

# CB Transformation

Operational and digital transformation, delivered.

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## **COMPANY OVERVIEW**

Most organisations run on manual processes, disconnected systems and established workarounds. We fix that.

CB Transformation is an operational and digital transformation consultancy helping organisations improve the way they work through connected systems, intelligent automation and hands-on delivery - creating simpler workflows, better visibility and more efficient ways of working.

FOUNDED — 2026

UK-based consultancy

FOCUS — SMEs & Public Sector

DELIVERY — Embedded & Hands-on

### **Chris Bones**

Founder & Transformation Lead

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## OUR TRANSFORMATION PILLARS

### 01 — Discovery, Analysis & Transformation

*We find what's holding your business back and design a clear path forward.*

- Diagnostics and performance reviews
- Transformation strategies and roadmaps
- Process mapping, analysis and documentation
- Requirements gathering and stakeholder workshops
- Workflow optimisation and improvement
- Change management and implementation support
- Project management of transformation programmes

### 02 — Intelligent Automation & Digital Enablement

*We design and implement connected systems, workflows and automation that help organisations work more efficiently.*

- Systems implementation and configuration
- Microsoft 365 setup, configuration and optimisation
- SharePoint architecture, intranets and document management
- Power Automate workflow design and build
- CRM selection, implementation and configuration
- Digital forms, approvals and Teams integrations
- AI-assisted automation via Microsoft Copilot
- Reporting and dashboard development
- User training and adoption support

### 03 — Delivery, Support & Performance

*We manage delivery, provide visibility and support the ongoing performance of your operations.*

- End-to-end project management and delivery
- Stakeholder coordination and reporting
- Power BI dashboards and KPI reporting
- Executive reporting and management information
- Performance analytics and data visualisation
- Ongoing support and continuous improvement
- Systems and automation support
- Leadership and delivery support



## HOW WE WORK

Every engagement follows a practical four-stage approach focused on clarity, structured delivery and measurable improvement.

01 — **Discover** Understand current processes, systems, operational challenges and areas creating unnecessary manual workload or inefficiency.

02 — **Design** Design practical workflows, process improvements and digital solutions aligned to the way the organisation actually works.

03 — **Deliver** Implement systems, automation and improvements through structured, hands-on delivery and collaboration.

04 — **Optimise** Provide ongoing optimisation, support and continuous improvement to ensure solutions continue delivering value over time.

## WHY CB TRANSFORMATION

### People, Processes & Technology

Successful transformation isn't just technical. Real improvement comes from understanding how people, processes and systems all work together, and translating needs into practical solutions people actually understand and can use.

### Operational Thinking First

Technology should support operations, not complicate them. Every solution is designed around how organisations actually work day-to-day.

### Clear & Practical

Hands-on support through planning, implementation, delivery and ongoing improvement — not just a strategy document.

### Efficiency & Simplicity

Reducing manual workload, improving visibility and helping organisations work in a smarter, more connected way.

## GET IN TOUCH

Ready to modernise operations, improve visibility and simplify delivery?

EMAIL — [hello@cbtransformation.co.uk](mailto:hello@cbtransformation.co.uk)

PHONE — 07356 260126

WEBSITE — [www.cbtransformation.co.uk](http://www.cbtransformation.co.uk)