Quarterly business impact measurement and reporting

TECHNOLOGY STACK & SECURITY REVIEW

Understanding Your Current Stack

The current technology stack has been reviewed to evaluate how effectively existing systems, tools, and workflows support day-to-day operations and long-term growth.

Our analysis identified several opportunities to improve system integration, enhance security controls, and strengthen overall performance and scalability.

The following areas outline key findings and recommended focus points to ensure the technology foundation remains reliable, compliant, and future-ready.

Outcome:

A strengthened technology foundation with improved integration, enhanced data security, and a clear roadmap for scalable growth.

These improvements will reduce operational risk and position the organisation for sustained performance and future digital initiatives.

Key Assessment Areas

1. Core Systems & Integrations

Current integrations between core platforms such as the CRM and internal databases are limited, leading to duplicated data and manual dependencies.

2. Infrastructure & Cloud Readiness

The existing infrastructure is functional but would benefit from improved scalability and cost efficiency. Migration to a modern cloud environment would provide greater flexibility, enhanced security, and simplified maintenance.

3. Security & Compliance

User access policies and data handling procedures meet basic standards but lack centralised control.

Implementing stronger governance, audit trails, and encryption standards will improve compliance with GDPR and ISO 27001 principles.

4. Performance & Scalability

Several systems show performance degradation during peak load times. Refactoring data flows and optimising database queries would significantly improve responsiveness and prepare the platform for growth.

5. Business Continuity

Backup and recovery processes are in place but not fully automated. Introducing automated failover and recovery testing would increase resilience and minimise potential downtime.

How We Can Help Implement Your Plan

Your Implementation Partner

Merto Software Solutions works as an extension of your team, providing end-to-end implementation support from planning through ongoing optimisation and maintenance.



Integrations & APIs

Connect your CRM, databases, and third-party platforms into a seamless workflow. We specialise in secure, API-driven architecture that removes data silos and eliminates repetitive tasks.



Custom Software Development

Connect your CRM,
databases, and third-party
platforms into a seamless
workflow. We specialise in
secure, API-driven
architecture that removes
data silos and eliminates
repetitive tasks



AI & Automation

Leverage intelligent
automation to reduce
admin time, improve
accuracy, and unlock
insights from your data.
Whether it's process
automation or Al-assisted
decision-making, we help
you scale smarter.



Cloud & Scalability

Modernise your infrastructure for flexibility and performance. We handle cloud migration, system optimisation, and continuous improvement for long-term stability.



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Book a free consultation and receive a tailored technology review for your business. Let's unlock your potential for growth and efficiency.

Book Your Free Consultation

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