



# The Sherlock Holmes Method for Finding Your Next Automation Goldmine

“You see, but you do not observe,” Sherlock Holmes famously told Dr. Watson. In the world of enterprise automation, most companies are making Watson’s mistake—they see their daily operations but fail to observe the patterns that reveal automation goldmines hiding in plain sight.

After helping dozens of enterprises identify their highest-impact automation opportunities, I’ve discovered that the best use cases aren’t found through grand digital transformation strategies or expensive consulting studies. They’re discovered through what I call the “Sherlock Holmes Method”—methodically observing the repetitive patterns that everyone else has become blind to.

The secret? Look for the enterprise equivalent of footprints in the mud: transactions that happen over and over and over again, following the same predictable patterns, while passing through multiple disconnected systems like a relay race with broken batons.

---

## Elementary, My Dear Watson: The Anatomy of an Automation Goldmine

Holmes solved cases by observing what others overlooked—the scuff mark on a shoe, the ink stain on a cuff, the dog that didn’t bark. Similarly, the best automation opportunities have tell-tale signs that become invisible through familiarity:

### The Repetition Pattern

Like the rhythmic footsteps Holmes could identify from three floors up, high-value automation targets exhibit consistent, high-volume repetition. Sourcing transactions are

perfect examples—companies process hundreds or thousands of purchase orders, vendor approvals, and contract renewals following nearly identical patterns.

## The Silo Handoff Mystery

Holmes often solved cases by mapping seemingly unrelated events. In enterprise operations, watch for the “transactional baton passing”—where the same information gets manually re-entered as it moves from sourcing systems to procurement platforms to claims management to financial systems. Each handoff is a clue pointing to automation opportunity.

## The Legacy System Archipelago

Just as Holmes connected dots across London’s districts, observe how information travels across your system landscape. That sourcing platform that doesn’t talk to your buying hub, which can’t communicate with your claims system—each gap represents friction that automation can eliminate.

# The Case of the Missing Integration: A Real-World Investigation

Let me illustrate with a recent “case” we solved:

### Case Study: The Vendor Onboarding Mystery

**The Crime Scene:** Vendor onboarding across 6 touchpoints

1. Sourcing team receives vendor application (System A)
2. Information manually re-keyed into procurement system (System B)
3. Approval workflow triggers (still in System B)
4. Results manually entered into vendor master (System C)
5. Payment terms manually configured (System D)
6. Vendor notification sent via email (Manual process)

**The Evidence:** Every handoff involved manual re-keying, taking 14 days and touching 6 different people for a process that should take 2 hours.

**Holmes’ Observation:** “Watson, notice how the same vendor data appears in identical format across four systems, yet no one has connected these obvious dots.”

### Automation Impact Results

**Processing Time:** From 14 days to 2 hours

**Error Reduction:** 90% fewer errors

Staff Impact: Freed to focus on strategic vendor relationships

Method: Automated data packages seamlessly moving between systems

---

## The Holmes Method: Your Investigation Checklist

### Step 1: Follow the Paper Trail (Even if It's Digital)

Map where the same information appears multiple times. If you're re-typing vendor names, addresses, or contract terms more than once, you've found a clue.

### Step 2: Time the Handoffs

Holmes timed everything. Measure how long information sits between systems. If a purchase order takes 3 days to move from approval to processing, investigate why.

### Step 3: Count the Touches

Every time a human handles the same piece of data, mark it down. Five people touching the same vendor setup? That's your smoking gun.

### Step 4: Listen for the Complaints

Holmes paid attention to what locals complained about. Your staff's daily frustrations—"Why do I have to enter this again?"—are testimonies pointing to automation opportunities.

### Step 5: Look for the Pattern Within the Pattern



***Holmes' Rule: Not all repetitive work is worth automating. Focus on transactions that are both high-volume AND follow predictable patterns. Sourcing transactions excel here because they follow regulated processes with clear decision trees.***

## The "Don't Boil the Ocean" Principle

Holmes never tried to solve all of London's crimes at once. He focused on one case, gathered evidence methodically, and solved it completely before moving to the next.

Apply the same discipline to automation:

- **Pick ONE high-friction handoff point** to start with
- **Automate it completely** before expanding
- **Create clean data packages** that next systems can easily consume
- **Measure the impact** before tackling the next case

This approach builds momentum and proves ROI, making it easier to get budget for the next automation project.

## The Network Effect: When Cases Connect

Here's where the Holmes analogy gets even more powerful. As you solve individual automation cases, patterns emerge across your entire operational network. That vendor onboarding automation suddenly makes supplier risk assessment easier. The contract renewal automation feeds into spend analysis. Each solved case strengthens the others.

Soon you're not just automating individual processes—you're creating an intelligent transaction network where information flows seamlessly between previously disconnected systems.

---

## The Adventure of the Obvious Clue

The most valuable automation opportunities are often hiding in plain sight, like Holmes' famous "purloined letter." They're the daily processes everyone accepts as "just how we do things" without questioning why we re-enter the same vendor information five times or manually copy contract terms from PDFs.

### Three Classic Automation Clues

**The Case of the Perpetual Re-Keying:** Look for anywhere your team says, "I just need to copy this information from X system into Y system." That's not a minor inconvenience—it's evidence of a systemic inefficiency worth hundreds of hours annually.

**The Mystery of the Approval Queue:** Investigate any workflow where documents sit in approval queues for days. Often, the delay isn't decision-making time—it's information

gathering time that automation can eliminate.

**The Curious Incident of the Excel Workaround:** Pay special attention to any process involving regular Excel exports and imports between systems. These are breadcrumbs leading directly to automation gold.

## Elementary Conclusions

Holmes succeeded because he observed patterns others missed, connected seemingly unrelated clues, and solved cases methodically rather than attempting everything at once.

The same approach reveals enterprise automation opportunities:

- **Observe** the repetitive transaction patterns everyone else ignores
- **Connect** the dots between disconnected systems and manual handoffs
- **Solve** one complete use case before expanding to the next
- **Build** momentum through proven successes rather than grand promises

The game is afoot in your enterprise—and the clues are everywhere, waiting for someone with Holmes’ observational discipline to connect them into automation solutions that transform daily operations.

After all, as Holmes might say if he were a process improvement consultant: “When you eliminate the impossible manual handoffs, whatever remains—however automated—must be the solution.”

---

process-automation

enterprise-efficiency

digital-transformation

sourcing-automation

systems-integration