

MEMORYLANE

Workflow Analysis Report

Finance Operations Case Study

September 2025

Executive Summary

Coastal Brands · Finance Operations Team

We mapped out how your finance team works over a two-week period. We identified **18 repeating workflows** that consume significant time each day. Three stand out as high-impact opportunities — addressing these could free up **850 hours annually**, worth approximately **\$72,000 in staff time**.

18

workflows found

850h

saved annually

\$72k

annual savings

12x

return on investment

TOP 3 OPPORTUNITIES

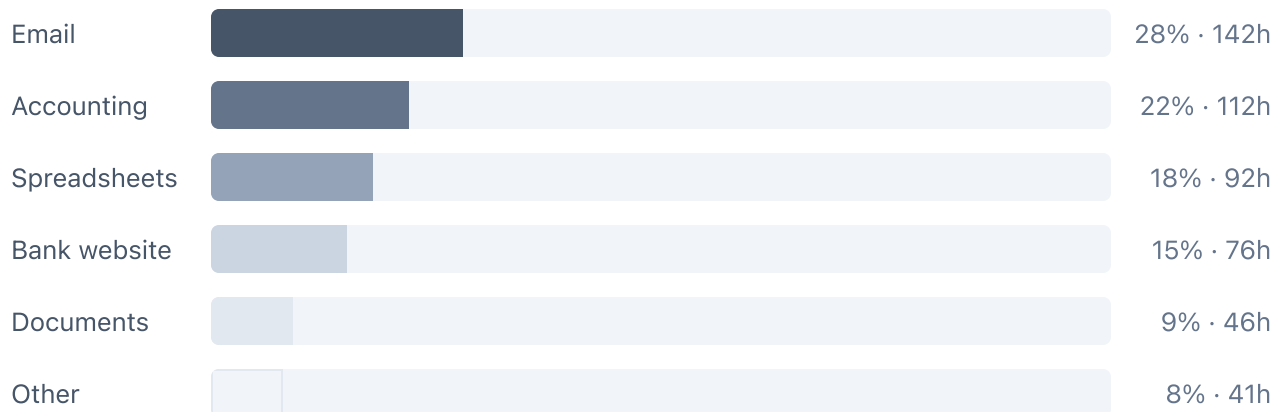
Process	Hours/Year	Savings
Daily Account Matching	~470 h	\$40,000
Weekly Supplier Payments	~140 h	\$12,000
Email Sorting	~240 h	\$20,000
Total	850 h	\$72,000

How We Did It

Two-week observation period

MemoryLane ran quietly in the background while your finance coordinator worked normally. The app captured periodic screenshots, identified which applications were in use, and detected patterns — the same sequence of apps and actions recurring over time. We analyzed **287 activities** and identified **18 distinct repeating workflows**.

WHERE TIME WAS SPENT



WHAT MAKES A GOOD AUTOMATION CANDIDATE?

Repetitive

Same steps happening daily, weekly, or every time a certain email arrives.

Rule-based

Decisions follow clear rules rather than requiring judgment.

Multi-app

Time wasted switching between apps and copying data.

1

Daily Account Matching

~470 hours/year · \$40,000 potential savings

PROCESS MAP

Accounting Open bank reconciliation for business unit

Accounting Review unmatched statement lines — check amounts, dates, descriptions

Varies: Number of unmatched items, amounts, vendor names

Email Search inbox for matching invoice or receipt by amount or vendor

Documents Check if invoice already captured in document hub

Accounting Match transaction, code to correct account, reconcile

Accounting Move to next business unit — repeat for all 6 accounts

RECOMMENDATION

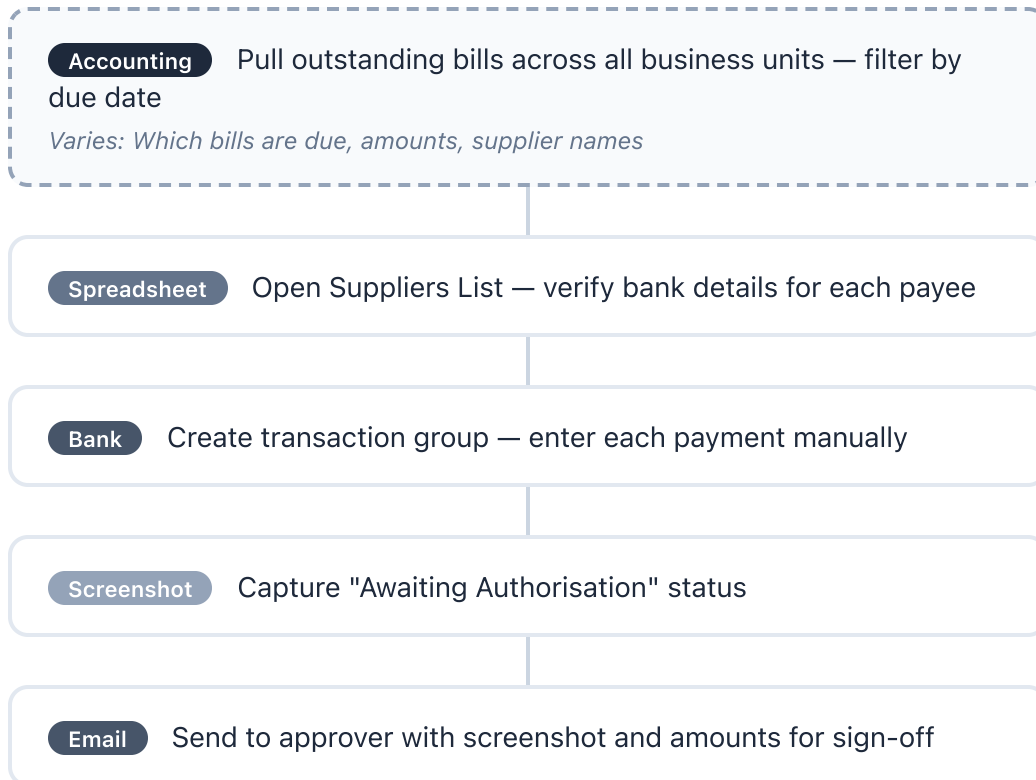
Set up **matching rules** in your accounting system for common payments — rent, subscriptions, regular suppliers. Forward invoice emails automatically to your document hub. **Time saved: ~9 hours/week → \$40,000/year.**

2

Weekly Supplier Payments

~140 hours/year · \$12,000 potential savings

PROCESS MAP



RECOMMENDATION

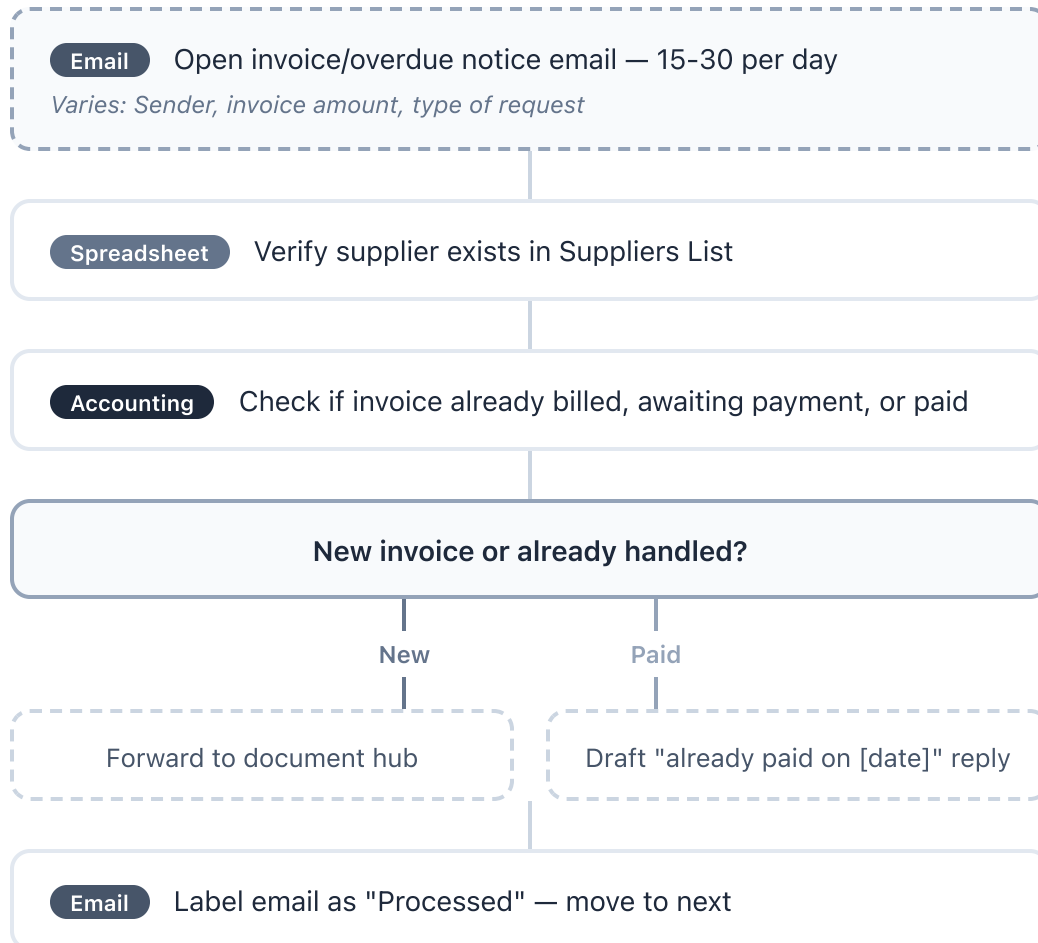
Replace screenshot-and-email with a **digital approval flow**. Auto-generate AP summary, send with checkboxes. Use bank's **batch file upload** instead of manual entry. **Time saved: ~3 hours/week → \$12,000/year.**

3

Email Sorting

~240 hours/year · \$20,000 potential savings

PROCESS MAP



RECOMMENDATION

Auto-forward PDFs to document hub intake. Create **canned responses** for common queries ("already paid", "need invoice copy"). Use **email filters** to pre-sort. **Time saved: ~5 hours/week → \$20,000/year.**

What's Next

Quick wins to implement first

START WITH THESE

- 1 Set up bank rules in your accounting system**
For recurring vendors (rent, software, utilities), create auto-match rules. Takes 30 minutes to set up.
- 2 Auto-forward invoice emails**
One email rule: anything with a PDF attachment goes to your document intake.
- 3 Create canned email responses**
Draft 3-4 templates for common queries — insert payment details with a quick lookup.



Your data stays on your computer

MemoryLane is a **desktop app**. All screenshots and activity data are stored locally on your device. When we use AI to analyze patterns, we connect through **zero-data-retention endpoints** — the AI provider doesn't store or train on your information.



MemoryLane

Workflow analysis that respects your privacy

Generated from screen activity data. This report reflects observed behavior over a two-week period in September 2025. 287 activities analyzed, 18 workflows identified, 3 selected for detailed recommendations.