

“We couldn’t go back to our old way of working now”

6 trust leaders on how workflows have improved operations in their trust forever



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Foreword: Why workflows?



Ed Butcher
Product Director,
Arbor Workflows

Whether you're a 2FE primary school or a sixty-school MAT, your organisation is made up of innumerable processes.

From making a complaint to minibus booking forms, through to onboarding new staff members and getting ready for an Ofsted inspection, these processes rely on different people, different systems and different policies all working together. It's corporate scale complexity, and yet, trusts are expected to manage without the corporate scale staffing, infrastructure or budget.

The problem with this isn't that MATs grind to a halt. It's that the people within the trust, from the central team through to on-the-ground staff, have to shoulder the administrative burden of keeping processes knitted together and moving along. That means death by spreadsheet, capacity for error or non-compliance, lack of standardisation and, most importantly, a whole lot more bureaucracy for a workforce already suffering a workload crisis. In short, operations can be messy and it's the staff who have to pick up the pieces.

I saw all of this for myself when I became a trust leader for a small trust in London, in 2019. It quickly became clear how hard it is to align everybody at trust-level, and how difficult this feels on the ground for schools when things just don't seem to work as they should. It can create an us vs. them dynamic, because everybody just wants to be getting on with their own work without having to worry about whether processes are running as they should. Repetitive, manual admin swallows so much time. It causes delays in communication, decision-making and action – and leads to avoidable errors.

I knew this was not a sustainable way for MATs to run. Particularly in the context of a workload crisis, and a sector where many trusts are growing in order to build financial resilience. It was clear to me that schools and trusts needed a new way of working. A way of working where processes are

automated from start to finish, bringing together people and systems into one interface. In other words, trusts needed workflows.

So, how do you, as a trust leader, change your way of thinking to a workflows way of thinking? What does having your processes automated really feel like? What kind of processes can and should be automated in your trust? Six trust leaders (who have been automating their processes for several years) answer these questions and more in this eBook. You'll hear from:

- Red Kite Learning Trust on how they're using workflows for good, including for SEND funding and charity bidding
- Castle Phoenix Trust on how they've automated staff onboarding from start to finish
- Learners' Trust on the powerful impact of workflows for their teams at school level
- Consortium Trust on how they're measuring and driving CPD impact with workflows
- Educate Together on how introducing workflows has helped bring five schools across four LAs closer together
- LEO Academy Trust on the workflows changing the game for every team in their trust, from HR and Marketing, through to Cyber Security and Operations

The one question which remains is, why now? As of March 2026, we're excited to announce that Arbor Workflows is a whole new part of your MIS. It gives you the tools to turn any manual process into something which Arbor can run for you. All of the people you hear from in this book have already integrated Arbor Workflows into their ways of working, so you can hear first-hand about the difference that it's made for their staff. We're really excited to be going on this journey with the schools and trusts in our community, and seeing the impact it has on school staff across the country.

I hope you finish this book feeling inspired to try Arbor Workflows at your trust, and equipped with plenty of practical examples to get you started.

I can't wait to hear what you think,

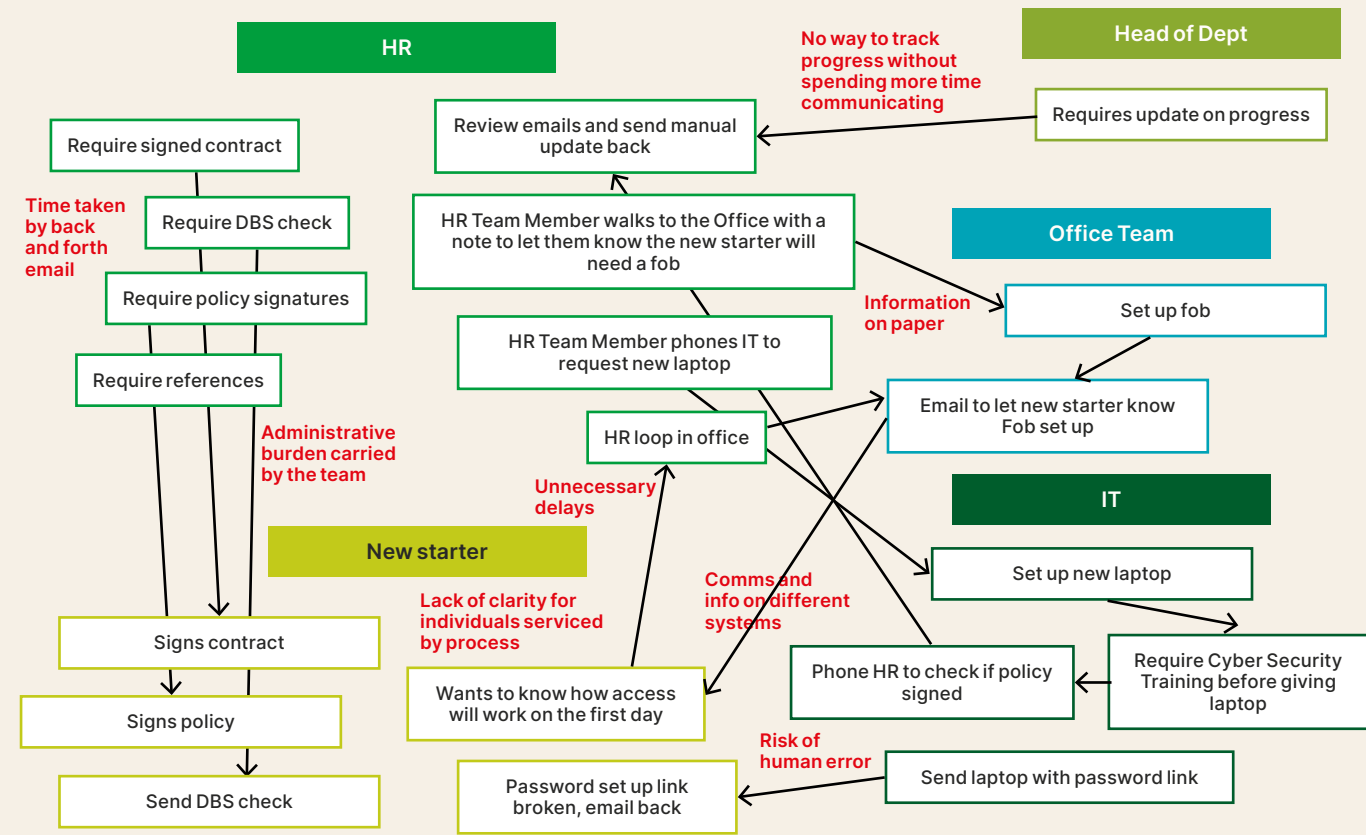
A handwritten signature in black ink, appearing to read 'Ed Butcher'.

Ed Butcher
Product Director — Arbor Workflows

What is a *workflow*?

Before Arbor Workflows

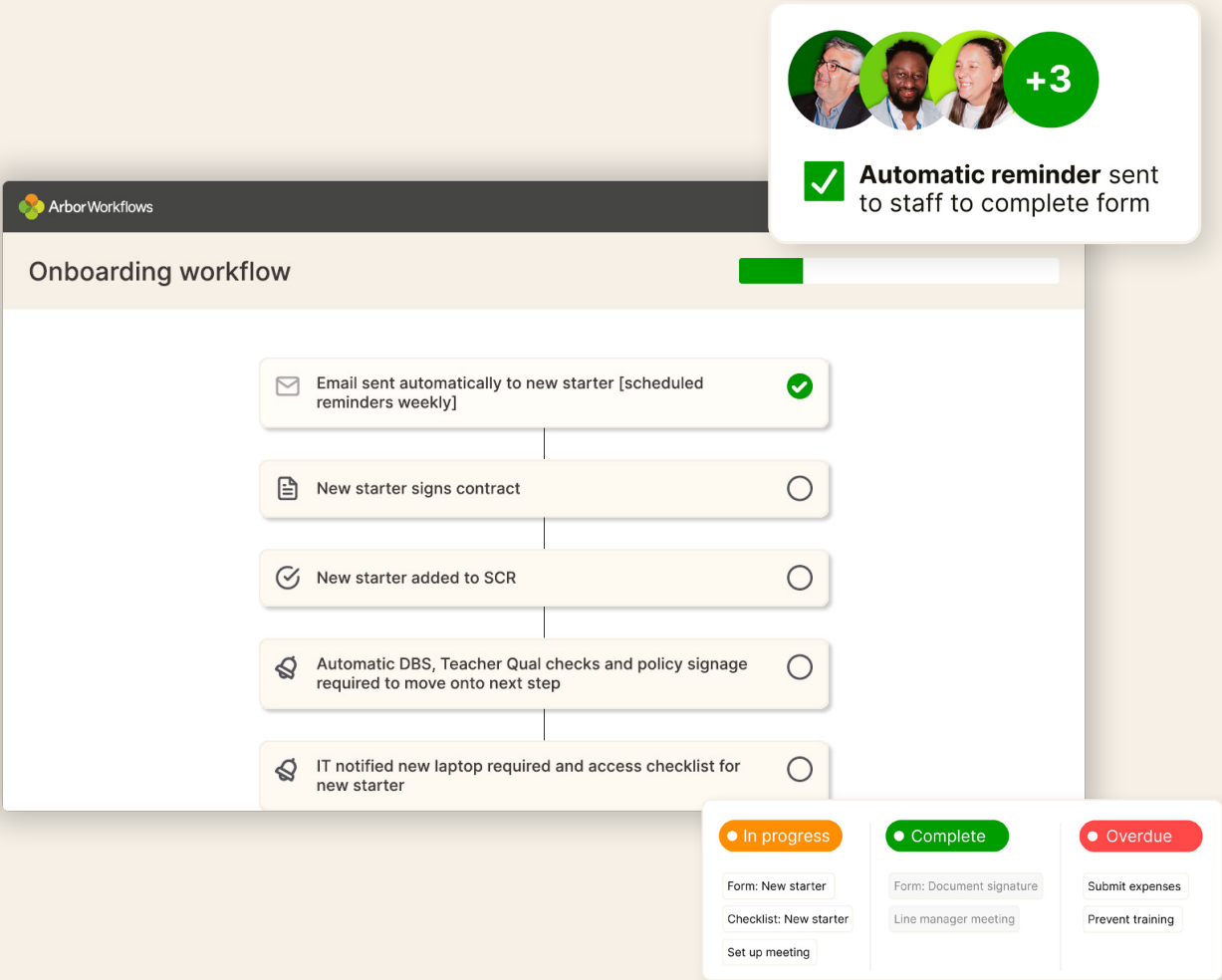
How are trusts working today? Without workflows, nothing is automatic, meaning things don't flow as they should, causing delays, and creating more work for everybody in your trust.



noun /'wɜːk-fləʊ/
A workflow is a series of actions which Arbor can run for you to help you get something done.

With Arbor Workflows

Arbor Workflows puts your everyday admin on autopilot. It gives you the tools to turn any manual process into something which Arbor runs for you.



Turning Paperwork into *Purpose*:

How workflows are powering real
impact at our trust



The infographic features a green background with white text. At the top left is the Red Kite Learning Trust logo, which includes a stylized red kite. Below the logo is a portrait of James Rant, CFO of Red Kite Learning. To the right of the portrait, the text 'Schools:' is followed by a large '16' and the description 'mixed-phase schools, inc. all through and schools with 6th forms and nurseries'. Further right, the text 'Location:' is followed by 'Harrogate and West Yorkshire'. At the bottom, the text 'Students:' is followed by a large '10,000'. To the right of the '10,000', the text '6 secondaries with two 6th forms' is displayed.

Schools:
16 mixed-phase schools, inc. all through and schools with 6th forms and nurseries

Location:
Harrogate and West Yorkshire

Students:
10,000

6 secondaries with two 6th forms

James Rant
CFO, Red Kite Learning

In recent years at Red Kite Learning Trust, we've taken on one school per year. Whilst we don't consider ourselves to be a directive MAT, this kind of growth has enabled us to refine our processes and standardise where it matters most. To make sure our community is exactly that — a community — we have four non-negotiables that schools have to adhere to, which we call our central pillars. The four pillars are that schools must have the same HR system, finance system, MIS and IT. These pillars mean that all our schools are built around the same infrastructure, as we know that collaboration and joining our systems up allows us to provide the best service to our schools and drive economies of scale. When thinking about workflows, it seemed an opportunity for us to all work better, together, in a way that we could uplift all of our staff and students, and tackle shared problems.

What we've automated

The workflows below are processes we've automated with this ethos in mind: providing the best service to our schools, our staff and our students.

1. The Red Kite Foundation (fig. 1)

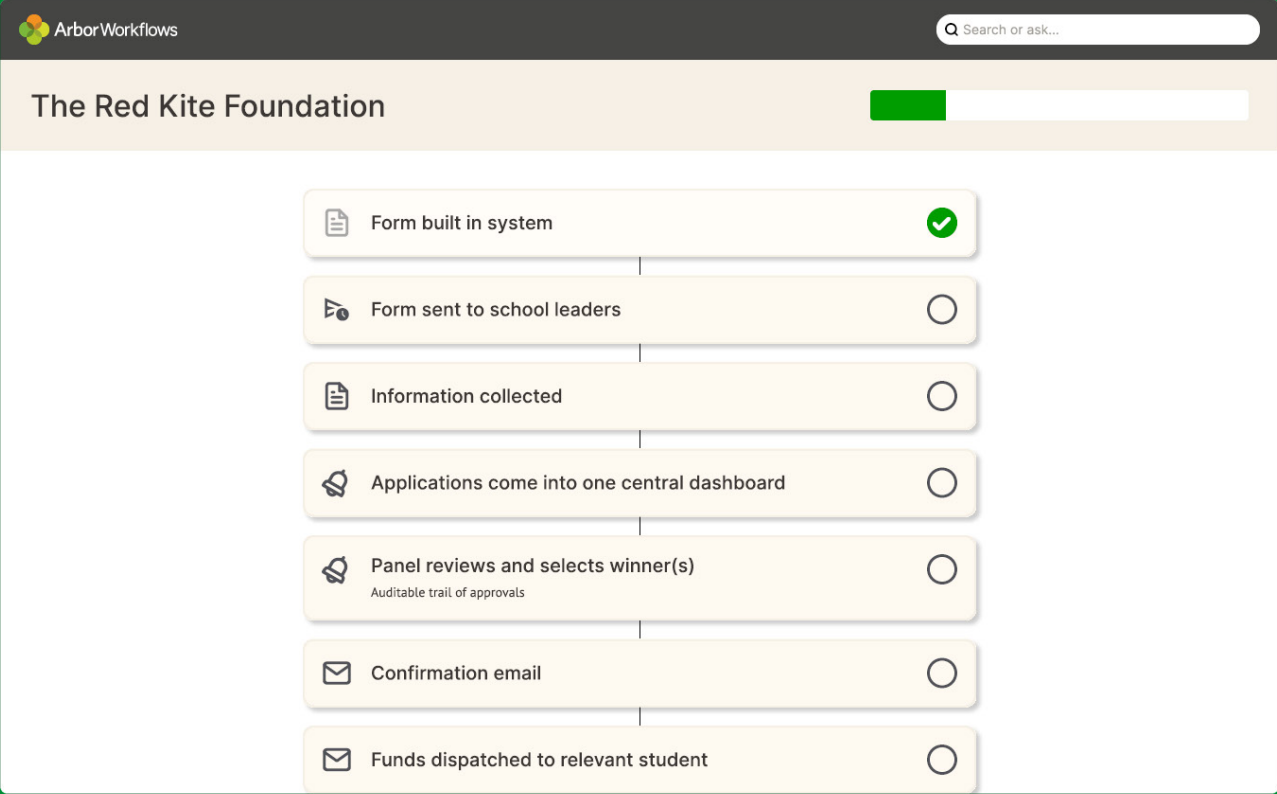
This was our initial reason for looking into automated workflows. The Red Kite Foundation is a charity we run which takes the money we get through our trading aspect and channels it to headteachers or other leaders hoping to make a real difference, with the staff in question bidding for a share for their individual projects / suggestions.

Originally, we started with a figure of around £20,000. The ambition was that this pot of money could be transformed into creating special memories and programmes for pupils that they wouldn't normally have access to, often linked to deprivation or lack of opportunity. This could be giving somebody access to a non-curriculum or non-standard trip they would never normally be able to afford or sports opportunities. For example, we had one

student who was an elite swimmer but couldn't afford the transport to get them from the school to the pool regularly, so the fund was there to help, and they're now able to represent Team GB.

As with any kind of well-meaning project like The Red Kite Foundation, there are lots of big ideas and moving parts: the financial operations, a judgement panel to assess the different bids every term, collecting the information, delivery of funds etc. We knew a workflow was the best way to do this, because it makes it simple for everybody at every stage of the process. It's all in one place, brings everyone along on the same timelines, the administrative burden doesn't fall to one individual, and any bid submissions can't get lost in an email inbox. The standardised form also means that the submissions are easier to judge, as there are no discrepancies e.g. one entry being two sentences and another ten pages. Overall, the best part is that admin doesn't get in the way of a great cause.

Fig. 1



2. Staff expenses

We get staff expenses when staff like myself have to travel between schools, or for stationery etc, and we needed a better way of monitoring and paying said expenses. Before having a workflow, we had a paper form which is not secure, not configurable, not efficient and prone to human error. Digitising is a non-negotiable for many aspects of education life, and expenses was just one of those processes we knew we not only needed to digitise, but also needed to automate. No more receipts at risk of loss, no more emails back and forth.

The other big, big win for us was around VAT. Different car types allow you to claim back different amounts of VAT, but a paper form made this information tricky to gather: has that person got a two litre diesel or is it a one litre petrol? It's so much easier with a digital form

with a drop down menu, showing people the available options. We estimate that we've saved about £800 a year through the introduction of this workflow, which already offsets any additional software costs. And the same goes for any kind of expense drop down. Unless you're a finance person specifically, you may not be familiar with different expense codes. Automation takes away that reliance on a human to double check against every code.

And with that comes the reduction in human error and improvement of accuracy. With our previous system, even when we tried to use digital forms that weren't fit for purpose, colleagues might, for example, build up a whole term's worth of mileage. They'd then calculate this themselves at the end of term. Previously, that resulted in a lot of back and forth for

us where things had been added up incorrectly. Through automated workflows, we've also built in a summary, which means everything is done for our staff.

3. SEND

This is our in-progress workflow. There's a big focus on SEND at the moment, and we want to make sure that we're giving our SEND students the best possible experience we can in our trust. The workflow we're building is about maximising the time of our highly skilled, brilliant inclusion leads. Getting an educational healthcare plan for SEND students requires a lot of paperwork and evidence, and a high level of skill similar to that of bid writing. To get the funding you need from the local authority, you need to know how to write the application persuasively, because the local authorities themselves are struggling with funding.

We wanted to automate as much of the paperwork as possible, so that our leads could spend time on the detailed, technical parts of the process that demand so much of their time. The workflow we're currently creating will automatically populate the routine fields, like name, date of birth, and all the other sorts of information we already hold in our systems. One of our secondary schools has 60 children with an EHC plan, who all require at least one annual review, so the administrative side of things is immense. Having this workflow in place will minimise that admin burden.

I think every trust leader will sympathise with our priorities and pressures: squeezing budgets and a real need for funding for SEND. If this workflow can help us generate more funding for our SEND students, then we're really using technology for the better.

Our community

Schools have always joined the Red Kite Learning Trust because our values align and they buy into our culture. We're not a trust who have set out to standardise and centralise everything down to the curriculum, but the benefits of top-level standardisation, such as with HR and Finance, are increasingly apparent to all of the people in our trust community. Of course, there's a cost saving in economies of scale and procurement discounts, but it's far more than that. It's about us all having a similar way of working and thinking, so that processes on an individual level are smarter and more effective. And with outputs like the ones we've realised with our workflows, it's hard to argue against how this has brought us together as a trust.

Compliance, Collaboration and Continuous *Improvement*:

Changing the staff experience at
Castle Phoenix using workflows



At Castle Phoenix, we’re always looking for how we can do things differently and innovate, a mindset which is spearheaded by our CEO. That means technology is permanently at the forefront of our strategy. Last year, one of our main strategic priorities was around our growth, but not growth in terms of new schools joining our trust: growth as in expanding our central capacity so that we had the infrastructure in place to enable all of our staff feel equipped for potential schools to join the trust in the future.

With innovation comes a focus on continuous and proactive improvement: we don’t settle for less, as we should be providing the best service we can to our schools. What we’re aiming for is one joined-up and collaborative organisation, where the systems we have in place make it easy for school staff to do their job well, and to collaborate with each other.

That goal is tricky to achieve when you have everything in countless spreadsheets and systems, with different people brought in at different times but no single source of truth to hold us all to the same account and timeline. All of this is why automation became, and continues to be, such a big focus for us.

Starting with HR

At the time we began thinking about automation, our HR team was undergoing significant people and structural changes. Not only that, but HR teams always have lengthy processes which bring in people from all over the organisation. We have a central People function, as well as

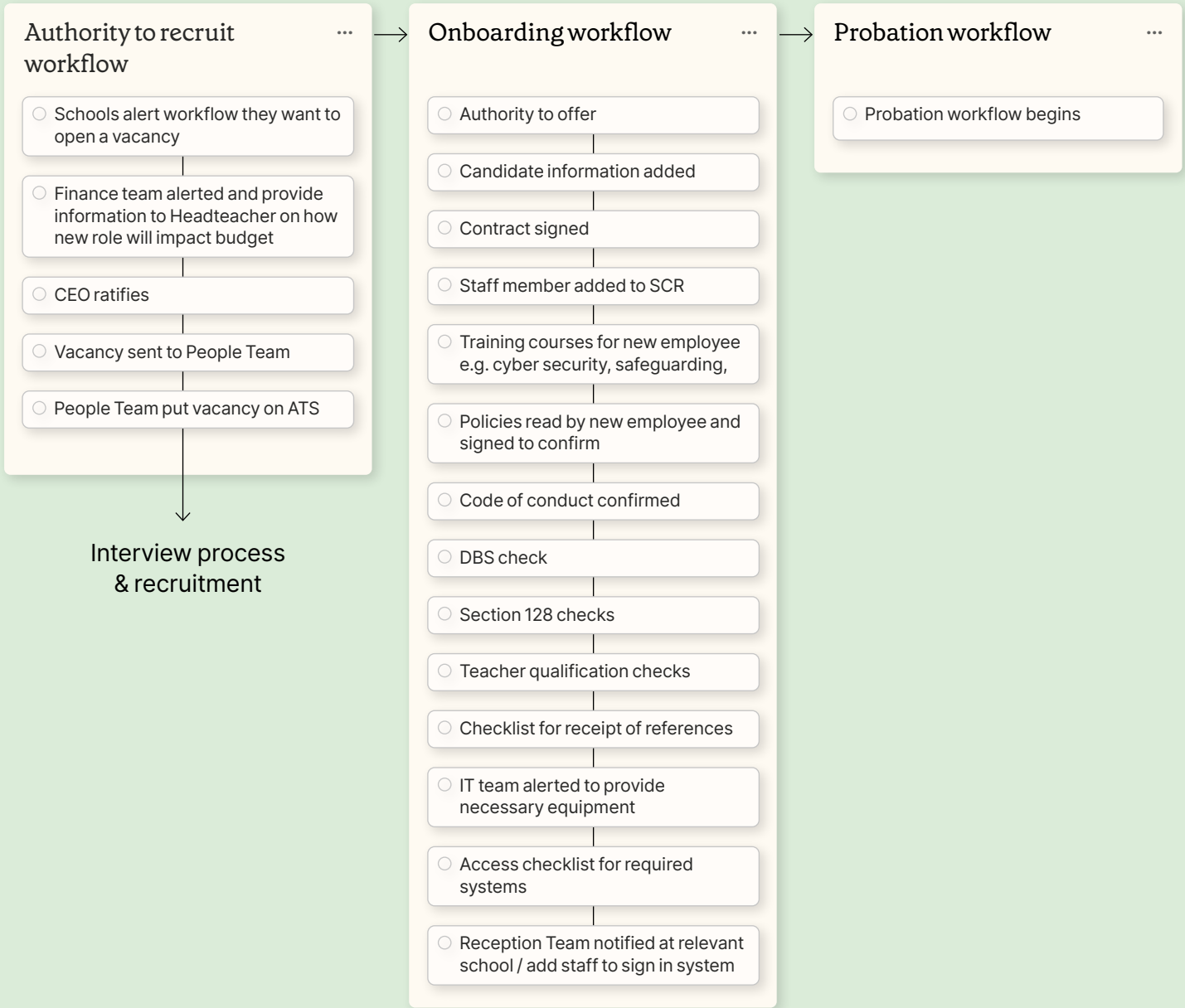
school-level HR support in each of our schools. We therefore felt HR workflows were the perfect place for us to start.

Our initial goals were around compliance and bringing everybody onto the same page. In HR, processes can be contentious and have no room for mistakes, especially anything involving pay or compliance, so accountability and removing the opportunity for human error was a key point for us in automating large-scale processes. As well as this, we wanted to reduce the manpower required to manage large processes, like onboarding a new member of staff, so that we could use our time on more strategic and people-first work.

In practice

The biggest workflow we have, and the one which best encompasses how it’s transformed the way we work, is our **onboarding workflow** (fig. 2), which takes the organisation from approving a vacancy through to the new employee’s receipt of the right fob for their school’s front gate. Everybody is notified

Fig. 2



automatically once the previous step has been completed, and everything is accessible just through one system.

This process reaches all levels of the organisation, so it's a gamechanger that we now have a system which lets people know when they need to complete a task, and removes the in-between need for chasing and checking whether someone else has completed the step on which you're dependent. The visibility and

transparency over the stages of a workflow (whether that's onboarding or something else), is brilliant, both for headteachers, school HR Support and at a trust-level. Staffing is the biggest cost for any trust or school, and in the current climate, recruitment can often be challenging. Having the process streamlined means that everybody can be as effective as possible in delivering where they need to.

Also, recruitment in education can feel hectic, as it comes in waves. In September, we had over 50 new starters join us across the trust, and doing that process without automation is unimaginable to us now. The workload is immense, so by having a system automatically bring you in when you need to be, and you can rely on to be accurate, really changes the way you work. I (Charlotte) also experienced this workflow from a candidate's perspective and it left an excellent impression of the trust, as the process was smooth and efficient. It gives candidates a clear sense of who we are: forward-thinking, prioritising digital literacy and innovating new approaches to make life easier.

How it's changed our team

Automating our processes means we can take a step back and not be bogged down in the manual admin of making that process flow. Before automating our big HR workflows, there was quite high turnover in the team, but that's now stabilised because lots of the transactional work has been removed, enabling the team to focus on just doing the tasks they actually need to do.

We were all involved in the creation of our workflows. It's important that it's a team effort, the mapping out, because only then can it benefit every person. And similarly, there's always something that we're changing or tweaking. It comes back to that mindset here at Castle Phoenix of always finding a better, more effective way of doing things. We really want to champion collaboration and automating our processes is achieving that, but only because we've all invested in making sure they're as effective as possible and committed to continuous improvement. Collaboration and Innovation are two of our trust values.

It's key for us that this is felt throughout the trust and that our vision and culture is embedded not only from a thorough operations perspective, but really felt

by the individuals in our schools. Our school-based teams previously had to engage with the transactional work, and so they really benefit from those in-between administrative tasks now being automated. They like being able to keep track of their new starters, for example, without having to dip in and out of spreadsheets, and knowing that everybody is compliant and progressing through the onboarding journey as they should be. It makes their life so much easier.

What's next?

Being one of our trust values, innovation remains at the heart of what we do. The more we innovate and automate, the more we can free up our staff to focus on delivery and strategic work, which gives a better experience to every individual in our trust community. Our focus going forward is reviewing everything we're doing already, whether it's a process or system, and making sure we're as efficient and as effective as we can be.

Trusts can be tentative about taking on this kind of automation, particularly as schools have traditionally been paper-based, and that can be quite a mindset shift. At Castle Phoenix, we have worked hard to remove paper-based systems and implement electronic or digital where possible.

The implementation of automation and removal of paper based systems has enhanced our data protection compliance. It has also allowed us to think where time can be saved and where money can also be saved. Most importantly, thinking about where workload can be reduced and how we can make the working experience for all staff better. We are constantly asking ourselves these questions, and this is why we are now such strong advocates for automation.

Building with Workflows:

The architecture of a trust built to last



Matt Freeston
CEO

Schools:

18

(soon to be 20)

Location:

Rotherham,
Derbyshire, Derby

We are about to celebrate 10 years of Learners' Trust. Having been there since the beginning as CEO, it's exciting to see how the plans we put in place still ring true. A decade ago, we took the time to really research the way we should operationalise the trust and how it should look and feel, almost designing a franchise model based on ratios. For instance, every six schools, we needed a trust improvement officer and a trust technician. For every 18 schools we need a full time HR officer. That ratio we put in place to safeguard capacity is still in place today. That means we've not gone through reinvention on a massive scale. Instead, we've committed to a model which works for us, which we constantly reflect on. It gives us consistency, confidence and scalability.

I think the approach I've taken to Learners' is through an architectural mindset. I like building systems and processes for sustainable provision and improvement: things which are going to have an impact, and last. Even before we knew there was a system designed for trusts to automate their processes, we were trying to achieve the same result through trial and error. We wanted to build that trust across our organisation, giving clarity, security and confidence. It's hard to get competency on a consistent basis. So, when we did find that there was software designed to help us do just that, we jumped in with both feet. We were able to achieve what we wanted to: our processes are no longer reliant on one person and we can all complete them to the same standard, every time. A workflow is simple for people to follow and it's there to stay, so if the member of staff who thought it up moves on to somewhere new, they don't take the knowledge and ownership with them.

The building blocks in our schools

Arbor Workflows has really transformed how we work. It's part of our solution for everything we face. We've got 50 HR policies ranging from dignity at work through to complaints and flexible working requests, and every time something like that comes up, the first question is: is it a workflow? Because that's always where it's going to end up. And we also know that by making it a workflow, we make that process secure and consistent.

When we first started with Arbor Workflows, we tried to pick up on things which were part of daily practice first, like our resource ordering workflow, because people were needing to order things all of the time. We thought it'd be a good one to get everyone just clicking on the link and using the system, which was our way of trying to win hearts and minds. That piece was really important to us, as culture is something we prioritise at Learners'. Everything we do and the way we work should reflect the culture we've committed to creating.

This way of thinking ensures we are all on the same page and heading towards the same goal. Automating our processes aligns with our culture because it gives us line of sight, parity in experience and brings us into that shared way of working all through the organisation.

Change management (fig. 3) is also integral to the way we work. It's something I took a personal interest in as part of my MBA, and so we've tried to embed the theory into our general approach in the trust through a ten step list on how to do a job properly from start to finish. We've built that way of thinking into a workflow, which is a great way of showing how our architectural and growth mindset can be embedded through our systems. The purpose of this workflow is to take a step back and elevate people's thinking.

It's research-based, effective self-evaluation, which means that any change we make across the trust will be implemented, understood and communicated and with purpose and efficiency.

The workflows benefitting our schools

Workflows have the potential to transform costs and culture at school level. There are so many processes in a school which would benefit from automation: complaints and grievances, surveys, forms, organising an event, development of teaching and learning or curriculum impact reviews. It necessitates a change of perspective, of thinking about your school in terms of the many processes within it. When you realise just how many processes there are, you can begin to realise just how big the impact could be. Workflows give school leaders that line of sight over a process from start to finish. It's about simplifying and securing those processes you do all the time, to the same standard.

An example which springs to mind is our **Ofsted workflow** (fig. 4). Building an Ofsted workflow seemed an obvious thing to do, given that workflows relieve that administrative burden and an inspection is one of those times where that relief is particularly welcome. When the phone call comes, there is always going to be the onset of panic, followed by an immediate need to set up meetings and various admin tasks to get everything ready for the inspector, plus notifying members of staff. We've automated that entire workstream. We just push a button, fill in a few details and Arbor Workflows manages that admin for us. At the end of the first day, once you've had the meetings, we also have a step in the workflow to update and share insights with the people who need to see them. It's designed to ease the pain a little bit on an otherwise stressful day.

In schools, we always try and plan things in the worst case scenario, which is why we have risk assessments. If you've got a brand new member of staff who has never planned a **school trip** (fig. 5) before, it doesn't make sense to have

them reliant on another staff member who's been in post 58 years to take them through the process. What if that more experienced member of staff is sick, or has left the organisation? I want my school staff to know that the system is going to coach them through the process and make them go through all of the right steps, at the right time, everyone will be notified correctly etc. That risk of human error, siloed knowledge, and inconsistency is entirely removed. And it also means that everybody saves time. The more experienced member of staff isn't having to take time out of their day to make sure that process runs smoothly.

Our approach has been to map out the things we habitually do, to try and identify what we can automate next. The list is always growing, but we'd really like to take automation in the direction of school audit and evaluation. Things like learning walks: how can we gather information in a tangible and consistent way that we can refer back to? Another idea would be curriculum impact reviews. We'd love to have our leadership be able to go and assess

subjects in a consistent and timely way. Schools wouldn't then need coordinators, which is good because they often don't have the resources to fill that role and so somebody is having to do it as an additional task. Or even if you wanted to keep that role, having a workflow would speed up that process and make it far easier for the person in post.

Building to last

The idea of workflows can feel quite intangible. In schools, it's easy to get stuck in the immediate priorities of the everyday and be head-down in admin, without taking a step back and seeing the bigger picture, the web of processes that could be eased through automation. I really champion the idea of taking the time to consider, culturally, how automation could impact a school or trust and all the staff working within it. Learners' Trust is a living case study of why it's worth doing just that. By researching and investing our time in thinking bigger, we have created an architecture of systems and culture that is built to last.

Fig. 3

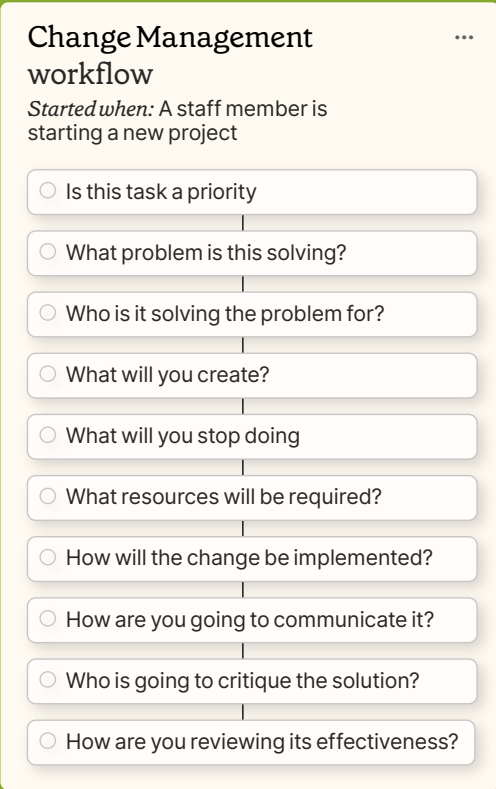


Fig. 4

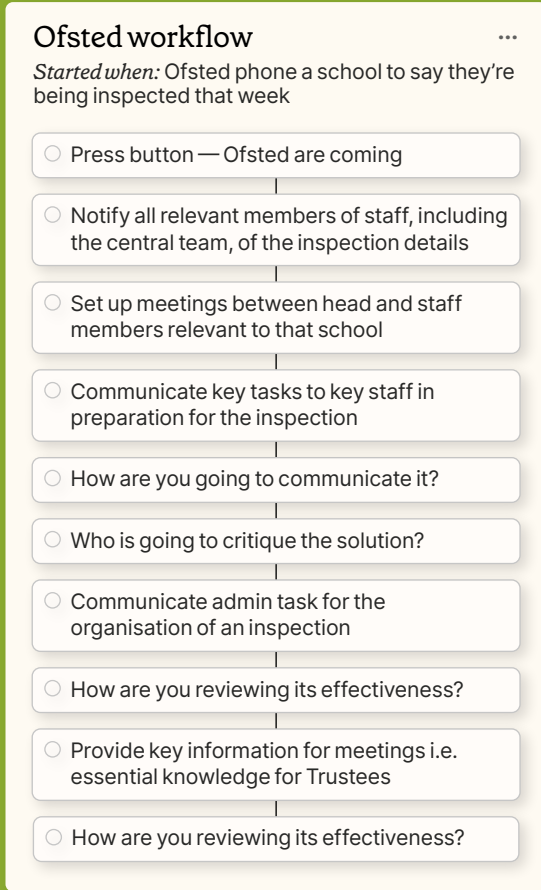
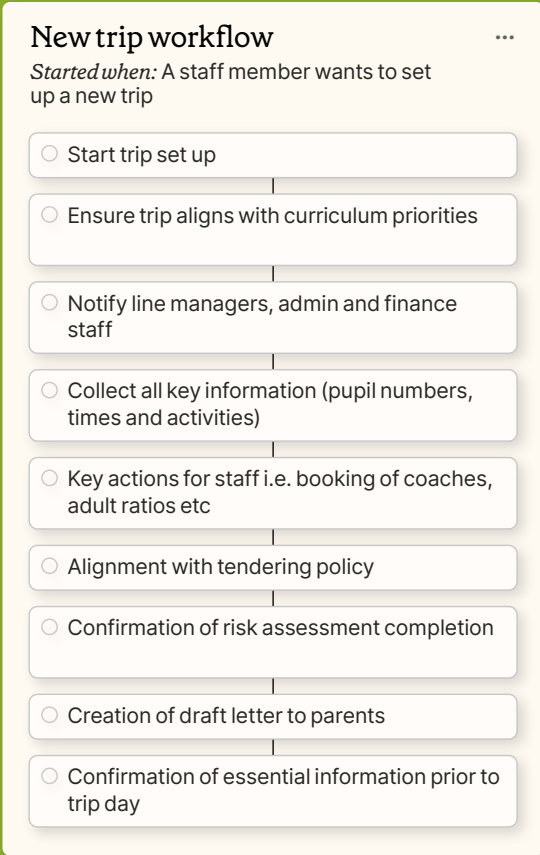


Fig. 5



Teaching an Old Process *New Tricks*:

How we use workflows to measure and deliver CPD impact



THE CONSORTIUM
ACADEMY TRUST



Danny Garton
MIS And Reporting Manager

Schools:

3 primaries

6 secondaries
with two 6th forms

Location:

Yorkshire

As soon as we saw Arbor Workflows and knew it was part of the Arbor Suite, we wanted to have it at Consortium. I was quite new to the trust at the time, and a big part of my remit was looking at efficiency of processes. And as with any new role, but particularly one which was introduced with the aim of fully centralising the team, a fair amount of my first 12 months were spent learning what direction the trust is going in, the priorities and key objectives.

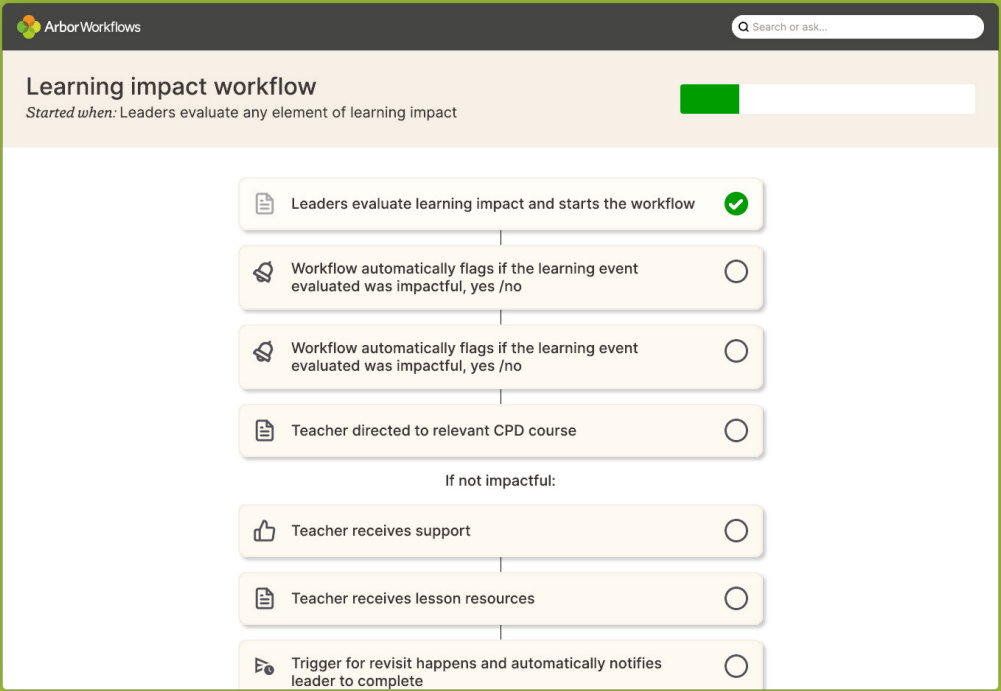
Naturally, everything is a key objective when it comes to trust leadership. So it was a case of having a look where you could get your quick wins first, and then drawing back on the bigger picture to set a strong foundation for future success. When we first brought our schools into the trust, our overall goals were around making sure all of our schools were rated 'good' by Ofsted. Now we've achieved this, the next step is looking at embedding outstanding performance across the board, supported by our bigger picture focus on having a streamlined and efficient organisation. We want to maximise what we're getting, whether we're talking about people or systems or processes. That means making sure that we have the right staffing structure from a support perspective, making sure that we have quality teaching in the classrooms and ensuring that our systems support that, e.g. with CPD of the staff.

Why automation?

If you're thinking about process efficiency to support your whole ecosystem, automation is the next logical step. We're not just thinking about saving time on admin when we talk about efficiency. We're asking, how can we most effectively and efficiently improve our offer for all the people in our trust? This has always been the goal, but our systems weren't always built for purpose, because they aren't designed with education in mind, such as Microsoft Forms.

A good example of this thinking in practice is our workflow around **learning impact** (fig. 6). Historically, our trust used SISRA Observe to try and measure learning impact in the classroom. When I joined, I introduced a system that I'd worked with at my previous institution which had a focus on staff CPD and identifying gaps, which was a move away from a scored observation model and a shift to being solution-driven. The next step, and the one which has really changed the way we work, is embedding this new model into a workflow.

Fig. 6



What happens now is that we use automation to review event outputs and identify where a lesson was not impactful, measuring it against our trust-wide teaching and learning framework which was put together by all of the school leaders. Through automation, any element of a lesson that is flagged as not impactful (according to the framework), is then flagged for a revisit about a month later. In that time, the staff member or members who were linked to the original evaluation will be assigned relevant CPD and receive the support they need. The staff member/s is also pointed to relevant learning resources. Our workflow then follows up with the member of staff once the training should be complete and effectively mediates that conversation with the Head of Department to make sure everybody feels as supported and in the loop as possible, without having to do all the paperwork that normally comes with these benefits.

Using this workflow (and links to PowerBI reporting) the evaluator and other relevant leaders can report on whether those interventions have had an impact e.g. they can see that the learners are now engaging more with recall exercises etc.

The result of all this is that the quality of work has improved, which is great for our learners, who are the reason we are all here. But more than that, it's also helping the staff by being proactive, rather than reactive, as well as measuring success, identifying gaps and plugging those gaps. Everybody is getting the support they need, and so it's a great example of how efficient operations can have a direct impact on the classroom. Not only that, but should Ofsted come in and ask what we're doing around the impact of teaching and learning, we can not only show where we've delivered CPD, but how effective that CPD has been.

Changing the culture

Operationalising and automating something like this does represent a culture shift, because it's reliable. At the same time, we're always careful not to impose things on our schools, so everything we've put together has been done as a team effort with our schools and based on iterative feedback from the people who are affected by and use the workflows we have in place. The thing that we like about the workflows, and about aligning it with our framework, is the transparency that comes with that. It removes the ambiguity - it's nobody's opinion vs. the other. Because the model is clear, and because people can track where things are in the process, it's clear for the staff.

Overall, this is why we are aiming for standardisation at Consortium. Every school needs to demonstrate outcomes and impact to their governing boards. By standardising processes and the understanding of what it underpins, it means you can more effectively deliver impact for everyone in the trust. We really champion transparency at Consortium, which is why our governors at all of our schools can access to anonymised comparative data of other schools in our trust, to make sure we're all working to the same standards and learning from each other. That's why I think standardisation and transparency go hand in hand, so we're all on the same page. And workflows is a huge part of that.

Collaboration

Ultimately, it comes back to the servicing of our schools and making sure they benefit from that central team structure. Schools now, when thinking about standardisation as a whole, are seeing the benefit to having that central, shared service, by learning from each other. Originally, a lot of schools may have thought that centralisation was just a way of cutting staff costs. But they're realising that it actually helps you manage risk, share

best practice and drive community. Our school leaders often come to us and ask to be put in touch with someone who has solved their particular problem in another school.

Collaboration is at the heart of any trust, and we're glad that we're able to foster that through shared learnings. It's also why we're really keen on joining up our systems as a whole and why we've bought so heavily into the Arbor Suite. At Consortium, we use Arbor, SAMpeople and Arbor Workflows. It's an attractive prospect to us as a trust, because it means that we're looking towards a future where everything within our organisation is under one roof, leading to operational efficiency and fluid data integration. Everything speaks to everything else, just like how we want the culture of our schools to be. Essentially, you can build more efficient processes because everything integrates.

At the moment, the workflows we have already automated are:

- [Trips and visits](#)
- [Recruitment Approvals](#)
- [Learning evaluations](#)
- [Requests for student equipment from local authorities to central IT team](#)

So you can see these are already bringing in lots of different workstreams and teams from across the trust. We're building more and more, and I couldn't go back to our old way of working now. But I like to think big, which is why I know our next stop is HR. There's so many people processes that we can get stuck into, so I'm looking forward to the next piece of the puzzle.

Five schools, four LAs, and a chance to *rethink* *our operations*



Sam Nowak
CEO



Lauren Evans
CFO

Our MAT began as a collection of free schools in 2014, but Educate Together predates this, having been established in Ireland to offer an alternative to the dominance of religious character in schools. Over the following eight years, we opened five free schools. All are now up to Year 6, apart from one school in Swindon which is currently up to Year 3. For our size, we are probably the most geographically spread trust in the country. Our schools stretch from Weston-super-Mare to Swindon, with three more across Bristol and Bath. This means five schools across four local authorities. Our unique history is central to our identity as a trust, and it also helps explain the role of process automation in our journey. We're all about finding ways to maintain connection and encourage collaboration between our schools and our central team.

As we explored automation, our central team was growing and we knew we needed to manage complex processes in a streamlined and consistent way with fewer opportunities for human error. We already had process maps, but we needed to ensure these were being followed accurately and that we had visibility from start to finish. For example, schools complete the on-the-ground onboarding tasks such as DBS checks and certificate copying. However, it is important for the HR Manager in the central office to know what stage the process is at. Before automating workflows, we did not always have confidence that timescales were being met or that each process was carried out in the same efficient way.

We also don't have school business managers, because of our centralised structure, and so the tasks of your typical SBM are shared between our central office and school level admin. These specialist functions are designed to take workload from the schools, and automation assists with that, as it joins this function up with the school

administrators. If we didn't have automated workflows, this workload of bringing everyone together would either fall to the school administrators or SLT. It changes the way you do things and drives efficiencies when the checks, reminders and follow ups are automatic. We're being brought onto the same page, which is essential when your taskforce is spread through different organisations, different levels and different parts of the country.

The opportunity for reconsideration and rebuilding

One of the things we didn't foresee happening when we began to automate our processes was the lens it put on our operations. Moving to a workflow way of operating, you not only automate your pre-mapped processes, but you also have the chance to improve them. You start to get feedback, you get rich data about how long a process is taking to complete, and you can spot places where there are snags or holdups. It's an opportunity to rethink and ask questions of the way you do things.

Our approach has been gradual, starting with some of the bigger and more important processes and then thinking outwards. When creating the workflow from scratch, it's done two things. The first, in some cases, is that it validates the process. From building the workflow, we're evidencing that the process is correct. In other cases, building a workflow makes you take a step back and reconsider. One of the biggest impacts, therefore, is that you get clarity over the purpose and structure of the process, because you begin to question: why have we got this process? Is this step necessary? Are we missing something here? Before we started with automation, we already had process maps. But automating gives you that extra consideration and confidence to interrogate what you're already doing, and make changes and validate the workload at each step.

We also consistently evaluate and improve, so it's not a static approach. One workflow that's worked really well for us is our **new supplier workflow** (fig. 7), whether that's a request for a new pencil supplier or piece of software. Over time, we've developed this workflow whenever things have gone in a slightly different direction to what we initially expected, so it's now honed to suit us just right.

The last thing that having automated workflows helps you achieve is identifying where you need a process, but might not already have one. For instance, with staff probation, we had a policy and a system, but it wasn't as tightly monitored through a process as we'd have liked. Now we have workflows, we've automated that whole process. This means that notifications are sent through that probation period in line with the probation policy, and reminders about when those meetings should be happening and who should be going. And we can send that to both the line manager and to the individual who's going through probation.

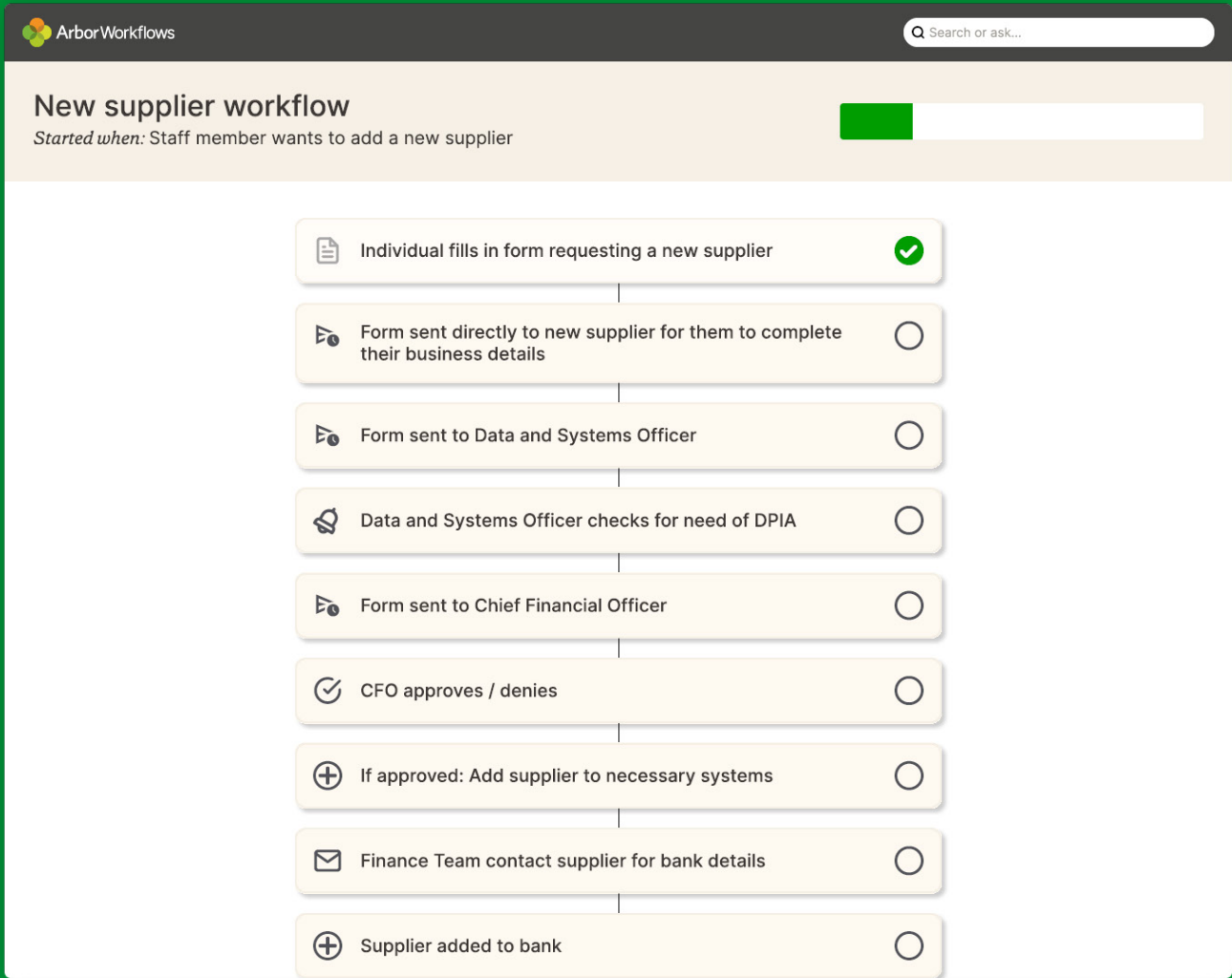
So while ultimately automating our workflows has saved us time and removed administrative workload in places, the main benefit for us has been clarity and consistency. It's helped us consider how we're working, either by identifying opportunities or validating our existing processes.

Our approach

This wasn't something we realised right away, though. Instead, we started with thinking big. It was only when we took a step back and really began to nail one small process at a time that we started to get the most value out of workflows. Now we've built up a foundation where the workflows are in a good place and bringing value, so our ambition can start to grow again. We can see a lot more opportunity for the development workplace, for example, around monitoring the quality of teaching and learning, or around exclusions and suspensions. There's some huge gains to be made there in terms of compliance; knowing that we can rely on a system to do the tricky, intricate parts of a process, like making sure the right paperwork gets to the right person at the right time, gives us quicker confidence in any process.

Our advice to other trusts and schools would therefore be to get that foundation spot on. Ask yourself what are you trying to achieve, what is the purpose of each process, how can you improve it? Use the opportunity to sharpen your ways of working.

Fig. 7



Inside the trust that treats *innovation* as a *habit*, not a headline



Schools:

12

primaries

Location:

London
and Surrey

Students:

10,000



Alison Day
Executive Director
of Growth & Dev.



Della Horwood
IT Development
Manager

We’re always growing our knowledge at LEO in order to best serve our community. That means we’re constantly on the lookout for technology which is going to better the experience of our staff and students, which in turn means that early adoption of innovative systems has become part of who we are.

In 2019, we completed our migration to a comprehensive cloud-based model, strategically adopting Arbor as our MIS and establishing Google as our core education platform. Whether it’s classroom technology or operational and data excellence, nobody is afraid to try something new if it means an opportunity for improved efficacy and delivery. Some trusts still rely on a paper-based approach: we have a clear expectation at LEO that all staff members embrace technology for good, and are proficient in using it, meaning our onboarding process proactively introduces staff to the systems and support they need. With all of that in mind, it’s perhaps unsurprising that we were an early adopter of Workflows.

Before we automated our processes

Before we were able to automate them, our manual processes presented significant risks and management challenges. We were often reliant on the original creator of a process to deliver it each time, troubleshooting if we faced issues and doing all the

in-between follow-ups and actions that are necessary to keep a process running. For instance, with staff onboarding, our Compliance Team had to manually diarise follow-ups and checks after sharing the onboarding checklist with a new employee. Relying on manual steps leads to errors and delays, which is not good in any organisation, but especially not one which is growing.

This way of working just seems obvious to us as people who put a lot of thinking into the efficacy of their operations. When we first saw the product in action, we were impressed by the idea, and showed it to a representative team of many different roles across the trust: we could see from this moment the impact it could have on so many arms of our organisation.

Fig. 8

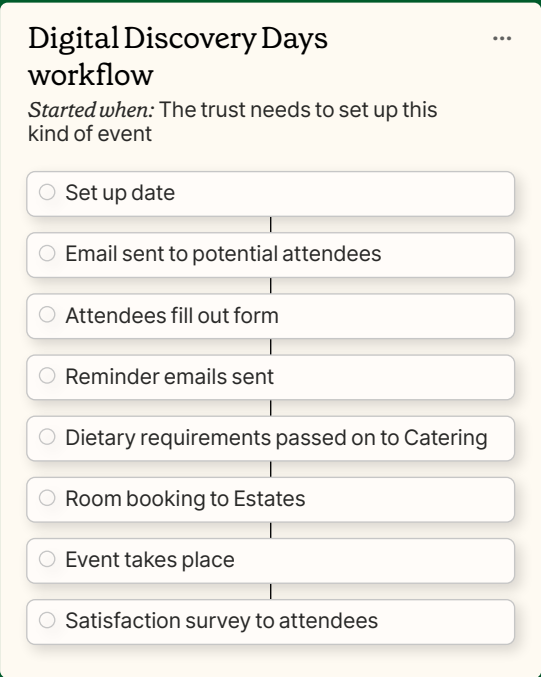


Fig. 9

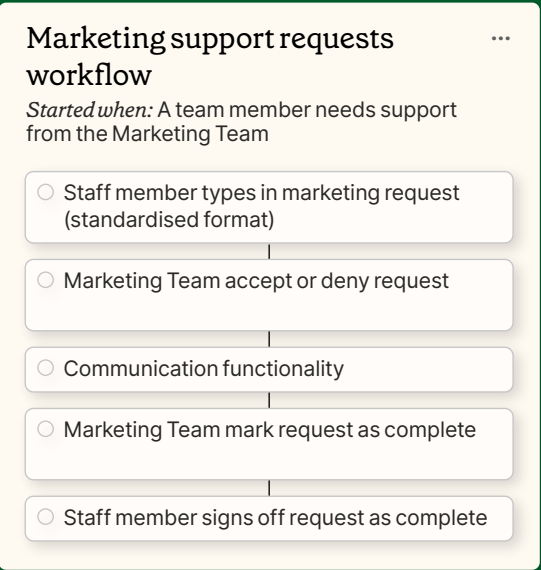
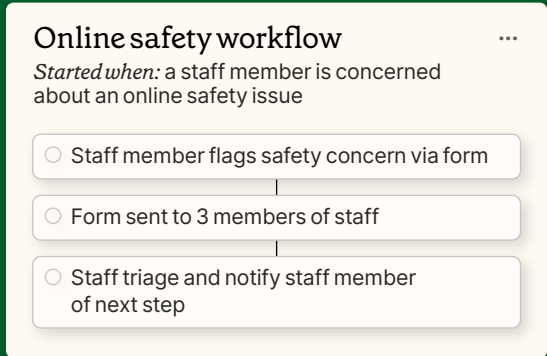


Fig. 10



Online safety concern submission (fig. 10)

Online safety concern submissions are a critical part of our safeguarding procedures, demanding a careful balance between robust web filtering and avoiding unnecessary over-blocking to ensure children remain safe. Our automatic workflow expertly mediates this process. When staff identify a child accessing inappropriate content, they log it via a form. This immediately triggers a triage process involving the trust’s Online Safety Lead, the IT Lead, and the Digital Lead, allowing us to collaboratively determine the appropriate action. This shared expertise ensures we make the best decisions for our students, whether that means implementing an immediate block or concluding that the incident is a behavioural matter for the teacher to address. Crucially, the workflow provides a traceable, documented justification should we ever need to revisit a decision about a blocked site.

Our top six workflows in practice

With that in mind, we wanted to share a little bit about the top six impactful workflows which we use at LEO, bringing in different roles and audiences from all over our trust.

Onboarding new starters

Our workflow here means that staff are onboarded in an organised, compliant way. Schools joining the trust have gaps in their staff records, which we need to rectify or put a risk assessment in place for. With our workflow, staff cannot start work until all the checks are adequately in place, meaning a safer recruitment process. We now have visibility of where a process is, spot any holdups immediately, send reminders automatically etc.

Growing Great People

Within our trust we ensure every member of staff is allocated a coach and has an appraisal focus, through our Growing Great People framework. The automation of this process removes a significant administrative burden from school senior leaders, streamlining organisation and eliminating the need for constant manual follow-ups.

Digital Discovery Days (fig. 8)

We hold Digital Discovery Days in various schools where we invite people externally to come to the school for the day to see our technology in action. It can be up to 40 people to be hosted at once, meaning we need a two-pronged approach: registering the attendees and also general event administration, such as room booking, catering, dietary requirements, office team setting up visitors in the system. When an attendee selects a date, it kickstarts the workflow and all of these processes begin to take place automatically, so that everybody is notified at the right time, whether they’re an attendee filling out their details or getting a reminder, or the teams organising the event. Without the workflow, there’s room for human error, such as last year, when we sent out an email with some of the wrong information in. The workflow process can cover everything from end-to-end, even the satisfaction survey post-event.

Marketing support requests (fig. 9)

The Marketing Team previously received marketing support requests from staff in unstandardised formats, often with unaligned briefs. By creating a workflow with an attached marketing request form, we achieved two key goals: we standardised the entire request process, making it significantly easier for the Marketing Team to manage their workload, and we provided transparency to all stakeholders regarding the current stage of each request, establishing a clear, traceable record of work.

Staff agreement process

The staff agreement process, now built into a single workflow, has been a game changer. What was once an onerous job of chasing staff for set tasks by our Compliance Team is now minimised, as all team members receive timely and relevant reminders based on their progress. This automation drastically reduces the manual follow-up, leaving only a handful of individuals who may have overlooked the reminders.

The impact this has had on our team

When we initially set out to automate our workflows, we established clear goals focused on:

- Consistency and compliance
- Workload reduction
- Establishing a unified platform: avoiding different software for different processes and teams

We have since invested time perfecting these workflows, gathering feedback, and refining them to ensure these objectives are continually realised across various teams within our trust. Our top six workflows alone demonstrate the diverse portfolio and extensive reach of this automation. The overall impact is that by “singing from the same hymn sheet,” we have achieved greater compliance, efficiency, and transparency. As a result, no processes now grind to a halt, and everything continues to move forward efficiently, as it should.

Arbor Workflows for MATs

Exciting news! On 1st March 2026, we're launching Arbor Workflows as part of Arbor, available in our brand new tiers.

If you're already part of the Arbor Community, get in touch with your Partnership Manager to find out more.

Not yet using Arbor? We'd love to hear from you at hello@arbor-education.com

ArborWorkflows

Activity

My Things

Workflows

Search or ask...

Onboarding New Starter

11 workflow runs

All

In Progress

Overdue

Complete

Mid-Year Starters

September Starters

Starters after June

+ Add View

School(s)

Started Date

Status

Steps

Board

List

All Workflow Runs

Tony Craig

Ace Academy Trust

Christopher Longbottom

Sparrow Ace Academy

Ed Butcher

Dove Ace Academy

Eddie Edwards

Fisheries Academy

Sarah Smith

North Academy

Melina York

NJ Academy

Kirin Lee

Main Academy

Trust

2/9 Complete

Christopher Longbottom

Onboarding New Starter

Started June 21, 2025

Sparrow Ace Academy

Overdue / Held

Action

Steps

1. Workflow Successfully ...

Nov 25, 2025

2. Workflow Successfully / Pre-Employment Checklist

Nov 25, 2025

1. Workflow Successfully ...

Nov 25, 2025

Form successfully sent by email to: arbor+3738@arbor-education.com

The form has been opened for the first time

The form is complete

✓ Automatic reminder sent to staff to complete form



Notes

[illegible]

Got a question? We'd love to hear from you...

Get in touch at hello@arbor-education.com

