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Shadow Process Check

Identify Hidden Risks in
Your Business Processes

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Excel, Email Chaos, Data Silos: **Manual Workarounds** in a Modern ERP Environment

Even with modern ERP systems, teams still rely on Excel, emails, or other workarounds every day. These “shadow processes” usually arise to close system gaps and keep day-to-day operations running. But what begins as a quick fix soon becomes an obstacle. Processes slip away from the central system, transparency fades, and errors accumulate.

What are shadow processes, what impact do they have, and how can they be replaced? This check outlines the key facts.

What Exactly Are **Shadow Processes**?

Shadow processes are workflows that develop outside central IT systems. Employees turn to these improvised solutions when existing systems do not fully meet their requirements or when necessary integrations are missing.

They typically emerge as a complex mix of:

- **Excel spreadsheets**
- **Email coordination**
- **Standalone isolated solutions**

These processes supplement, replace, or bypass official workflows, but they lack consistency, transparency, and central governance.

The Noticeable **Impact** on Daily Operations

Shadow processes are not a purely theoretical construct. They have a direct impact on key business objectives:

Slower workflows due to manual detours

First and foremost, they slow down daily operations. Information is entered multiple times, transferred manually between tools, or coordinated laboriously by email. What may look like little effort in a single step adds up to noticeable delays across the entire process.

Loss of transparency and control

Most serious, however, is the loss of transparency. When processes take place outside the system, clear status information, traceable changes, and unambiguous responsibilities are missing. This eliminates the essential foundation for active management and process optimization.

Increased susceptibility to errors due to inconsistencies

At the same time, the likelihood of errors increases. When teams maintain data in multiple places, inconsistencies inevitably arise: different versions, manual input errors, or conflicting information. Such errors often go unnoticed for a long time and lead to extensive rework or even poor decisions.

The Audit Trail Ends Here



Shadow Processes in Practice: Why **Regulated Companies** Reach Their Limits

In regulated industries, these negative effects intensify dramatically. Strict requirements apply here for documentation, traceability, and process reliability. In concrete terms, this means every step must be traceable, every change documented, and every decision verifiable. Systems must actively support these strict requirements – not just administratively, but directly within operational processes.

This is exactly where shadow processes become a critical liability. Manual lists, email approvals, or parallel documentation cannot be tracked seamlessly and are by no means audit-proof. The high demands placed on integrated, documented processes highlight how important a central system with a clear structure, versioning, and controlled access really is. Shadow processes systematically undermine this standard and therefore become a serious risk for compliance and upcoming audits.

The Most Common Sources of Shadow Processes

In practice, the following areas are especially vulnerable to shadow processes:

Production and quality assurance

Planning data or formulations are often maintained in Excel, or important approvals are organized outside the system because standardized processes are missing or are perceived as too inflexible.



Documentation

Documents move through the company by email and are stored on local hard drives or in different systems. The result is inconsistencies and a lack of traceability.



System interfaces

If systems are not cleanly integrated, employees transfer data manually or maintain it in parallel. Over time, this leads to a highly fragmented data landscape.



The Shadow Process Check: Guiding Questions

Shadow processes can rarely be uncovered through system analyses alone. Instead, they reveal themselves directly in day-to-day work. A structured look at the key guiding questions provides clarity:

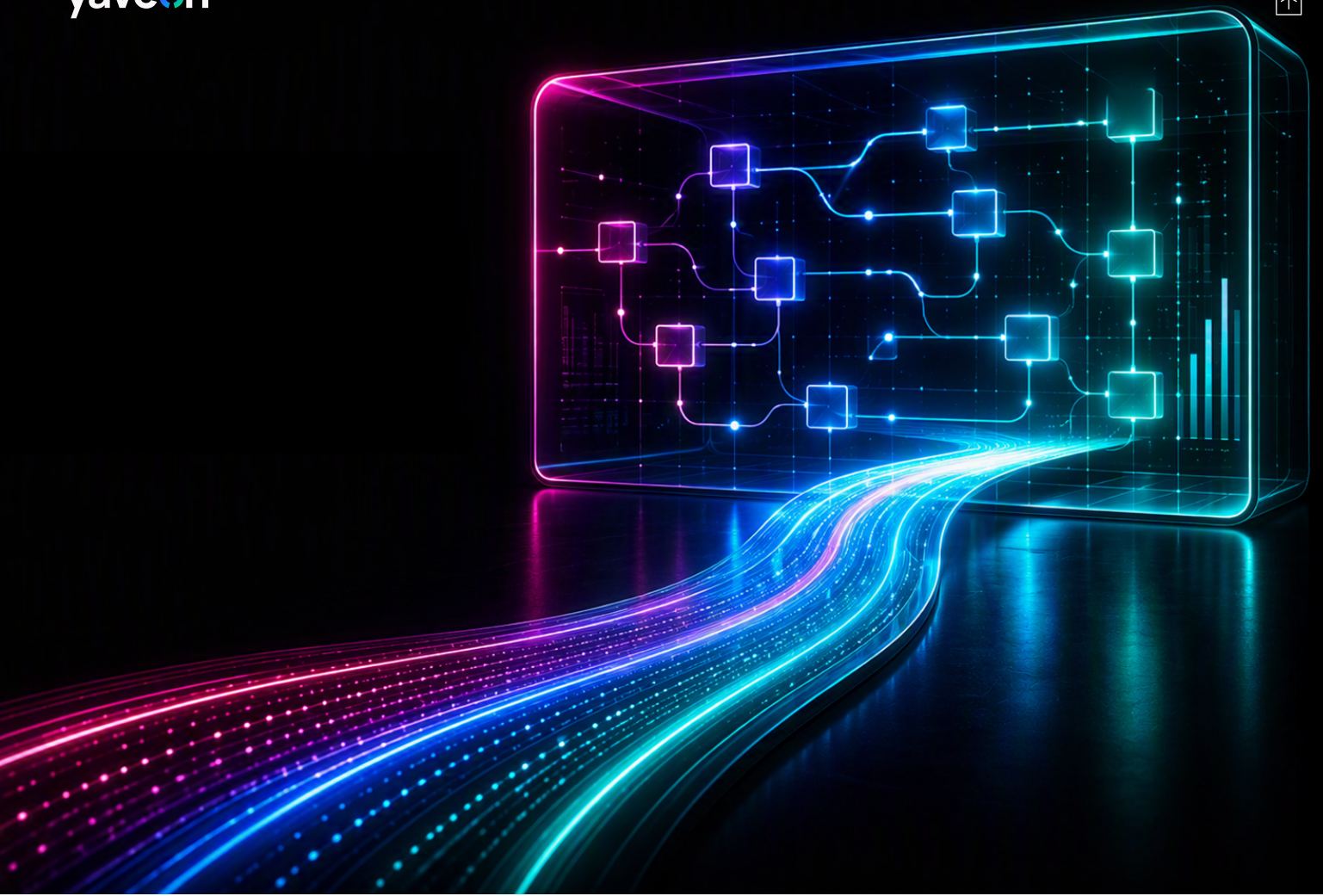
- ❑ Where do teams maintain or process data outside the ERP system?
- ❑ At which points do media discontinuities arise between the system, Excel, and email?
- ❑ Are multiple versions of the same information circulating within the company?
- ❑ Are approvals and changes fully traceable within the system?
- ❑ Do critical processes depend on the knowledge of individual people?

These questions make it visible where workflows today are still not managed consistently end to end.

What Needs to Change: Bringing Processes and Systems into Alignment

Shadow processes cannot be resolved as an isolated problem. Rather, they are a symptom that processes and systems are not yet working together seamlessly.

The solution lies in the consistent integration of workflows: with clear responsibilities, continuous data, and system-supported traceability. This means processes must be managed within the system, data must be centrally maintained, and decisions must be documented exactly where they arise. This creates a solid foundation for greater efficiency, the highest quality, and reliable compliance.



Transparency as a Prerequisite for True Control

It has become clear: shadow processes do not arise by chance. They show where companies – especially those in regulated environments – reach their structural limits. Those who identify these sensitive areas and address them deliberately improve their workflows measurably: processes become faster, data becomes more reliable, and decisions become better informed. Above all, however, transparency returns – and with it the valuable ability to actively manage processes again instead of merely administering them.

Find out where valuable time, transparency, and compliance are being lost in your processes.

[Request Your Shadow Process Check](#)



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